



Munis Human Resources and Payroll

Major Enhancements

Version 10.3

March 21, 2013

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Munis Human Resources and Payroll

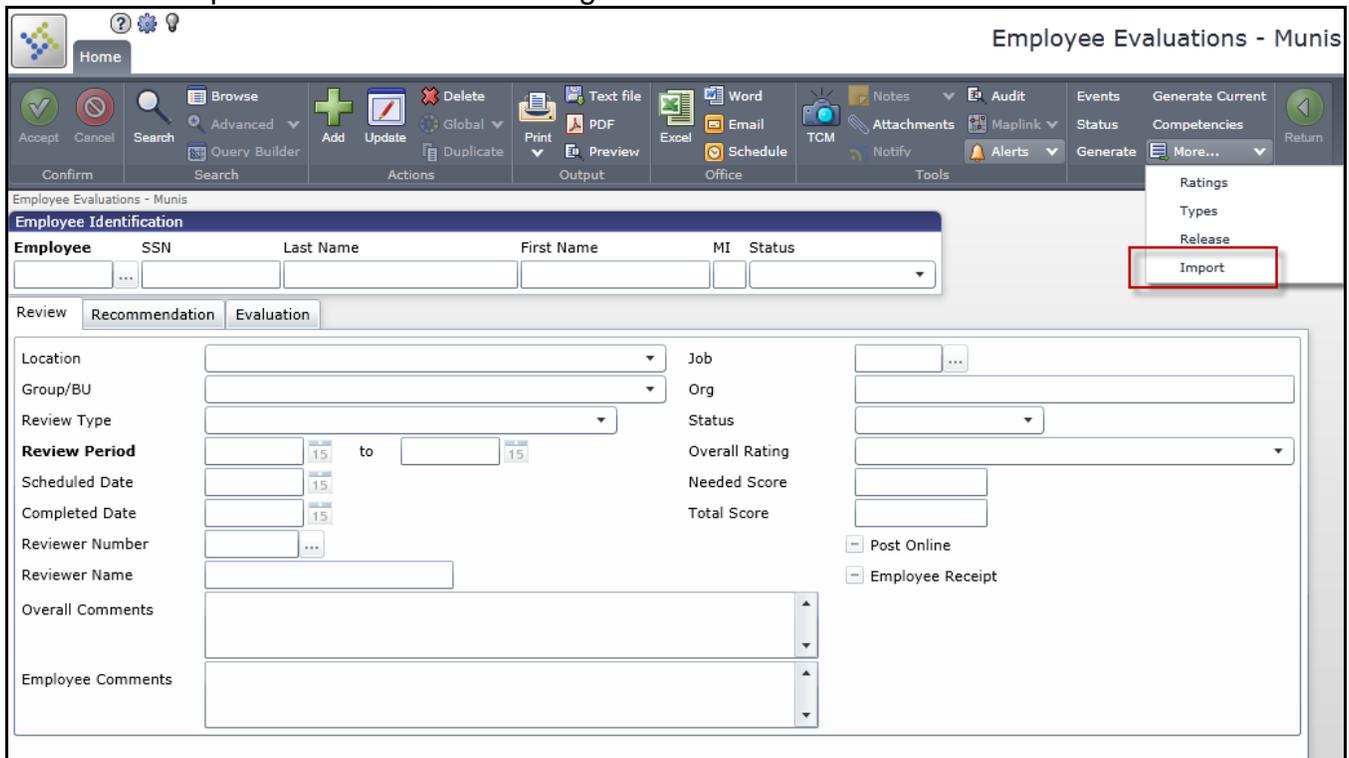
This document provides an overview of the major HR/Payroll enhancements for Munis Version 10.3. The Munis Human Resources and Payroll product includes Employee Self Service (ESS).

Human Resources

The following changes apply to Munis Human Resources programs.

Employee Evaluations

The Import option in the Employee Evaluations program enables you to import new evaluation records or to update the details of existing evaluation records.



The fields imported by this function are determined by a customizable import form definition.

Employee Training

The Employee Training programs have been expanded to include a points system for tracking employee training and functionality to accommodate guest training.

Training Points

The training-points functionality tracks employee training by a points system. This functionality can be used, for example, to track employee progress toward qualifying for re-certification as well as to grant that re-certification.

The training-points functionality includes the Training Point Type code in the Payroll Miscellaneous Codes program, which you can use to define types of points to use for tracking employee training.

The screenshot shows the 'Miscellaneous Codes - Munis' application interface. The main form is titled 'Miscellaneous Codes - Munis' and contains the following fields:

- Code Type:** TRPT - TRAINING POINT TYPE
- Code:** OE
- Short Desc:** ONGOING ED
- Long Desc:** ONGOING ED
- Data:** (empty field)

The interface includes a top navigation bar with 'Home' and a toolbar with various icons for actions like Accept, Cancel, Search, Add, Update, Delete, Print, PDF, Excel, Word, Email, Schedule, TCM, Notes, Attachments, Maplink, Notify, Alerts, Show Types, and Return. The bottom status bar shows '1 of 1' records.

In the Training Courses program, the Course Details tab includes the Points Type and Accredited Points fields.

The screenshot shows the 'Training Courses - Munis' application interface. The 'Course Details' tab is active, and the following fields are visible:

- Days:** Mon, Tue, Wed, Thu, Fri, Sat, Sun
- Minimum Size:** 1
- Maximum Size:** 40
- Current Size:** 1
- Hours Type:** (dropdown menu)
- Accredited Hours:** 0.00, **Factor:** 0.00
- Points Type:** OE - ONGOING ED (highlighted with a red box)
- Accredited Points:** 2.0000 (highlighted with a red box)
- Comment:** (empty text area)
- Cost:** (empty text area)

The interface includes a top navigation bar with 'Home' and a toolbar with various icons for actions like Accept, Cancel, Search, Add, Update, Delete, Print, PDF, Excel, Word, Email, Schedule, TCM, Notes, Attachments, Maplink, Notify, Alerts, and Return. The bottom status bar shows '1 of 1' records.

The Points Type list defines the type of points that employees earn by completing the active course, for example, a college course or specialized skill training course. The Accredited Points box defines the number of accredited points the employee earns for completing the course, if the course is accredited.

The Employee Training Points program maintains the training points earned by employees.

Employee Training Points - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Print Text file PDF Preview Excel Word Email Schedule Office Notes Attachments Audit TCM Notify Alerts Expend Certifications Manual Entry Return

Employee Training Points - Munis

Employee Identification

Employee	SSN	Last Name	First Name	MI	Status
166355	001-11-1122	LEVESQUE	CECILE		ACTIVE

Location: 135

Employee Points Summary

Point Type	Description	Total
OE	ONGOING ED	20.0000

Employee Points History

Date	Point Type	Action	Earned	Used	Course Link
01/14/2013	OE - ONGOING ED	EARN - Earn	20.0000	0.0000	100/110/12-15-

1 of 1 Attachments (0)

The Employee Training Points Inquiry program provides all employee-training point records in a display-only format.

The training-points functionality is fully integrated into ESS. On the Application Settings page in ESS Administration, the Training Uses a Points System check box indicates that ESS should use the points system for tracking employee training.

