



## Using Munis

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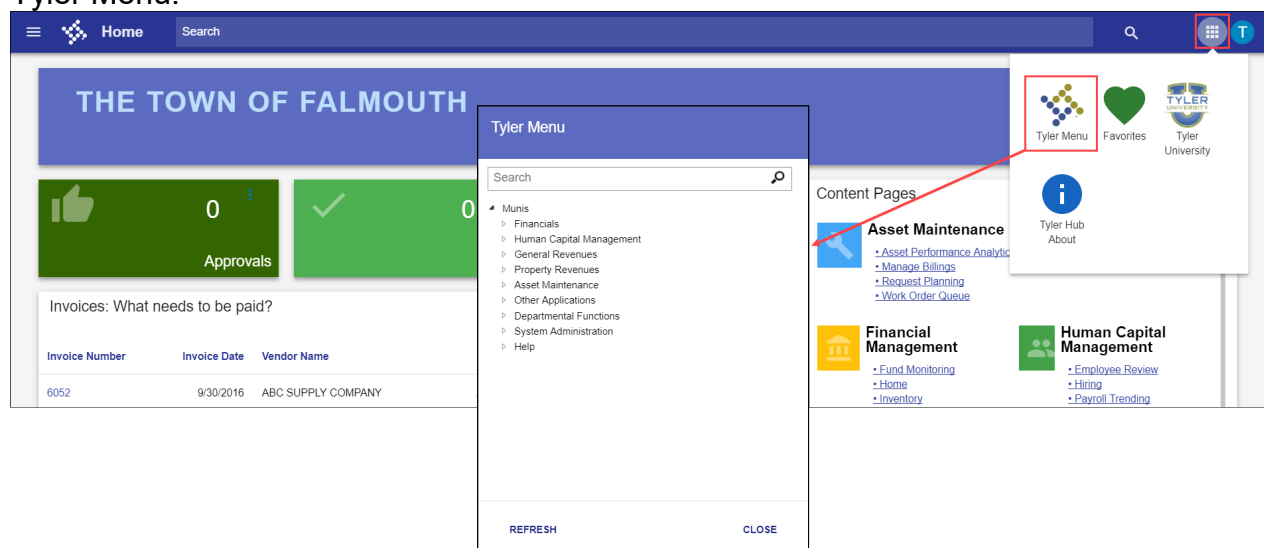
## TABLE OF CONTENTS

<b>Using Munis.....</b>	<b>3</b>
Munis Permissions and Security .....	4
Munis Menus .....	5
Standard Screen Features .....	6
Help and Settings .....	8
Toolbar .....	9
Table Headings .....	13
Finding Records in Munis.....	14
Using Wildcard Characters in Searches .....	14
Using Query (Advanced Search) .....	16
Managing Selected Records .....	17
Browsing Records .....	18
Exporting Records.....	19
Filtering Records.....	19
<b>Reports .....</b>	<b>20</b>
<b>Munis Scheduler.....</b>	<b>20</b>
<b>Saved Reports .....</b>	<b>22</b>
<b>Attach/Tyler Content Manager .....</b>	<b>24</b>
<b>Excel and Word.....</b>	<b>27</b>
Excel.....	27
Word.....	28

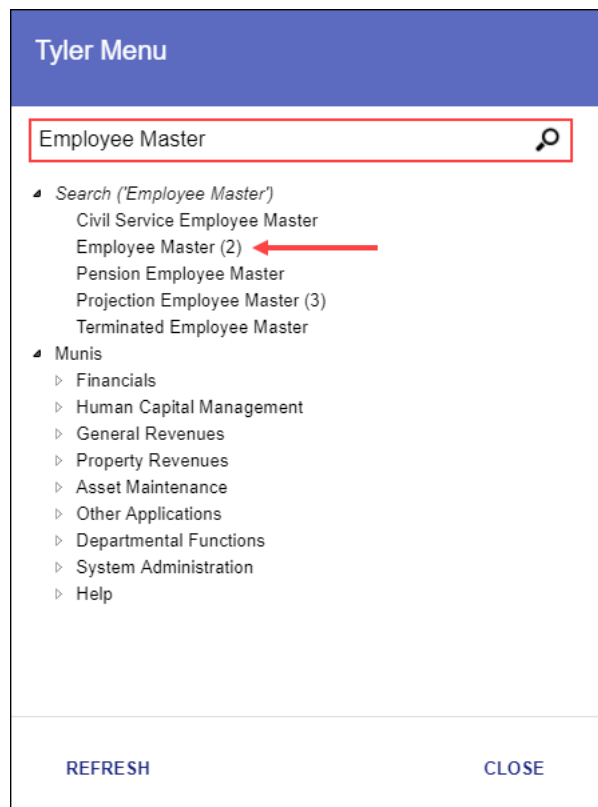
# Using Munis

*Using Munis* provides details for standard Munis® screen, toolbar, and menu options. It also provides an overview of several features that enable you to efficiently manage information within Munis programs.

To display the Munis menu, click the Apps button in the omnibar of Tyler Hub, and then click Tyler Menu.



Using the Search box on the Tyler Menu, you can search for Munis programs by name. When you complete a search, results for multiple instances of the same program are summarized. For example, if there are two instances of an identical Employee Master program on your Munis menu, the search results display Employee Master (2). For programs with identical names that are not identical programs, the search results display the name for each program.

A screenshot of the Tyler Menu search interface. At the top is a blue header bar with the text "Tyler Menu". Below this is a search box containing the text "Employee Master" and a magnifying glass icon. A red rectangle highlights the search box. Below the search box is a list of search results. The first section is titled "Search ('Employee Master')" and contains five items: "Civil Service Employee Master", "Employee Master (2)" (which has a red arrow pointing to it), "Pension Employee Master", "Projection Employee Master (3)", and "Terminated Employee Master". The second section is titled "Munis" and contains a list of program categories: "Financials", "Human Capital Management", "General Revenues", "Property Revenues", "Asset Maintenance", "Other Applications", "Departmental Functions", "System Administration", and "Help". At the bottom of the menu are two buttons: "REFRESH" and "CLOSE".

Tyler Menu

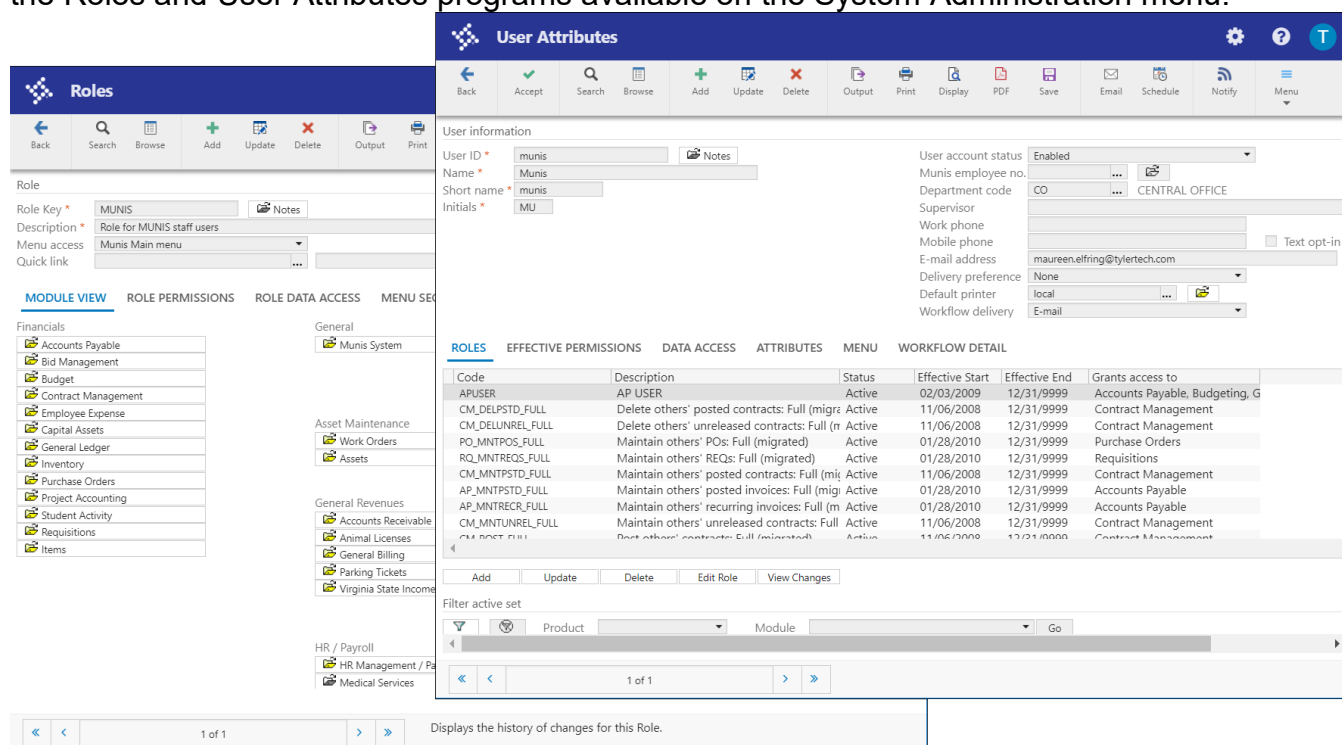
Employee Master

- Search ('Employee Master')
  - Civil Service Employee Master
  - Employee Master (2)
  - Pension Employee Master
  - Projection Employee Master (3)
  - Terminated Employee Master
- Munis
  - Financials
  - Human Capital Management
  - General Revenues
  - Property Revenues
  - Asset Maintenance
  - Other Applications
  - Departmental Functions
  - System Administration
  - Help

REFRESH CLOSE

## Munis Permissions and Security

Permissions and security settings determine the programs and options available to individual Munis users. User permissions and security settings are typically determined by a user's responsibilities as they relate to using the Munis system. For example, an employee who enters payroll information does not necessarily require permissions to access the Tax Billing programs. Permissions and security settings are maintained by system administrators using the Roles and User Attributes programs available on the System Administration menu.