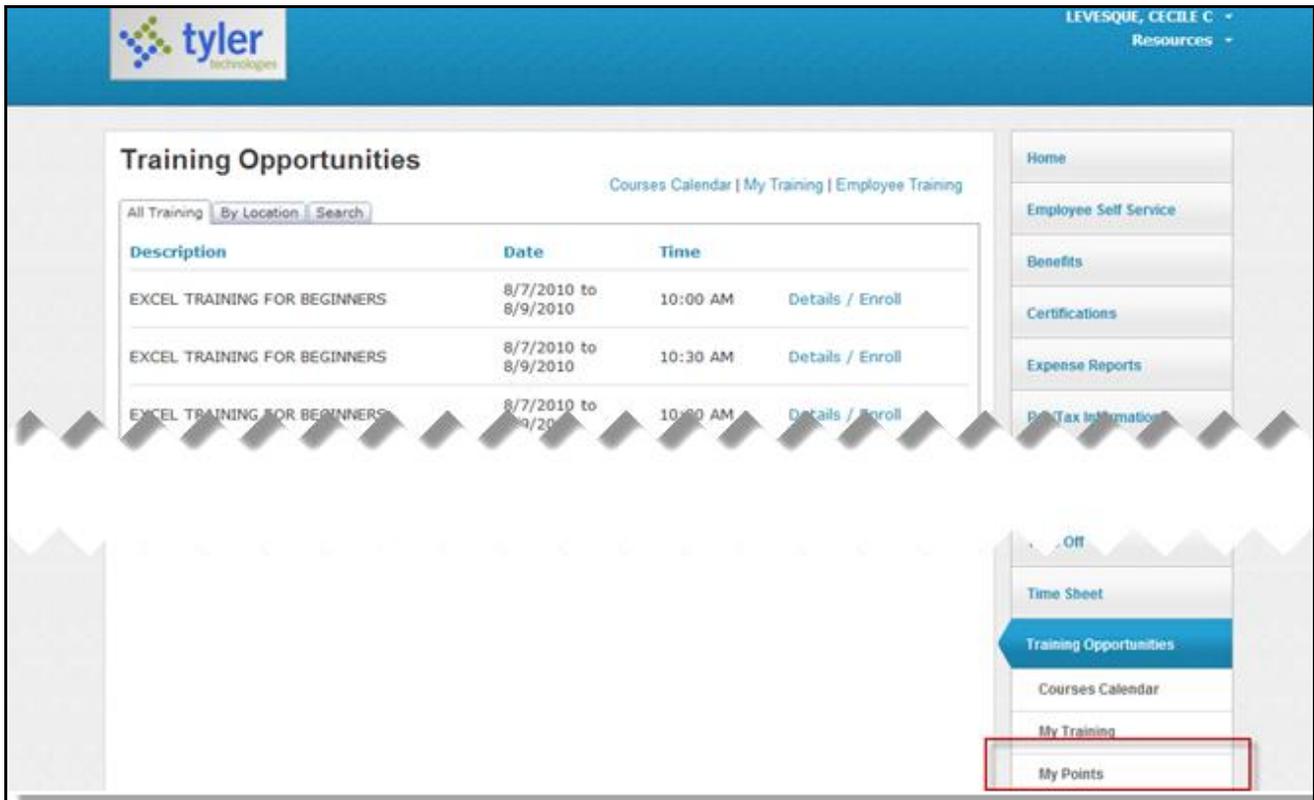
Employee Training

Allow access to training opportunities

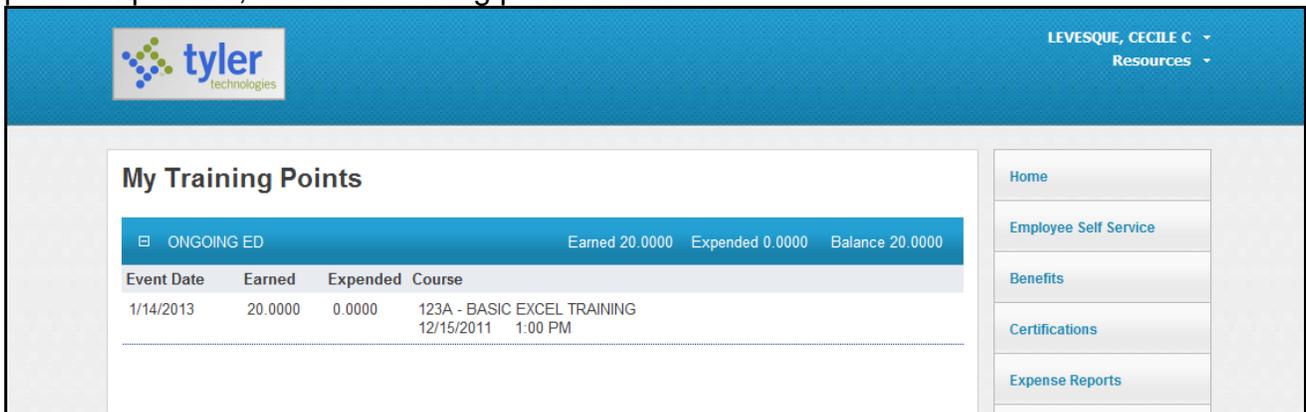
Training uses a point system

Display guest training

When you configure ESS to use points, the My Points option is available under Training Opportunities on the ESS menu.



When employees click My Points, the program displays the My Training Points page, which displays previous courses organized by points type. In addition, it displays points earned, points expended, and the resulting points balance.



The My Training page displays the employees' points information and hours information. When you do not configure ESS to use a points system, the page displays only hours information.

My Training

Scheduled [Return to Training Opportunities](#) | [Hide Training History](#)

No Scheduled Training found for the selected employee.

* This course is in conflict with another course for which you are scheduled.

Training History - 40.0000 total points

Description	Completed	Score	Hours	Points	
BASIC LANGUAGE USAGE ONGOING ED	1/7/2013		0.00	20.0000	Details
BASIC EXCEL TRAINING ONGOING ED	1/14/2013		0.00	20.0000	Details

Navigation menu: Home, Employee Self Service, Benefits, Certifications, Expense Reports, Pay/Tax Information, Performance Evaluations.

In the Personnel Settings program, the My Points Text option displays the My Points Text screen, where you can view or update the instructional text included on the My Training page in ESS.

Personnel Settings - Munis

Settings | Position Control | Training

Catalog Begin Date: 07/01/2007

- Use Training Codes
- Use Workflow Approval
- Notify Employees
- Use Vendor as Instructor
- Update Waitlist after Course Drop
- Update Waitlist after Course Size Increase
- Allow All Type/Area Combinations

My Points Text

Personnel Settings - Munis > My Points Text

This page displays the total number of points you have earned through training.

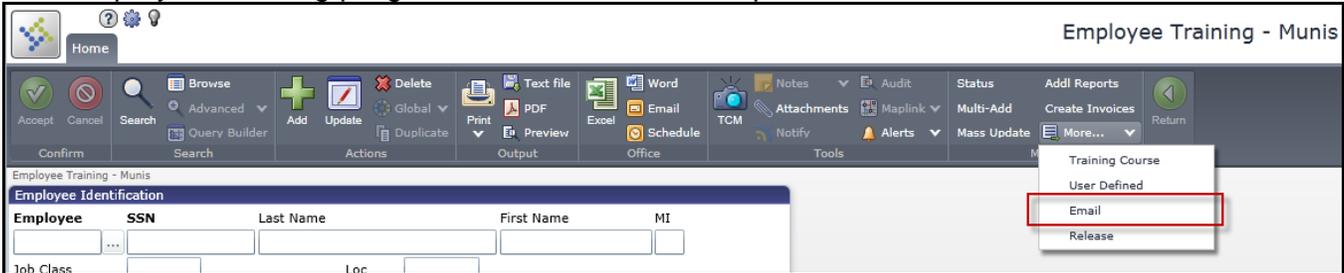
My Training Points

This page displays the total number of points you have earned through training.

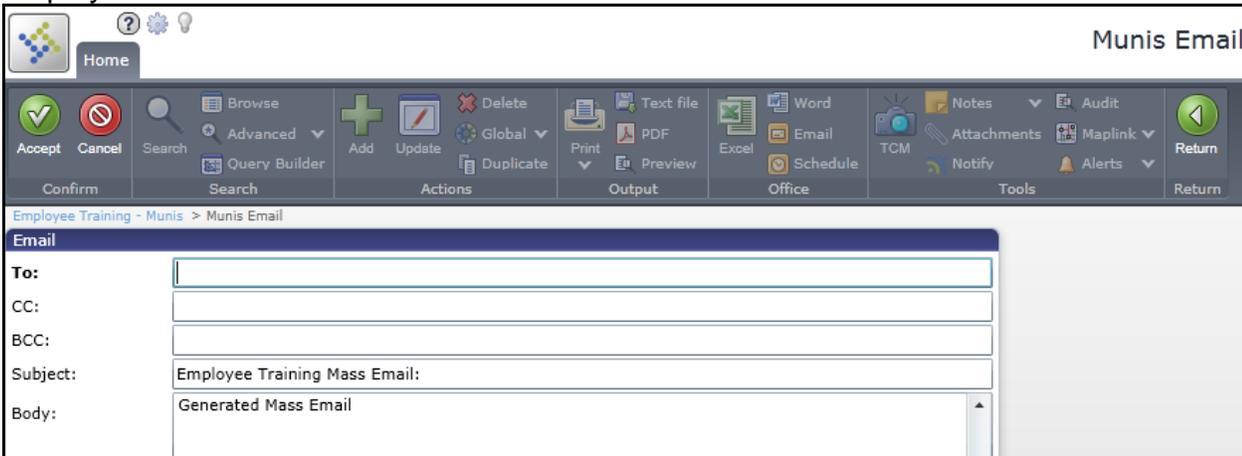
ONGOING ED	Earned 20.0000	Expended 0.0000	Balance 20.0000
------------	----------------	-----------------	-----------------

Employee Training

The Employee Training program includes the Email option.



Click Email to display the Munis Email screen, where you can write and send an email to all employees in the active set.



Guest Training

The guest-training functionality in the Employee Training programs enables you to make courses available to individuals who are not employees of your organization.

To configure guest training, select the Posting Option list on the Main tab of the Training Courses program.

Training Courses - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Delete Global Duplicate Print PDF Preview Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Return

Confirm Search Actions Output Office Tools Menu Return

Training Courses - Munis

Main Course Details Restrictions G/L Accounts User Defined

Course Type 100 - COMPUTER TRAINING

Course Area 110 - MS EXCEL

Course Date 07/09/2007

Course Time 1000 - 10:00 AM

Course Seq 1

Course Code SESSION 1

Description EXCEL TRAINING FOR BEGINNERS

Course Location ITTR - IT TRAINING ROOM

Vendor/Instructor TM TIM MCENENY

Course Activity

Course Dates 08/07/2010 to 08/09/2010

Enroll Deadline 08/01/2010

Course Length 3 HOURS

Posting Option B - INTERNAL AND EXTERNAL

N - NOT POSTED

Y - INTERNAL ONLY

B - INTERNAL AND EXTERNAL

Course Information Course Equivalents Notes

The Posting Option list indicates who can view the course in ESS. Use the B – Internal and External option to specify that the course is available to both employees and individuals who are not employees, or guests.

The Training Course Guests program maintains records for training guests, including their general information and course history

The screenshot shows the 'Training Course Guests - Munis' application interface. At the top right, the title 'Training Course Guests - Munis' is displayed. Below the title bar is a navigation menu with options like 'Home', 'Accept', 'Cancel', 'Search', 'Browse', 'Advanced', 'Query Builder', 'Add', 'Update', 'Duplicate', 'Delete', 'Global', 'Print', 'PDF', 'Preview', 'Excel', 'Word', 'Email', 'Schedule', 'Office', 'TCM', 'Notes', 'Attachments', 'Maplink', 'Alerts', 'Notify', 'Tools', 'Create Training', 'Menu', and 'Return'. The main content area is divided into three sections: 'Guest Identification', 'Contact Information', and 'Guest Courses'. The 'Guest Identification' section contains a table with columns for Guest, SSN, Last Name, First Name, and Middle Name. The 'Contact Information' section contains fields for Address Line 1, Address Line 2, City, State, Zip, Country, and County, along with Phone and Email fields. The 'Guest Courses' section is a table with columns for Type, Area, Date, Time, Seq, Course Status, Workflow Status, Point Type, and Points. At the bottom, there is a status bar showing '1 of 1' and 'Attachments (0)'.