**Roles**

Role Key: MUNIS  
Description: Role for MUNIS staff users  
Menu access: Munis Main menu  
Quick link: ...

**MODULE VIEW**

Financials

- Accounts Payable
- Bid Management
- Budget
- Contract Management
- Employee Expense
- Capital Assets
- General Ledger
- Inventory
- Purchase Orders
- Project Accounting
- Student Activity
- Requisitions
- Items

General

- Munis System

Asset Maintenance

- Work Orders
- Assets

General Revenues

- Accounts Receivable
- Animal Licenses
- General Billing
- Parking Tickets
- Virginia State Income

HR / Payroll

- HR Management / Payroll
- Medical Services

**User Attributes**

User information

User ID: munis  
Name: Munis  
Short name: munis  
Initials: MU

User account status: Enabled  
Munis employee no.: ...  
Department code: CO CENTRAL OFFICE  
Supervisor: ...  
Work phone: ...  
Mobile phone: ...  
E-mail address: maureen.elfring@tylertech.com  
Delivery preference: None  
Default printer: local  
Workflow delivery: E-mail

**ROLES**

Code	Description	Status	Effective Start	Effective End	Grants access to
APUSER	AP USER	Active	02/03/2009	12/31/9999	Accounts Payable, Budgeting, G
CM_DELPSTD_FULL	Delete others' posted contracts: Full (migr)	Active	11/06/2008	12/31/9999	Contract Management
CM_DELUNREL_FULL	Delete others' unreleased contracts: Full (migr)	Active	11/06/2008	12/31/9999	Contract Management
PO_MNTPPOS_FULL	Maintain others' POs: Full (migrated)	Active	01/28/2010	12/31/9999	Purchase Orders
RQ_MNTPREQS_FULL	Maintain others' REQs: Full (migrated)	Active	01/28/2010	12/31/9999	Requisitions
CM_MNTPSTD_FULL	Maintain others' posted contracts: Full (migr)	Active	11/06/2008	12/31/9999	Contract Management
AP_MNTPSTD_FULL	Maintain others' posted invoices: Full (migr)	Active	01/28/2010	12/31/9999	Accounts Payable
AP_MNTPREC_FULL	Maintain others' recurring invoices: Full (migr)	Active	01/28/2010	12/31/9999	Accounts Payable
CM_MNTPUNREL_FULL	Maintain others' unreleased contracts: Full (migr)	Active	11/06/2008	12/31/9999	Contract Management

Filter active set

Product: Module: Go

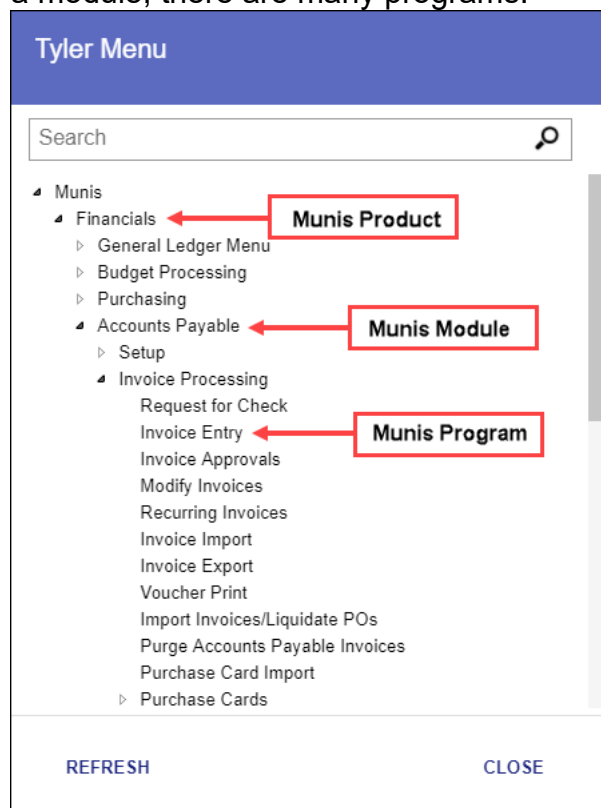
1 of 1

Displays the history of changes for this Role.

## Munis Menus

In Munis, menus are available according to the security permissions granted to your user role. Typically, permissions are granted according to need. For example, if your primary job is to enter timesheets in Payroll, then the System, Financials, and General Revenues menu options may not be available.

Menus are divided by Munis products, and then by modules within those products. For example, Financials is a product and Accounts Payable is a module within that product. Within a module, there are many programs.



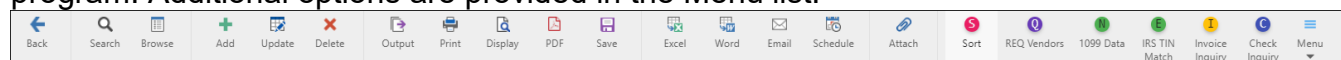
## Standard Screen Features

The standard Munis program screen contains several working sections, including a header, a toolbar, and a navigation bar.

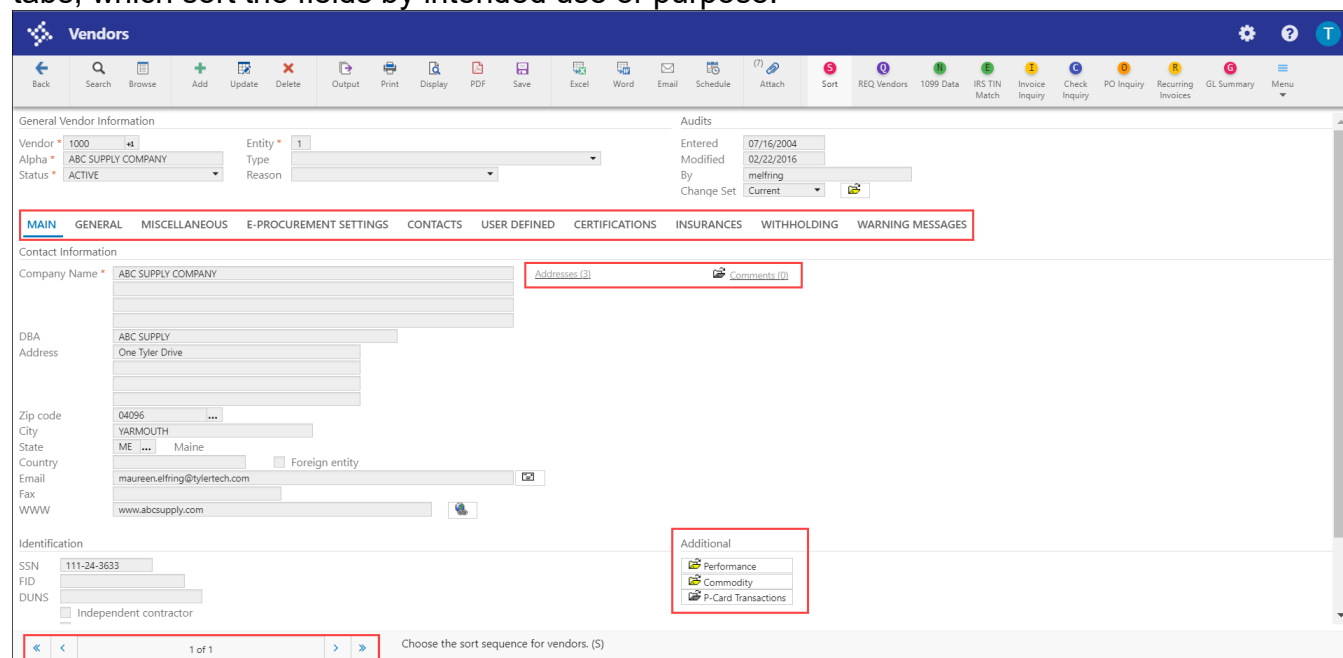
At the top of the screen, the header includes the Tyler logo, the name of the program, and the Settings, Help, and User buttons.



Directly under the header is the Munis toolbar. The toolbar provides all the options that allow you to perform various actions throughout the individual Munis programs. The Munis toolbar updates according to the options available within the active program screen. To the left, the toolbar provides the standard options available for adding or maintaining records and reporting; to the right, the toolbar provides the options specific to managing data in the active program. Additional options are provided in the Menu list.



The work area for a Munis program is centered on the screen and contains the fields required to complete program actions. Often, if there are numerous fields, the work area is divided into tabs, which sort the fields by intended use or purpose.