Guest	SSN	Last Name	First Name	Middle Name
2	112-22-3334	CROZIER	JONATHAN	MOIRA

Type	Area	Date	Time	Seq	Course Status	Workflow Status	Point Type	Points

Guest records created and added to a course are accommodated within the existing waitlist functionality, and are included in report generation or when calculating the occupancy of a course.

When a guest record is active, click Create Training to display the Employee Training Conversion screen.

The screenshot shows the 'Employee Training Conversion' screen within the 'Training Course Guests - Munis' application. The title bar at the top right reads 'Employee Training Conversion'. The navigation menu is similar to the previous screenshot but includes 'Define' and 'Generate' options. The main content area is titled 'Conversion Options' and contains a form with the following fields: 'Employee' (a dropdown menu), 'Completed Date' (a date field set to 01/01/1900), and a checkbox labeled 'Create Points History'. The status bar at the bottom shows '1 of 1' and 'Attachments (0)'.

This screen allows you to create employee training records for the guest. An employee record must already exist for the guest before training records can be created.

The Training Course Guests Inquiry program provides all guest training records in a display-only format.

The guest training functionality is fully integrated into ESS. When the Display Guest Training check box is selected in the Employee Training group on the Application Settings page in Employee Administration, guests can view courses that have been marked as external. The Display Guest Training option is not selected by default.

Employee Training

Allow access to training opportunities

Training uses a point system

Display guest training

Guests can view the details for a training course, but they cannot enroll. To enroll, guests must email the course contact.

Training Components

The Training Components Maintenance program creates and maintains course groupings that function as an extension of the training-type groupings.

Home
Training Components Maintenance - Munis

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Text file Excel Word Email Schedule TCM Notes Attachments Audit Maplink Alerts Notify Tools Menu Return

General

Component Number

Type

Fiscal Year

Title

Status

Year Established

Group/BU

Location

Contact Employee ...

Max Points

Methods

Learning Method

Primary Purpose

Implementation Method

Student Evaluation Method

Staff Evaluation Method

Audience

State Focus Area

Focus Area	Description

Training components are defined by fiscal year and include lists, such as Learning Method, Audience, and Audience, that allow you to select from user-defined values. Use the Training

The screenshot shows the 'Training Courses - Munis' application interface. At the top, there is a navigation bar with 'Home' and 'Training Courses - Munis'. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Browse', 'Add', 'Update', 'Delete', 'Duplicate', 'Print', 'Preview', 'Text file', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'Notes', 'Attachments', 'Audit', 'Maplink', 'Alerts', and 'Return'. The main content area is titled 'Training Courses - Munis' and has several tabs: 'Main', 'Course Details', 'Restrictions', 'G/L Accounts', and 'User Defined'. The 'User Defined' tab is active, showing a form with the following fields:

- Days: Mon, Tue, Wed, Thu, Fri, Sat, Sun
- Minimum Size:
- Maximum Size:
- Current Size:
- Hours Type:
- Accredited Hours: Factor:
- Points Type:
- Accredited Points:
- Comment:
- Cost:
- Target Audience:
- Info URL:
- Info URL Text:
- Contact Email:
- External Course:
- External Provider:
- Disable Workflow
- Restart Workflow

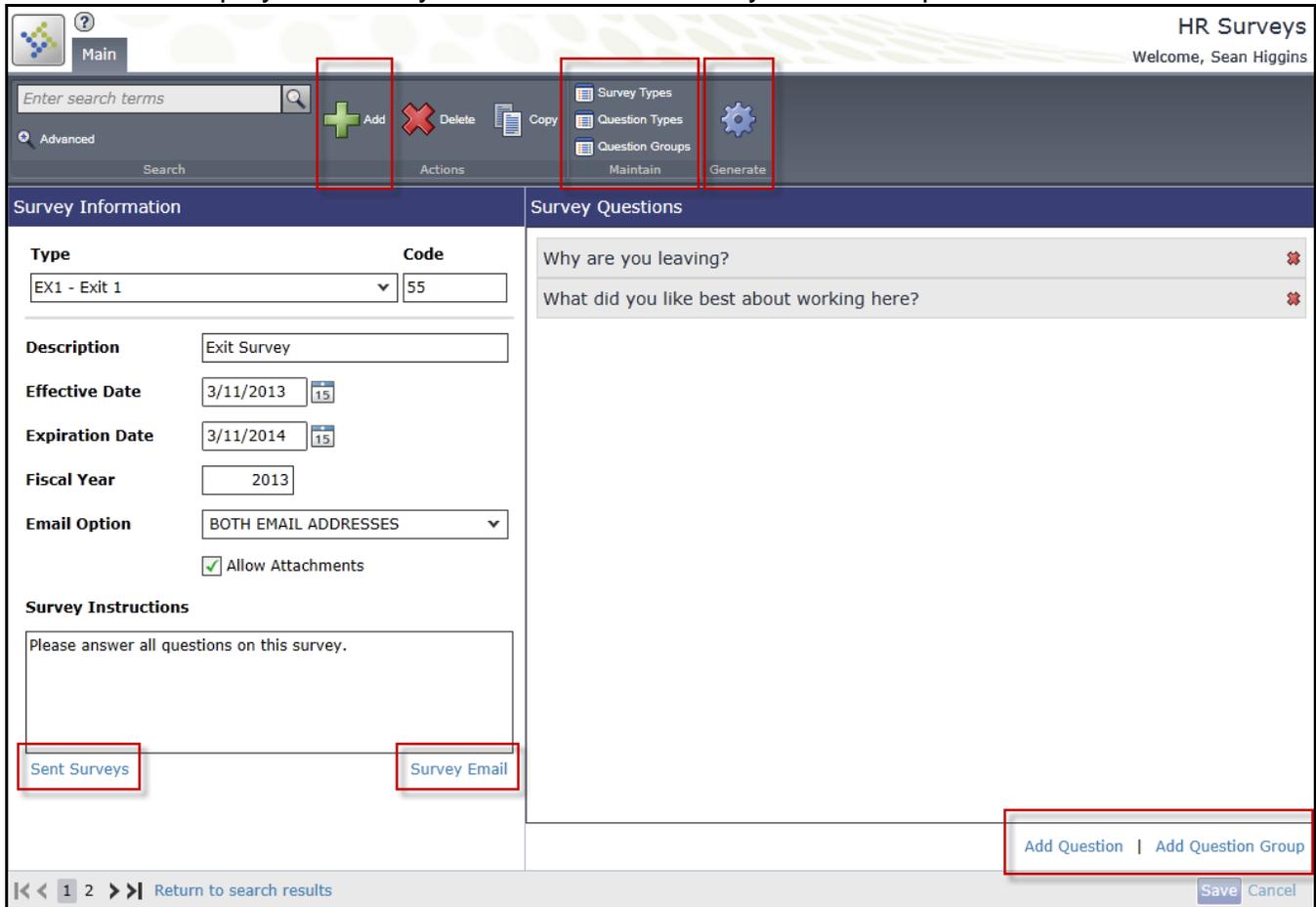
If you have the proper permissions, select the Disable Workflow check box to temporarily stop the workflow process for the course, for instance to add an employee to the course from the waitlist. Select the Restart Workflow check box to enable the workflow process.

HR Surveys

The HR Surveys program allows you to create, deliver, and track survey-related questions and answers for employee interviews. Using this program, you can create generic or job-specific surveys to capture data related to day-to-day operations or exit interviews.

The screenshot shows the 'HR Surveys' application interface. At the top, there is a navigation bar with 'Main' and 'HR Surveys'. Below this is a toolbar with various icons for actions like 'Add', 'Survey Types', 'Question Groups', and 'Question Types'. The main content area is titled 'HR Surveys' and has a search bar with the text 'Enter search terms'. Below the search bar, there are several tabs: 'Main', 'Survey Types', 'Question Groups', and 'Question Types'. The 'Main' tab is active, showing a search bar and a search button.

Click Add to display the Survey Information and Survey Questions panes.



The Survey Types, Question Groups, and Question Types options maintain standard survey information that can be used in any survey. The Add Question and Add Question Group options define the questions for a specific survey. When you add a question, available answer data types include date selection, text, decimal, and multiple choice.

The Survey Email option maintains the text of email messages distributed to employees to whom the survey applies. Each employee's survey email message includes a link to the survey in ESS.

The Sent Surveys option displays a list of the employees to whom the survey has been sent.

Employee #	Employee Name	Created Date	Submitted Date	Inactive Date	Anonymous
166355	LEVESQUE, CECILE	3/11/2013		3/11/2014	<input type="checkbox"/>

The Generate option displays the Selection Criteria and Survey Generate Results panes, which allow you to select and preview the employees to whom a survey will be sent.