**Vendors**

General Vendor Information

Vendor \* 1000 Entity \* 1

Alpha \* ABC SUPPLY COMPANY Type

Status \* ACTIVE Reason

Audits

Entered 07/16/2004

Modified 02/22/2016

By melfring

Change Set Current

**MAIN** GENERAL MISCELLANEOUS E-PROCUREMENT SETTINGS CONTACTS USER DEFINED CERTIFICATIONS INSURANCES WITHHOLDING WARNING MESSAGES

Contact Information

Company Name \* ABC SUPPLY COMPANY [Addresses \(3\)](#) [Comments \(0\)](#)

DBA ABC SUPPLY

Address One Tyler Drive

Zip code 04096

City YARMOUTH

State ME Maine

Country ☐ Foreign entity

Email maureen.elfring@tylertech.com

Fax

WWW www.abcsupply.com

Identification

SSN 111-24-3633

FID

DUNS

☐ Independent contractor

Additional

[Performance](#)

[Commodity](#)

[P-Card Transactions](#)

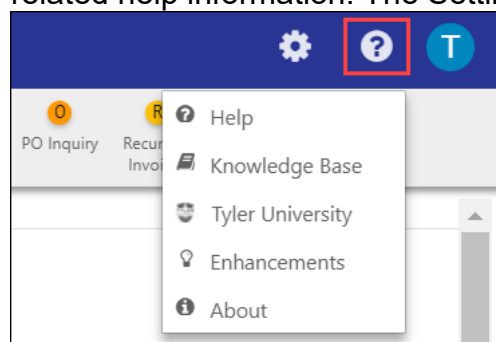
1 of 1 Choose the sort sequence for vendors. (S)

The navigation bar at the bottom of the screen allows you to move through an active set of records, one record at a time, or to move directly to the first or last record of the set.

On-screen buttons and links provide access to information that is specifically related to the active record. For example, in the Vendors program, the Addresses and Comments links, along with the Performance and Commodity buttons, provide access to details specific to the selected vendor record.

## Help and Settings

In the program header, the Help button provides access to online help content, as well as to related help information. The Settings button provides access to individual program settings.



The Help button provides access to Munis online help content, the Munis KnowledgeBase, Tyler University, program enhancements, and version details.

- **Help**—Provides screen-level help for programs and subprograms throughout the Munis applications. A typical help screen includes an overview, a list of procedures, a field descriptions table, and links to additional resources.
- **Knowledge Base**—Provides resource documentation for all Munis products. When you access the knowledgebase using the Help button, the resulting search screen automatically displays a list of documents related to the active program. When you access the knowledgebase from the Help menu, knowledgebase search functionality is not available.
- **Tyler University**—Initiates an interactive help session that guides you through a selected process. When you click Tyler University, the program displays a How Can We Help You? dialog box that provides a list of actions for which guidance is available for the selected program.
- **Enhancements**—Provides a link to current enhancement notes that are applicable to the active program. This feature is enabled on the General tab of the System Settings > Site Settings program.
- **About**—Accesses program, system, and environment information, which is useful when initiating a phone call to Munis Technical Support. A technical support specialist may ask you to click this button to identify the version of the software you are using. Munis programs operate differently, or have different features, depending on which version you are using. Knowing which version of the software you are currently using enables Munis Technical Support to tailor solutions to your specific needs.

Settings provides the Customize Screen Form, View Database Columns, and GBC Settings options:

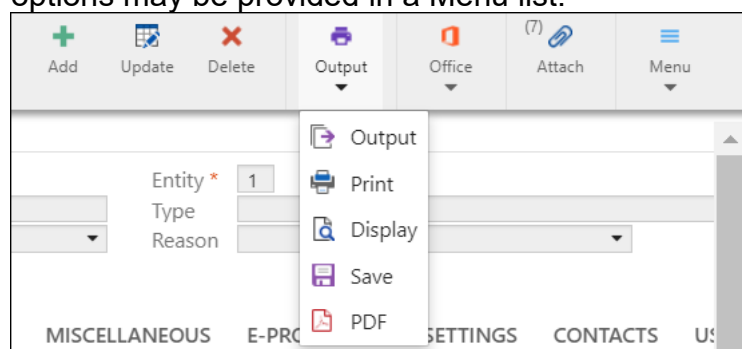
- **Customize Screen Form**—Allows system administration personnel to customize the text and ToolTips found on standard Munis screens. This option is only available if the Customize Munis Screen Forms check box on the Munis System Roles screen is selected for at least one role assigned to your user ID.



- **View Database Columns**—Allows you to view the database headers for the fields on the screens. This option is only available if the Allowed to View Database Detail check box in Munis System Roles is selected for at least one role assigned to your user ID.
- **GBC Settings**—Clears personal settings for features such as hidden columns, column layout, and sort order.











## Toolbar









The available buttons on the Munis toolbar adjust according to the functionality offered on the active screen. For example, a search screen will display only those buttons applicable to finding a record, whereas a reporting screen will provide output buttons. Furthermore, the toolbar dynamically adjusts to condense options based on the size of the window. Depending on your display, output options may be provided in a single Output list, and program-specific options may be provided in a Menu list.







The following table provides descriptions for common Munis toolbar buttons.

Button	Description
Accept ✓	Accept saves information after you have created or updated a record. This button typically displays when you are adding, updating, or searching for records.
Add +	Add enters a new record into the database. When you click Add, entry fields become available with the cursor positioned in the first field. The program may place default values in fields to save you keystrokes, but typically you can replace the defaults. You can move from one field to the next by pressing Tab, by using the arrow keys, or by placing the cursor in a field. When the cursor is in a field, helpful information often displays at the bottom of the screen. Some fields have an additional field help button that lists available entries.
Advanced 🔍	Advanced provides advanced searching options. Click the down arrow to access the advanced options available in the active program.
Alerts 🔔	Alerts allow you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute emails at specified dates as a reminder of upcoming events or activities that require attention. Reminder alerts are established using the Alert Administration programs on the System Administration menu. The Alert programs are not available for use with all Munis programs. Click the down arrow to manage alerts.

Button	Description
Attach 	<p>Attach allows you to view, add, or delete documentation related to the current record.</p> <ul style="list-style-type: none"> <li>If your organization uses Tyler Content Manager (TCM), the Attach option provides the Document Mappings screen, from which you can add or view documents using TCM.</li> <li>If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you can add or access documentation from your Munis server. Once a file is attached, it is copied and stored with the Munis program. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files.</li> </ul> <p><b>Note:</b> The Attach option is available only if the View Attachments and Associated Documents check box is selected in the Roles–Munis System program. If this check box is not selected, the Attach button is not accessible.</p>
Audit 	<p>Audit provides the audit history for the selected record.</p>
Back 	<p>Back returns you to the main menu if you are currently viewing a primary program screen, or to the previous screen if you are viewing a secondary program screen.</p>
Browse 	<p>Browse is available when an active set of records exists, or after an active set is created using the Search or Define buttons. The browse screen displays a list of all the records in the active set. You can sort, view, or export data from the browse screen. The Excel button exports the data directly to a Microsoft® Excel spreadsheet.</p>
Cancel 	<p>Cancel ends an operation, such as adding or updating a record.</p>
Delete 	<p>Delete removes the currently displayed record or set of records from the program. If the record is being used by another process, you cannot delete it. Once you delete a record, you cannot recover it.</p>
Display 	<p>Display allows you to immediately preview a report on the screen.</p>
Duplicate 	<p>Duplicate creates a copy of data and creates a new record in the same program using the original data as a base. Once you duplicate data, you can modify the new record.</p>
Email 	<p>Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, the Munis program opens and displays the linked record.</p>
Excel 	<p>Excel exports the active set of records to a Microsoft® Excel spreadsheet.</p> <ul style="list-style-type: none"> <li>If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application.</li> </ul>

Button	Description
	<ul style="list-style-type: none"> <li>If you click Excel from a master program or subprogram screen, the program displays the Export Filter screen. Use this screen to specify the data field values to export to Microsoft Excel. When you click Save and Exit, the program opens Microsoft Excel with the selected data in the active worksheet.</li> </ul> <p>In each case, the program inserts hyperlinks to the individual Munis records. The file created during export is automatically saved in the directory where the Munis software is installed; use the Save As feature in Excel to save the file to a new location.</p>
MapLink 	MapLink allows integration of map data sources with Munis programs. The web-based version of MapLink is an inquiry-only version. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session.
Notes 	Notes provides the option to add or update notes for the selected record. Click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
Notify 	Notify provides integration with Tyler Notify, which allows you to contact Munis customers by telephone or email using predefined content. <b>Note:</b> This feature is only available if your organization has implemented Tyler Notify.
Output 	Output displays the Output dialog box, which features a list of available printers and print settings.
PDF 	PDF creates the report in PDF format. The program opens the document in the installed PDF reader. <b>Note:</b> The PDF button is only accessible if the Output to PDF permission is granted in Munis System Roles for at least one role assigned to your user ID.
Print 	Print sends a report directly to your default printer. Default printers are established for your user ID in the User Attributes program.
Query 	Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard (similar to the expression builders found in Microsoft Excel or Microsoft Access) allows you to create an expression based on the fields in the active program.
Save 	Save creates the report and saves it as a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. You can access Saved Reports by clicking Saved Reports in the Departmental Functions group of the Munis menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
Schedule	Schedule displays the Appointments screen, which allows you to schedule

Button	Description
	meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message that contains meeting start and end times, and a meeting description. You can define the meeting times and modify the description, as appropriate. When the email recipient accepts the meeting, it is automatically added to his or her Microsoft Exchange calendar.
Search 	Search locates records in a program. Search is often used to create an active set of records before proceeding to another step, such as printing a report, purging records, or posting invoices. In many cases, you can use wildcard characters to further define a search.
Update 	Update adds data or changes existing data in a record. You can change data in any active field. Fields that are not active typically are part of the record key. The key is the field or combination of fields that uniquely identifies the record from all other records. If you need to change data in a key field, you must delete the record and enter it again.
Word 	Word creates an active set of records to export to Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing. An additional feature of Microsoft Word Export is Mail Merge. This feature enables you to print professional forms, mailing labels, directories, and so on with user-defined templates.