HR Surveys
Welcome, Sean Higgins

Enter search terms

Advanced Search Return

Survey Generate Results (31)

Generate	Employee #	Employee Name	Job Class	Location	Group/BU	Organization	Hire	Inactive
<input checked="" type="checkbox"/>	4	JONES, TIM	FAC4	177	10	11135000	1/1/2006	6/1/2007
<input checked="" type="checkbox"/>	64	BEDIENT, TIM J	FAC4	135	10	11135000	7/16/2007	
<input checked="" type="checkbox"/>	85	BLOOMBERG, LINDSEY H	FDIR	135	10	1100	3/1/2009	
<input checked="" type="checkbox"/>	96	APPLETON, DYLAN PETER	FCL2	135	10	1000	12/1/2011	
<input checked="" type="checkbox"/>	104	AMATO, JOSEPH D	FCL1	155	10	11135000	5/1/2000	
<input checked="" type="checkbox"/>	109	WOO, JONATHAN K	ITDI	155	10	11155000	2/15/1990	
<input checked="" type="checkbox"/>	110	MILNER, NANCY K	ITPR	155	10	11155000	2/10/1991	
<input checked="" type="checkbox"/>	111	JORGENSON, MICHAEL K	ITPR	155	10	11155000	3/1/2001	
<input checked="" type="checkbox"/>	112	FRANZ, HERAD W	ITSS	155	10	11135000	5/30/1994	
<input checked="" type="checkbox"/>	113	DICKENSON, JUDY G	ITSS	155	10	11155000	10/10/2000	
<input checked="" type="checkbox"/>	114	VOLLMER, ERIC H	ITEG	155	10	11155000	8/19/2001	
<input checked="" type="checkbox"/>	115	HALONA, BLY I	SUPR	177	10	16177000	11/8/1984	
<input checked="" type="checkbox"/>	116	KINARD, ANTHONY M	RNG1	177	10	16177000	1/20/1984	
<input checked="" type="checkbox"/>	117	ORTEGA, ALEX L	RNG1	177	10	16177000	3/22/1988	
<input checked="" type="checkbox"/>	118	BALDRIDGE, ANNA K	PLAN	177	10	16177000	3/10/1979	
<input checked="" type="checkbox"/>	119	JORGENSON, LINDSEY F	RNG2	177	10	16177000	9/10/1988	
<input checked="" type="checkbox"/>	120	GREY, EDWARD D	MRSF	172	10	16177000	9/10/1988	
<input checked="" type="checkbox"/>	121	JANSEN, KEITH L	MRSF	177	10	16177000	10/2/1981	
<input checked="" type="checkbox"/>	143	PALMER, KENETH W	PWDR	172	10	14172250	9/17/1983	
<input checked="" type="checkbox"/>	154	JOSEPH, DOMINIC	FAC2	135	10	11135000	1/1/2007	
<input checked="" type="checkbox"/>	156	JACKSON, MARTIN	FAC1	135	10	1000	11/30/2011	
<input checked="" type="checkbox"/>	777	MULLEN, ELIZA E	ITPR	155	10	11155000	2/9/2010	
<input checked="" type="checkbox"/>	778	LEVESQUE, MARY	FAC2	135	10	1000	2/10/2010	

Selection Criteria

Location
0 item(s) selected Clear

Organization
0 item(s) selected Clear

Group/BU
1 item(s) selected Clear

Job Class
0 item(s) selected Clear

OR

Employee

Eligibility Criteria

Generate Criteria

Preview Generate Reset

Define the options in the Selection Criteria pane and click Preview to view a list of the employees who fit those criteria. To exclude a specific employee from the survey distribution, clear the Generate box for that employee in the Survey Generate Results pane. The Reset option clears all entered selection criteria.

The Generate option generates both the survey and the email you defined for the employees listed in the Survey Generate Results pane.

Exit Survey - Message (Plain Text)

Message Add-Ins

Reply Reply to All Forward Call Delete Move to Folder Create Rule Other Actions Block Sender Not Junk Categorize Follow Up Mark as Unread Find Related Select Find

From: Munis Surveys [MunisSurveys@Munis.com] Sent: Mon 3/11/2013 3:07 PM
To: Higgins, Sean
Cc:
Subject: Exit Survey

<http://devmss.tylertech.com/v103/sean.higgins/Surveys/TakeSurvey.aspx?e=%252BCiFmUQ3JBPAobGhc4uHy8kEAIAXJBH59q9Q74IXuDQokAGZfwSvw8botKLINv1r>

When employees click the link, ESS displays the survey page.

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Exit Survey

Please answer all questions on this survey.

Why are you leaving?*

Additional comments

What did you like best about working here?*

Additional comments

[Home](#)

[Employee Self Service](#)

[Employment Opportunities](#)

Test Tracking

Applicant Processing includes the test-tracking functionality, which records data related to tests taken by applicants.

The Condition Codes program, which maintains condition codes for tracking applicant processing activities, is expanded to accommodate the tracking of individual instances of tests. For example, you can define a specific condition code for an instance of a test, which allows you to define and track unique parameters for that instance, including test number, test date, and included test parts. In addition, you can associate this instance with job openings and track the results of applicants who complete it.

Condition Codes - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Global Print PDF Excel Word Email Schedule TCM Notes Attachments Notify Alerts Audit Maplink View History Elig. Report Return

Condition Codes - Munis

Main

Code: XCL

Job Family: 1AD - ADMINISTRATION

Description: EXCEL TEST

Short Desc: EXCEL TEST

Test Type: ADM - ADMIN BASIC OFFICE SKILLS

Test Code: OFF - ADMIN OFFICE SKILLS

Test Number: 523

Test Date: 01/18/2013 Start: End:

Request Date: Acknowledge:

Filing Deadline: Elig Begin: Elig End:

Fee? 0.00

Default Eligibility Copy Data

Test Parts

Test Part

- SKL1 - SKILLS LEVEL 1
- SKL2 - SKILLS LEVEL 2

Booklets

Booklet

Qualifications Needed

4 Years of High School or equivalent.

1 of 1

The Test Type list indicates the type of test required for the job opening. The Test Code and Test Number fields further identify the test. The Test Date fields identify when the testing occurs, and the remaining fields identify test specifics.

Once the applicant has taken the test, you can view and update the test data on the applicant record, which is available on the Application Tests and Conditions screen in the Applicant Master program.

Applicant Tests and Conditions

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Notes Audit Mass-Notes Import Scores Return

Confirm Query Builder Search Actions Duplicate Output Preview Office Schedule TCM Attachments Maplink Alerts Tools Menu Return

Applicant Master - Munis > Applicant Tests and Conditions

Applicant Identification

Applicant	SSN	Last Name	First Name	MI	Suffix
1	000-00-0001	SMITH	JOE		

Tests/Conditions

Condition/Test Code: 6201
 Test Number: 123
 Test Date: 11/15/2012
 Test Location: 100 - EMPLOYEE TRAINING CENTER
 Required Date: 12/01/2012
 Elig Date: [] Elig End: []
 Completed Date: []
 Result: []
 Comment: []
 Requisition: [] - [0]
 Approval Status: N - NOT STARTED
 Test Approver: [] Approval Notes: []
 Entry Date: 10/11/2012

Payment Information

Fee Paid: 0.00
 Payment Method: []

Score Information

Final Score: 0.00

Credits

Type	Credit
100 - BASE CREDIT FOR 1	0.00
Total Credits: 0.00	

Test Parts

Test Part	Score
PRS - PERSONAL INFO	100 - 100
SKL1 - SKILLS LEVEL 1	90 - 90 PI

Notes

Note Date	Type	Reference	Note
10/11/2012	PRS - PERSONAL NTOES	1234	Personal notes for JS for 6201 testing.

All related Applicant Processing programs, reports, and processes are updated to accommodate the test-tracking functionality.

Employee Self Service

The Course Details tab of the Training Courses program includes the Info URL, Info URL Text, and Contact Email fields.

The Info URL box indicates the web address of a link that displays on an employee's self service Training Opportunities page and in the course's Training Details page. The Info URL Text box defines the text of the link.

The screenshot displays the 'Training Courses - Munis' interface. The 'Course Details' tab is active, showing various configuration fields. The 'Info URL' field is set to 'http://www.moreinformation.com' and the 'Info URL Text' field is set to 'Visit the HR Site for More Information'. A red box highlights these two fields, and a red arrow points from the 'Info URL Text' field to the corresponding link in the 'Training Opportunities' table. The table lists training opportunities with columns for Description, Date, and Time. The 'EXCEL' training opportunity is highlighted, showing a date of 1/15/2013 and a time of 1:00 PM. The 'Info URL Text' is displayed as a link next to the description.

Description	Date	Time	
EXCEL TRAINING FOR BEGINNERS	8/7/2010 to 8/9/2010	10:00 AM	Details / Enroll
WORD TRAINING	1/14/2013	10:30 AM	Details / Enroll
EXCEL	1/15/2013	1:00 PM	Details / Enroll

The Contact Email box defines the email address of a contact who can provide more information regarding the course. This email address displays on the course's training details page.

Training Courses - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Search Add Update Global Duplicate Print PDF Preview Excel Word Email TCM Attachments Maplink Notify Alerts Return

Training Courses - Munis

Main Course Details Restrictions G/L Accounts User Defined

Mon
 Tue
 Wed
 Thu
 Fri

Minimum Size
 Maximum Size
 Current Size
 Hours Type
 Accredited Hours Factor
 Points Type
 Accredited Points
 Comment
 Cost
 Target Audience
 Info URL
 Info URL Text
 Contact Email

External Course
 Disable Workflow
 Restart Workflow

External Provider

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 LEVESQUE, CECILE C - Resources

Home

Employee Self Service

Benefits

Certifications

Expense Reports

Pay/Tax Information

Performance Evaluations

Personal Information

Position Transfer

Punch In

Substitute Teaching

Training Details

XCL [Return to previous view](#)

Description EXCEL

Dates 1/15/2013 to 1/15/2013

Days Tu

Time 1:00 PM

Length

Instructor JOHN SMITH

EMPLOYEE TRAINING CENTER

Location

Room 205
Phone

Accredited Hours 0.00

Accredited Points 20.0000

Points Type ONGOING ED

Contact Email humanresources@humanresources.com

Additional Information

User-defined fields specified for any course in the Munis Training Courses program display in ESS on the Training Opportunities page as well as that course's Training Details page.

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 LEVESQUE, CECILE C - Resources

Training Opportunities

[Courses Calendar](#) | [My Training](#) | [Employee Training](#)

All Training [By Location](#) [Search](#)

Description	Date	Time	
EXCEL TRAINING FOR BEGINNERS CELL PHONE: YES - COURSE CREDITS - 07/09/2007	8/7/2010 to 8/9/2010	10:00 AM	Details / Enroll
EXCEL TRAINING FOR BEGINNERS	8/7/2010 to 8/9/2010	10:30 AM	Details / Enroll
EXCEL TRAINING FOR BEGINNERS	8/7/2010 to 8/9/2010	10:00 AM	Details / Enroll
EXCEL TRAINING FOR BEGINNERS	8/15/2010	1:30 AM	Details / Enroll
MICROSOFT WORD	9/1/2010	10:00 AM	Details / Enroll
BASIC	12/15/2011	8:00 AM	Details / Enroll
WORD TRAINING	1/14/2013	10:30 AM	Details / Enroll
EXCEL LAPTOP: YES - COURSE CREDITS - 01/15/2013 Visit the HR Site for More Information	1/15/2013	1:00 PM	Details / Enroll

Home

Employee Self Service

Benefits

Certifications

Expense Reports

Pay/Tax Information

Performance Evaluations

Personal Information

Position Transfer

Punch In

Substitute Teaching

The Search tab on the Training Opportunities page enables you to find courses by searching for keywords in the course description and location description.

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Resources

Training Opportunities

Courses Calendar | My Training | Employee Training

All Training | **By Location** | Search

Word

Description	Date	Time	
MICROSOFT WORD	9/1/2010	10:00 AM	Details / Enroll
WORD TRAINING	1/14/2013	10:30 AM	Details / Enroll

- Home
- Employee Self Service
- Benefits
- Certifications
- Expense Reports
- Pay/Tax Information

The By Location tab groups the available training course by location headings, which can be expanded and collapsed.

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Resources

Training Opportunities

Courses Calendar | My Training | Employee Training

All Training | **By Location** | Search

EMPLOYEE TRAINING CENTER (3 courses)

Description	Date	Time	
BASIC	12/15/2011	8:00 AM	Details / Enroll
WORD TRAINING	1/14/2013	10:30 AM	Details / Enroll
EXCEL	1/15/2013	1:00 PM	Details / Enroll
Visit the HR Site for More Information			

IT TRAINING ROOM (5 courses)

- Home
- Employee Self Service
- Benefits
- Certifications
- Expense Reports
- Pay/Tax Information
- Performance Evaluations
- Personal Information
- Position Transfer

Payroll

The following changes apply to Munis Payroll programs.

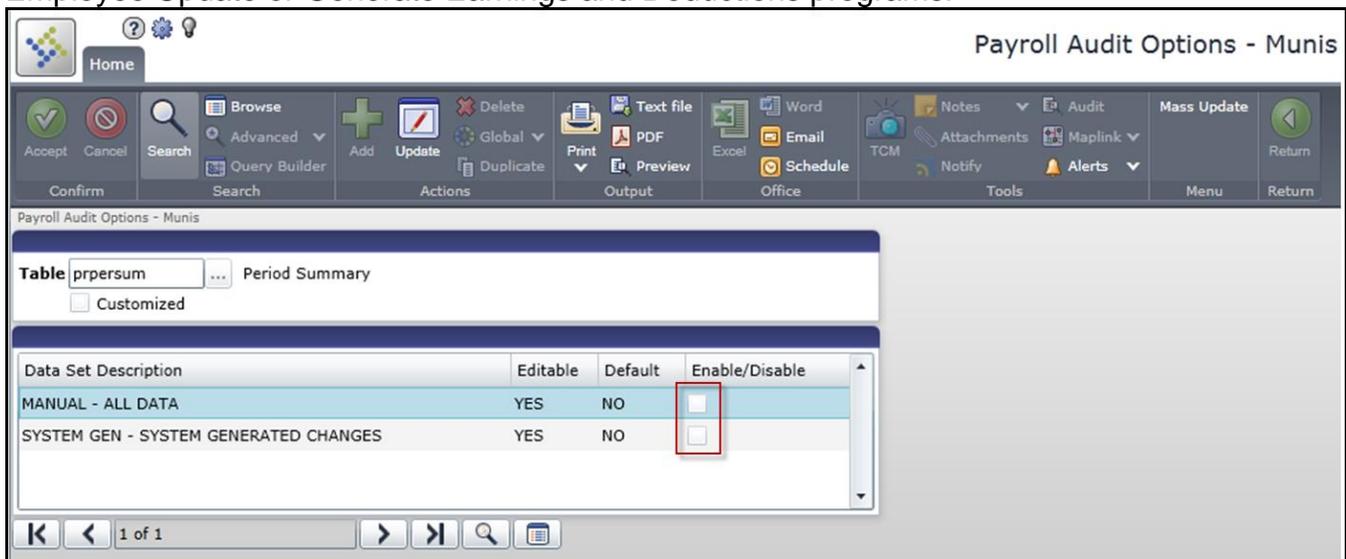
Audits

The system audits the old and new values of a field that is added, updated, or deleted. As a result, fields are properly audited when new records are added to a database, each record is reportable from outside of the Audit Inquiry program, and changes can be selectively excluded from auditing without breaking the audit trail. Both old and new values are stored on a single record.

Since auditing occurs on the database, this decreases the number of communications between two servers in split-server environments and improves the efficiency of the audit process.

During the audit process, more information is written to each audit record, including the name of the program from which the change was made. This allows you to determine how the change was made, when the change was made, and by whom it was made.

Though the audit tables are smaller in size, writing more data creates a greater number of audit records. To enable a more refined selection of changes to audit, in the Payroll Audit Options program, the All audit option has been replaced by the Manual and System Gen audit options for tables affected by programs that process changes at a mass scale, such as the Employee Update or Generate Earnings and Deductions programs.



The Manual option toggles auditing for all changes made by users. The System Gen option toggles auditing for system-generated changes made by specific programs. For instance, leave the System Gen option disabled for the Accumulators table to set the Employee Update program not to make audits to the table each time it is run, which greatly reduces the number of audits.

This functionality is available for the following tables. Each table is accompanied by the programs for which auditing can be toggled off and on with the System Gen option.

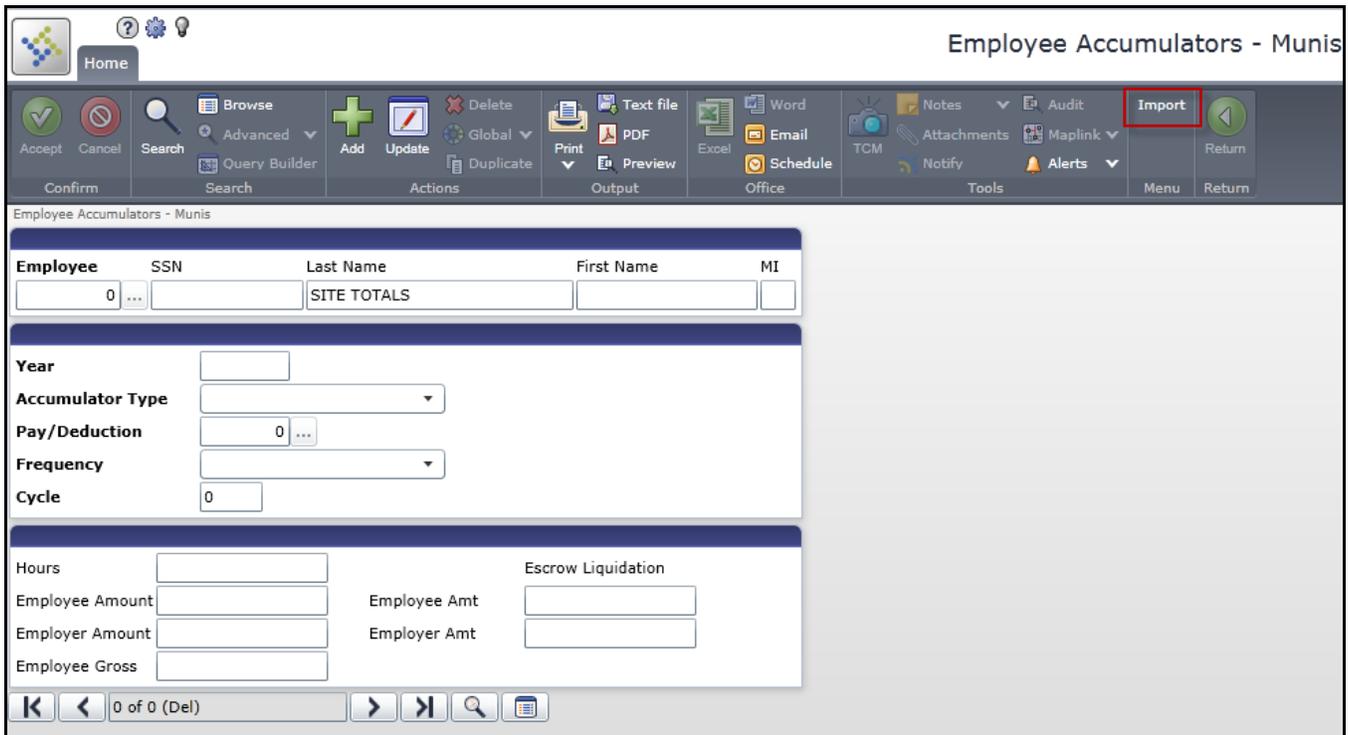
Table	Name	Programs
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions
prpmppay	Period Pays	Employee Update, Generate Earnings and Deductions
prpmded	Period Deductions	Employee Update, Generate Earnings and Deductions
prglallc	Period Pay Manual GL Allocations	Employee Update, Generate Earnings and Deductions
prperach	Period Accrual History	Employee Update, Generate Earnings and Deductions
prperacc	Period Accruals	Employee Update, Generate Earnings and Deductions
pryeeapp	Year End Accrued Expense Pays	Employee Update
pryeeapd	Year End Accrued Expense Deductions	Employee Update
prdedhis	Deduction History	Employee Update
prearnhi	Earnings History	Employee Update
prempacm	Employee Accumulators	Employee Update
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions

When the Manual option is enabled and the System Gen option is disabled, the system audits only changes made outside of the defined programs, whether those changes are made by other Munis programs or directly to the database. This results in a significant decrease in audit data size and communication with the database while preserving an otherwise comprehensive audit trail. In addition, payroll processing time is equal to when auditing is turned off.