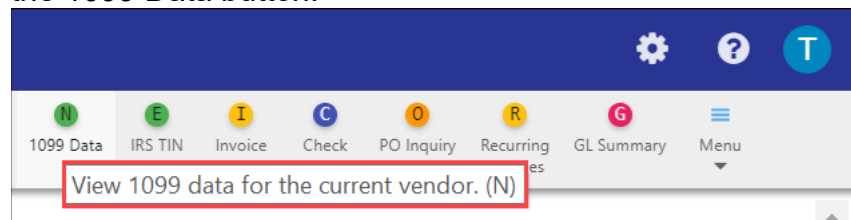
### Keyboard Shortcuts

Some actions in Munis can be completed using the keyboard. The following table provides a description of available shortcuts.

Available Keyboard Shortcuts	
Shortcut	Action
Enter	Saves the active record.
Esc	Cancels changes to the active record.
Tab	Moves forward to the next available field; press <b>Shift+Tab</b> to move back to a previous field.
Space Bar	<ul style="list-style-type: none"> <li>Clears or selects check boxes.</li> <li>Displays available options in a list field. Use the up and down arrows to move through the options; press <b>Enter</b> to select an option.</li> </ul>
Ctrl+U	Initiates Update mode for the current record.
Ctrl+F	Initiates the Search process.
Ctrl+D	Deletes the active record or set of records.
Ctrl+B	Provides a browse screen of the active set of records.
Ctrl+Down Arrow	Moves to the next record in an active set.
Ctrl+Up Arrow	Moves to the previous record in an active set.
Ctrl+Right Arrow	Moves to the last record in an active set.
Ctrl+Left Arrow	Moves to the first record in an active set.

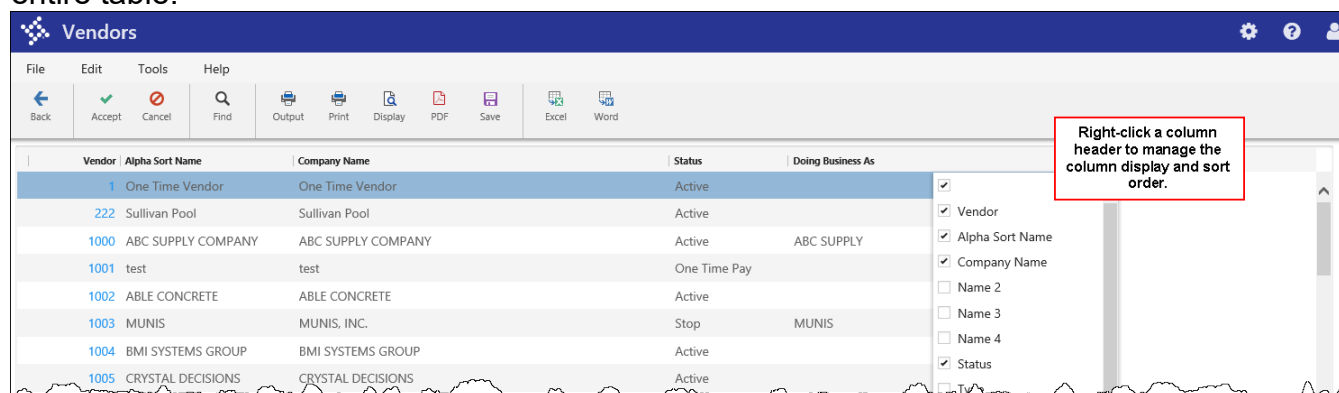
## Program-specific Shortcuts

For program-specific options, the toolbar provides keyboard shortcuts. When you hover your pointer over an option, the ToolTip includes the keyboard shortcut. For example, the 1099 Data shortcut in the Vendors program is identified as (N), which is also the letter indicated on the 1099 Data button.