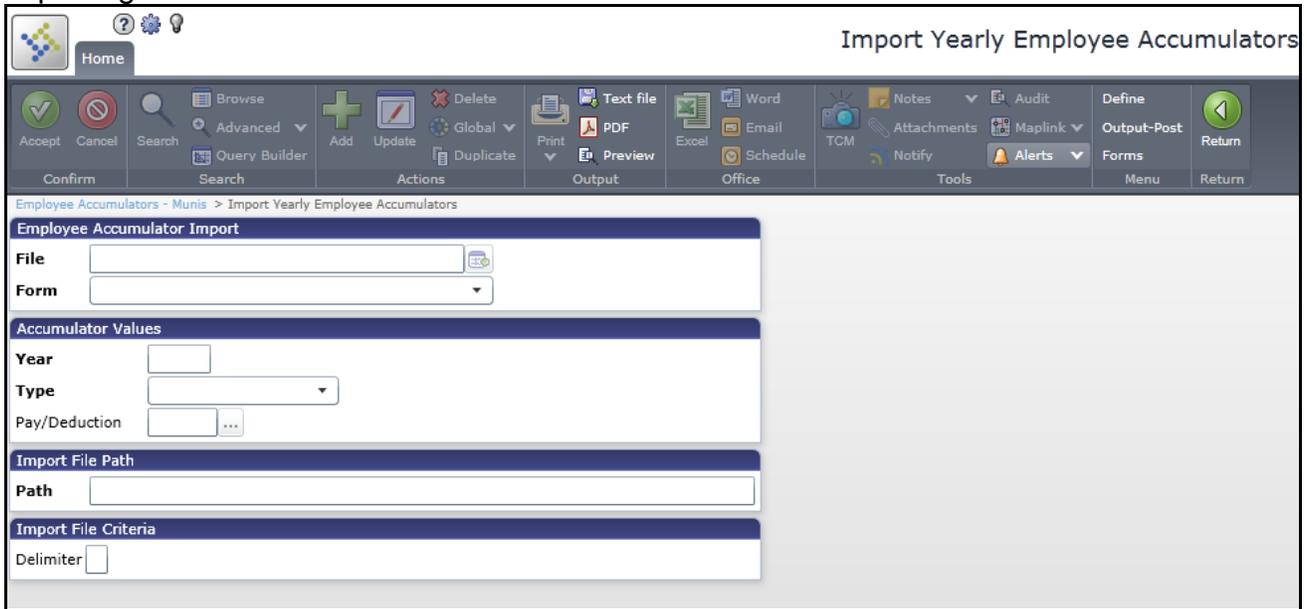
Both options are disabled by default for new customers; selections made by existing customers on the relevant tables are migrated.

Employee Accumulators

The Import option in the Employee Accumulators program imports yearly amounts for employee deductions or pays.



Click Import to display the Import Yearly Employee Accumulators screen, where you can define the parameters for your import, including the file to import, the form definition to use when processing the import file, and the year and type of the accumulator records you are importing.



The import function imports only yearly records. Unless you are re-importing values for existing yearly records, the function does not update any existing deduction or pay amounts.

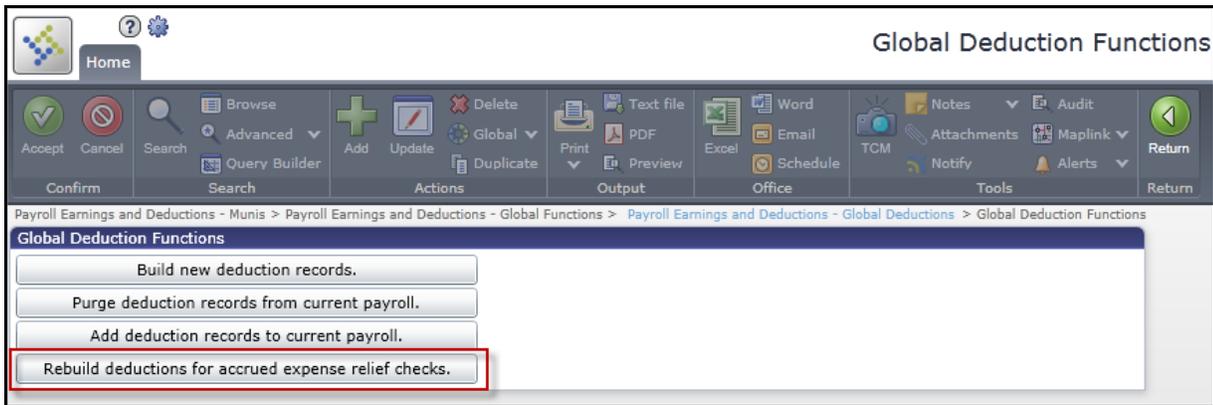
Payroll Control Settings

Category	Setting	Description
General	ESS User Name Format and Sync Mode	This option, when enabled, directs the system to synchronize changes made to an employee's name in Employee Master to that employee's name in ESS. You can select a number of name formats for the synchronization, including first name and last name; first name only; or last name, middle initial, first name.
Generate	Prorate Pay Hours	This option, if enabled, sets calc codes CC11, CC32, CC33, and CC70 to prorate hours by dividing the pay amount by the pay rate.
Generate	Include Escrow Balance on Final Pay	This option, when enabled, sets pay type 5 to determine its final escrow pay amount by adding the remaining escrow balance to the pay amount.
GL Posting	Default Cash Account Project Code	This option, if enabled, allows you to define a project code for the cash account in addition to the general project code.
Time Entry	Use Hours/Days on Teacher Salary Record for Sub	This option, when enabled, sets a substitute teacher's pay rate in Time Entry to that of the teacher for whom they are substituting.
Time Entry	Calculate FLSA By Gen Level Dates	This option, when enabled, allows you to use generate level dates when processing FLSA periods within the Time Entry move process.

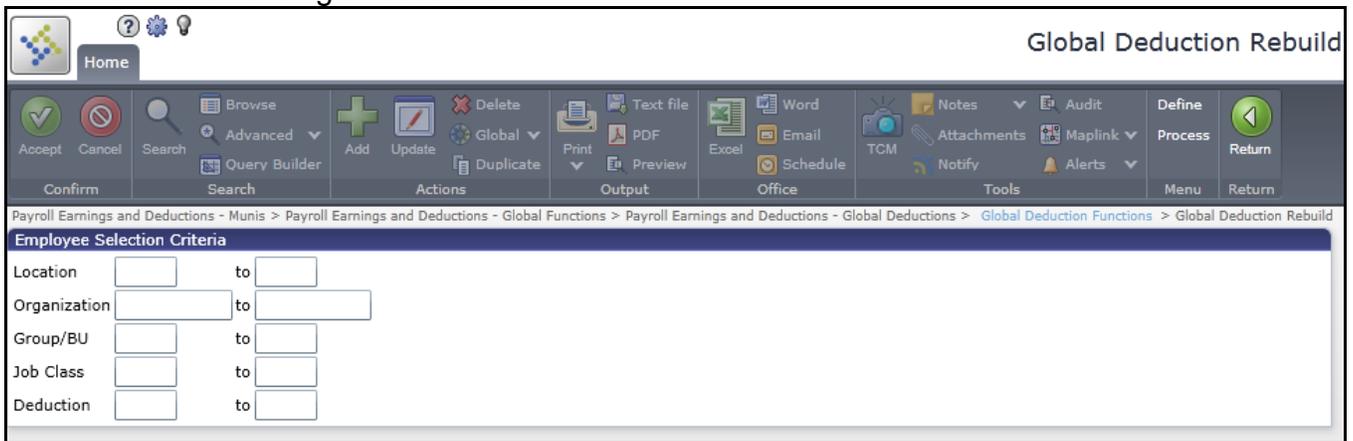
Payroll Earnings and Deductions

The Rebuild Deductions for Accrued Expense Relief Checks option enables you to make changes to deductions on accrued expense relief checks.

To navigate to this option in Payroll Earnings and Deductions, click Global to display the Global Functions screen and then select the Global Access to Deduction Records option to display the Global Deductions screen. On this screen, click Global to display the Global Deduction Functions screen.



Click the Rebuild Deductions for Accrued Expense Relief Checks option and the program displays the Global Deduction Rebuild screen. Use this screen to define which employees to select for the rebuilding of deductions.



Payroll Encumbering

The Deduction Settings group on the Update Remaining Salary/Deduction Amounts screen in the Payroll Encumbering program allows you to create sets of deductions and define encumbrance options for those sets.

Update Remaining Salary/Deduction Amounts - Munis

Payroll Encumbering Functions > Update Remaining Salary/Deduction Amounts - Munis

Earnings Settings

Fiscal Year: 2012

File Update Options:
 Remaining Salary
 Remaining Salary and Position Control

Update Method: R - RECOMPUTE FROM REMAINING PAY PERIODS

Job Class: [] to ZZZZ

Location: [] to ZZZ

Group/BU: [] to ZZZZ

Positions: [] 0 to 999999999

Deduction Settings

Name	Description	Deductions
DEDUCT1	ANNUAL AMOUNTS	Encumbrance Options

These deduction sets and their accompanying encumbrance options are included when you process the update.

New exclusion options are included in the Payroll Encumbrances Proof/Post screen in the Payroll Encumbering program.

Payroll Encumbrances Proof/Post

Payroll Encumbering Functions > Payroll Encumbrances Proof/Post

Run Period: 12
 Run Year: 2012
 Journal ref 1: 2007KS
 Journal ref 2: 2007KS3
 Journal ref 3: 2007KS3
 Comment: MM
 Effective Date: 01/17/2013
 Location: to ZZZ
 Org: 11135000 to 11135000

Exclude inactive employees

Pay Options

Process pays
 Include Pay Types (Leave blank to include all)

 Zero Out Accounts
 Exclude inactive pays

Deduction Options

Process deductions
 Cash Org: ...
 Include Deductions (Leave blank to include all)

 Exclude inactive deductions

- The Exclude Inactive Employees check box excludes inactive employees from the encumbrance posting.
- The Exclude Inactive Pays check box excludes inactive pays from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive pays to exclude. The following options are available:
 - Inactive By Date
 - Inactive By Status
 - Inactive By Both
- The Exclude Inactive Deductions check box excludes inactive deductions from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive deductions to exclude. The following options are available:
 - Inactive By Date
 - Inactive By Status
 - Inactive By Both

Payroll Exceptions

The GL Segment list is available when you add a payroll exclusion with processing code 8 - All Pay Types Included Except with Seg.

The screenshot shows the 'Payroll Exceptions - Munis' application window. The 'Deduction Code' is '1000' and 'FICA'. The 'Processing Code' is '8 - ALL PAY TYPES INCLUDED EXCEPT WITH SEG'. The 'GL Segment' dropdown is open, displaying a list of options: Fund, Function/CC, Department, Program, Grade, Grant/FunSrc, DOE Function, Category, Project, Organization Code, Object Code, and Character Code. Below this is the 'Exclusion Ranges' table with 'From' and 'To' columns.

From	To

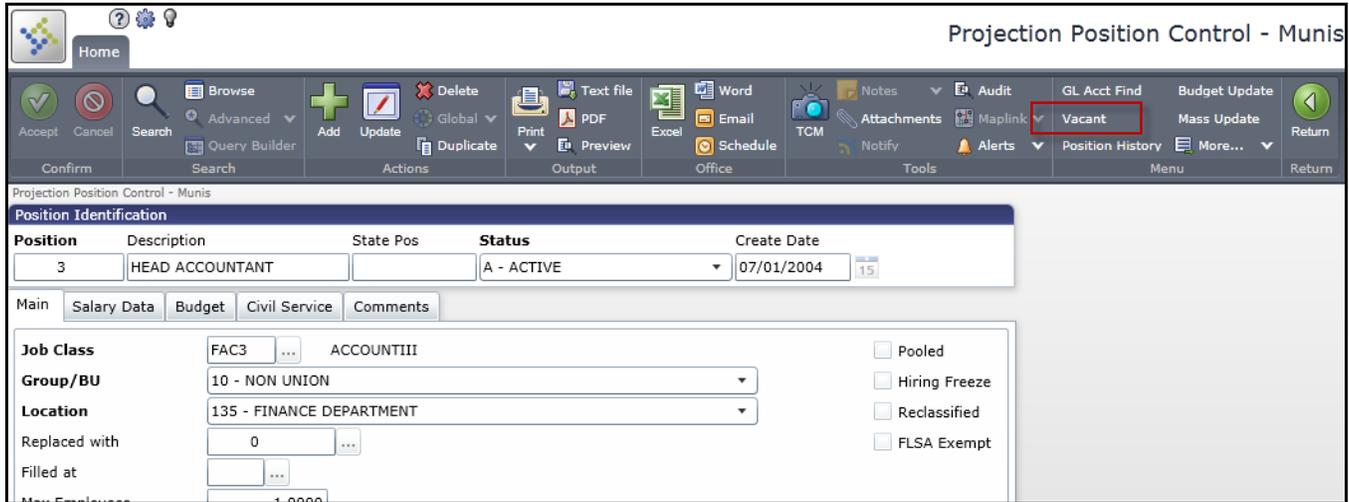
Select a GL Segment type from this list and then use the Exclusion Ranges fields to define the codes to exclude. For instance, if you select the Object Code option from the GL Segment list, then define ranges of Object Codes in the Exclusion Ranges fields.

Salary and Benefit Projections

The following changes apply to Munis Salary and Benefit Projections programs.

Projection Position Control

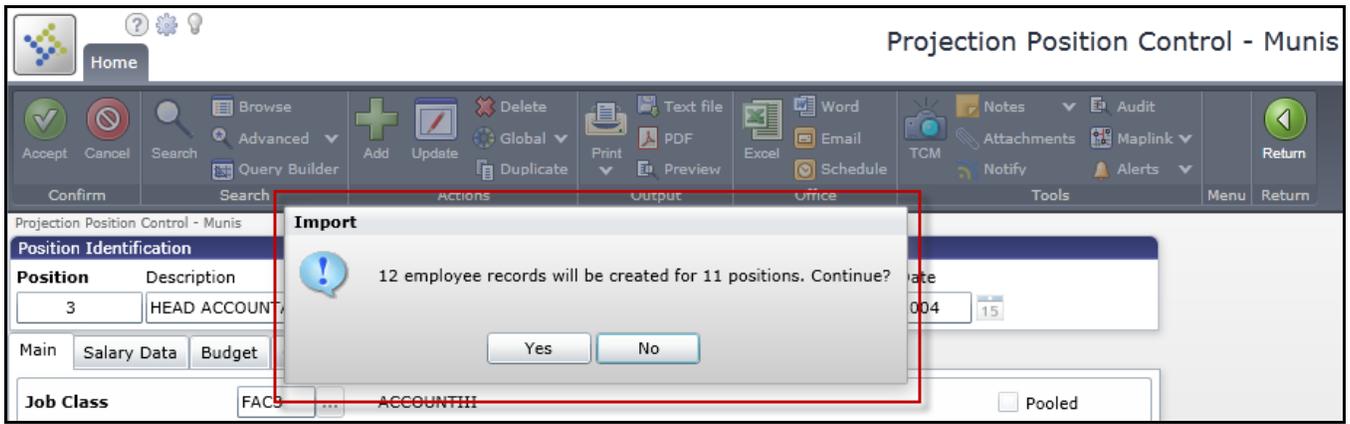
The Vacant process in Projections Position Control generates a proof report.



This report indicates the number of employees created as part of the process and the positions for which they are created.

EMPLOYEE NUMBER	EMPLOYEE NAME	JOB CLASS	LOCATION
000217	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT
000218	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
000219	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
000220	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
000221	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT

The program also displays a dialog box that offers you the option of completing or canceling the operation.



Munis Central Programs

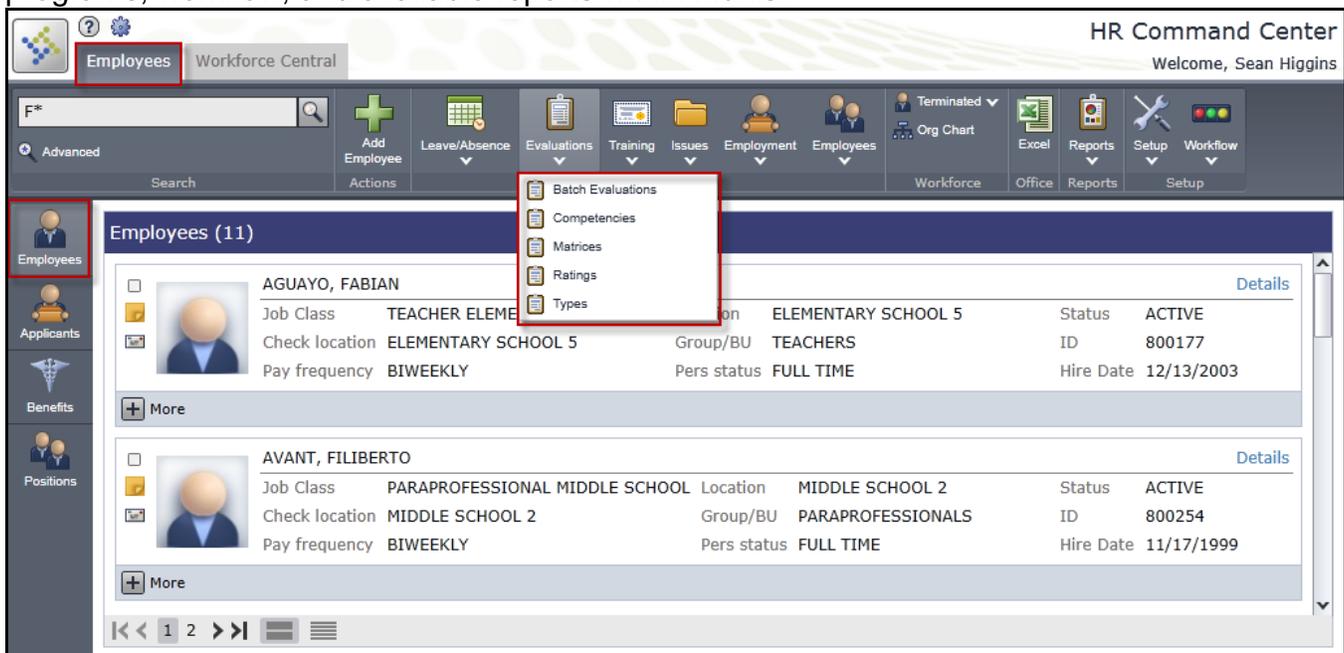
Munis central programs are available from Other Applications menu within Munis. The Centrals menu is organized by product: Financials, HR/Payroll, Revenues, and Administration. The following are HR/Payroll central program enhancements included with Munis Version 10.3.

Important! The Central search programs cap search results at 1000 records. The programs do not provide a message or other indicator when the maximum number of records is reached.

HR Command Center

The Human Resources (HR) Command Center provides a centralized interface for the personnel management central programs. Permissions for the individual programs included in the command center remain as defined for those programs in Munis. The menu options on the left display the Employees, Applicants, Benefits, and Positions panes. For each pane, the ribbon provides options for viewing and maintaining associated data.

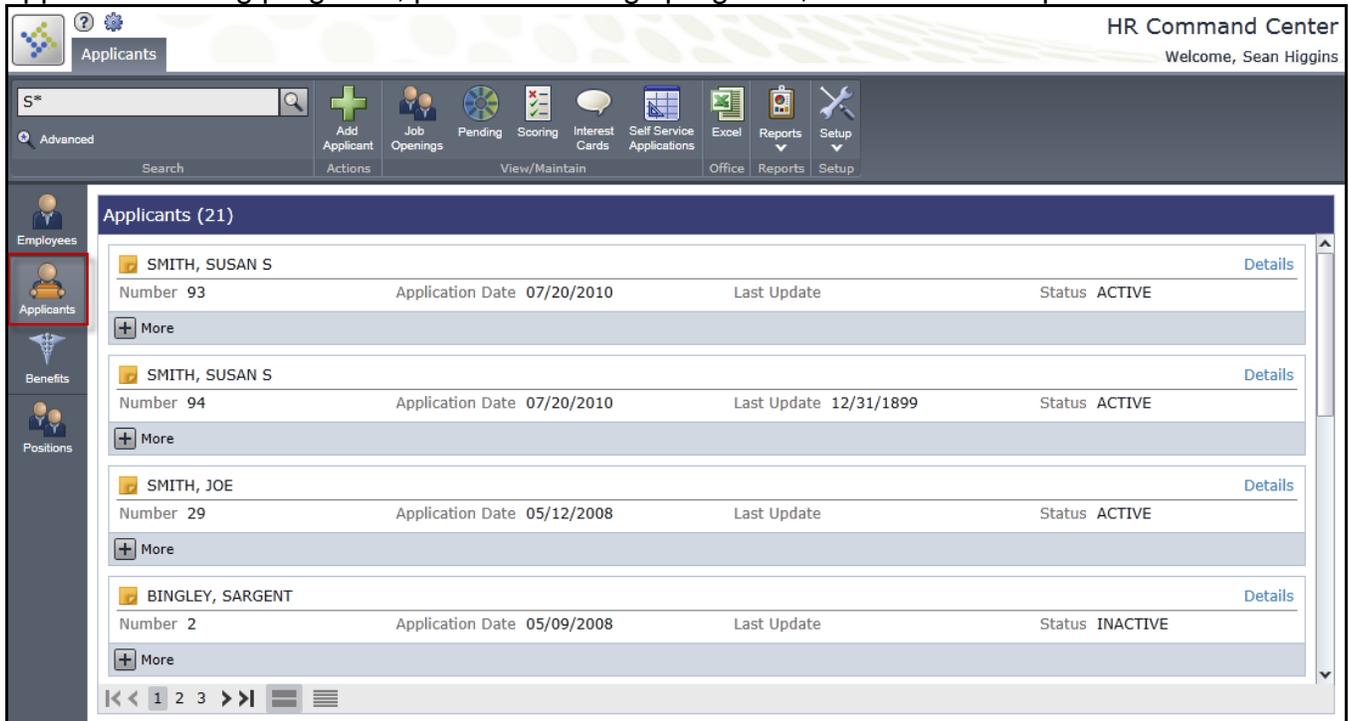
The Employees pane provides general employee data in two views, which can be accessed using the tabs on the ribbon. The Employees view interfaces with the Employee Central program. The options provide direct access to employee programs, pertinent settings programs, workflow, and available reports within Munis.



The Workforce Central view is an interface for the Workforce Central program.



The Applicants pane interfaces with the Applicant Review central program. The options link to applicant tracking programs, pertinent settings programs, and available reports within Munis.



The Benefits pane is an interface for the Benefit Enrollment Monitor central program.

The screenshot shows the 'Benefit Enrollment Monitor' interface. At the top, it says 'HR Command Center' and 'Welcome, Sean Higgins'. Below that, there are search and filter options for 'Type' (Open enrollment), 'Group by' (None), and 'New hire time frame' (30 Days). The main content area is titled 'Enrollees (484)' and features a summary card with 484 total enrollees and a breakdown: 481 Not Started, 1 In Progress, 1 Submitted, 0 Approved, and 1 Posted. To the right, there is a 'My Filters' sidebar with dropdown menus for Position, Location, Job Class, Group/BU, Org, and Enrollment Status, each with a 'Clear' button. At the bottom right of the sidebar, there are 'Apply' and 'Reset' buttons.

The Positions pane interfaces with the Position Control Central program, which displays in two primary views accessible using the tabs on the ribbon. The Positions view includes position control data organized by position record. The options provide direct access to position control programs, pertinent settings programs, and available reports within Munis.

The screenshot shows the 'Positions' pane in the HR Command Center. The main area is titled 'Positions (42)'. A ribbon at the top contains various icons for actions like 'Add Position', 'Transfers', 'Job Classes', 'Salary Tables', 'Encumbering', 'Index Steps', 'Excel', 'Reports', and 'Setup'. A context menu is open over the table, listing options: 'Assignment Start and Status', 'Employees', 'Model', 'Requests', 'Settings', and 'Vacancies'. The table displays two position records:

Position #	Job Class	Location	Pers status	Allocation	Project Allocation	Pos type	Group/BU	Status	Employee	Create Date	EEO class	Object	Project
13505	ACCOUNTANT	FINANCE DEPT				NON UNION	FINANCE DEPT	ACTIVE	Employee	07/01/2004		5110	VACANT
13507	ACCOUNTANT I	FINANCE DEPARTMENT				NON UNION	FINANCE DEPARTMENT	ACTIVE	Employee	07/01/2004		5110	WILLIAMS, ELISE K

The Accounts view displays position account records.

The screenshot shows the HR Command Center interface. The top right corner displays 'HR Command Center' and 'Welcome, Sean Higgins'. The main navigation bar includes 'Positions' and 'Accounts' (highlighted with a red box). Below this is a search bar containing 'accountant' and a toolbar with icons for 'Add Position', 'Transfers', 'Job Classes', 'Salary Tables', 'Encumbering', 'Index Steps', 'Excel', 'Reports', and 'Setup'. The main content area is titled 'Accounts (8)' and displays a list of account records. Each record is expandable, showing details such as Job Class, Location, Allocation, Group/BU, Status, Org, Create Date, Object, and Project. The records shown are for accountants 13505, 13507, 13510, and 13511. The 'Positions' icon in the left sidebar is also highlighted with a red box.

Account ID	Account Name	Job Class	Location	Allocation	Group/BU	Status	Org	Create Date	Object	Project
13505	ACCOUNTANT - SALARIES FULL TIME - CHANGE	ACCOUNTANT I	FINANCE DEPARTMENT		NON UNION	ACTIVE	11135000	07/01/2004	5110	Project
13507	ACCOUNTANT - SALARIES FULL TIME - CHANGE	ACCOUNTANT I	FINANCE DEPARTMENT		NON UNION	ACTIVE	11135000	07/01/2004	5110	Project
13510	ACCOUNTANT II - ACCOUNTS PAYABLE	ACCOUNTANT II	FINANCE DEPARTMENT		NON UNION	ACTIVE	1000	07/01/2004	2010	Project
13511	ACCOUNTANT II - SALARIES FULL TIME - CHANGE									

Central Program Design

Central programs are updated to improve usability and readability. For example, in the Employee Central program, when a search returns multiple results, the program lists each result in a larger format with an expandable information section at the bottom.

Employee Central
Welcome, Sean Higgins

Employees

levesque

Advanced Search

Excel Office

Employees (2)

		LEVESQUE, CECILE	Details			
	Job Class	ACCOUNTANT III	Location	FINANCE DEPARTMENT	Status	ACTIVE
	Work loc		Group/BU	NON UNION	ID	166355
	Pay freq	BIWEEKLY	Pers statu	FULL TIME	Hire Date	07/21/2009
More						
	Home Phone	123-456-7890	Position	HEAD ACCOUNTANT		
	Other Phone	111-111-1111	Supervisor	BISHOP-ELFRING, MAUREEN		
	Address	371 US ROUTE 1 CASCO ME 04015	Emrg Contact	HAROLD LEVESQUE 222-222-2222 OTHER		

		LEVESQUE, MARY	Details			
	Job Class	ACCOUNTANT II	Location	FINANCE DEPARTMENT	Status	ACTIVE
	Work loc		Group/BU	NON UNION	ID	778
	Pay freq	BIWEEKLY	Pers statu	FULL TIME	Hire Date	02/10/2010
More						

When you select the Details option, the program displays the employee's detail page, which displays the employee header in a larger format and provides access to additional information through options in the ribbon.

Employee Central
Welcome, Sean Higgins

Employees

Profile Change | Leave | Terminate | Employee | Qualifications | Employment | History | Excel | Email | Notes | Return To Search | Return

Actions | View/Maintain

 **LEVESQUE, CECILE**
ACCOUNTANT III, FINANCE

- Application Data
- Deduction/Pay
- Actions
- Time & Attendance
- Retro Pay

Available Web Parts

Web parts are web-based portals that display information from various Tyler organizations or provide links to third-party applications. The following table provides a description of web parts available in Munis Version 10.3 for the Tyler Dashboard and Munis tenants.

Web Part	Description
Tyler Dashboard	
My Tyler Community	Provides direct access to Tyler Community items such as forums, conversations, and groups.
Munis	
eLearning Links	Provides a catalog of available Munis eLearning tutorials; when you click a tutorial link, the tutorial opens in a window outside of the Tyler Dashboard.