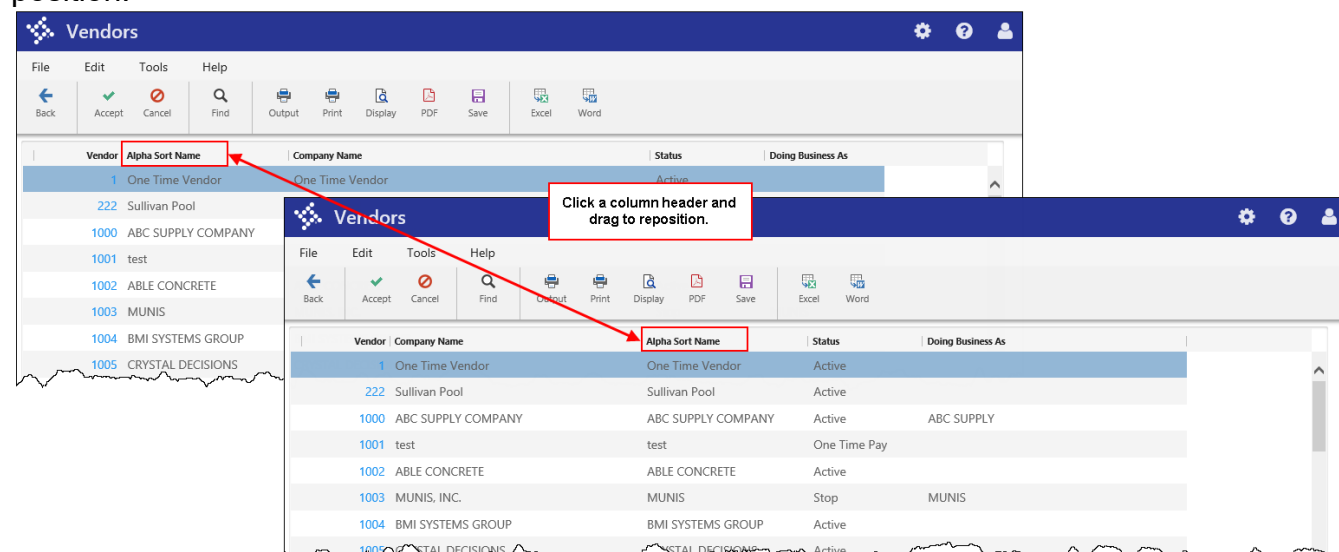


## Table Headings

On browse screens and in other instances where Munis provides information in a table format, the column headers for tables include column display and sort order options. To define the columns that display or to reset the sort order, right-click a column heading. Select or clear check boxes to add or remove items from the display, or use the options provided to reset the entire table.



Within a table, to change the order of columns, click a column header and drag it to a new position.



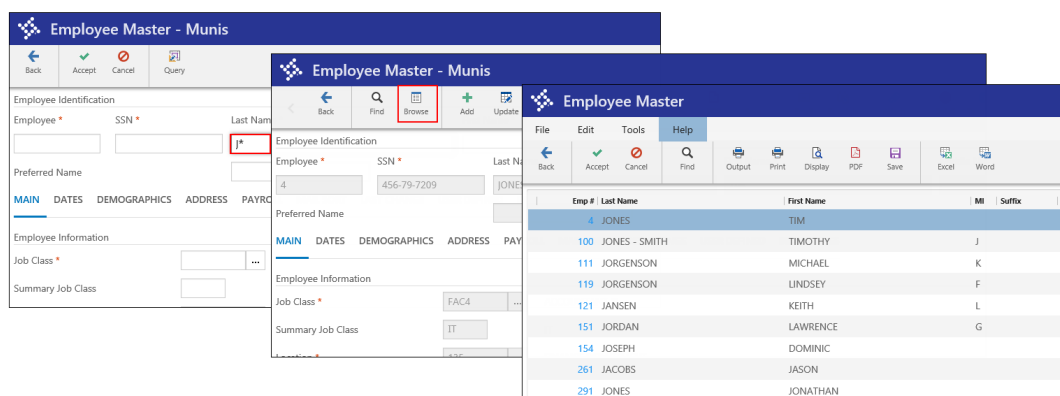
## Finding Records in Munis

There are several ways to find existing records in Munis programs. Most commonly, click **Search** on the toolbar, complete the available fields, and then click **Accept** to create an active set of records that match the search criteria. If you click Search, leave all the fields blank, and then click Accept, you create an active set of all records stored for that program.

For the most efficient search, be sure to complete the key or required fields on the screen. Key and required fields are identified by asterisks (\*).

### Using Wildcard Characters in Searches

Wildcard characters are symbols that refine your search criteria or provide a substitute for unknown values. Boxes where you can type characters or numerals accept wildcard characters. For example, in a Name field, if you type “J” and use the asterisk (\*) wildcard character, the program finds all names that begin with “J”.



In this case, the program displays the first record in the active set of records matching the search criteria. Click **Browse** on the toolbar to view a list of all results.

In programs such as the Bank Codes program, enter “\*Bank\*” in the Name field to find all records with the word “Bank” in the name. Using the asterisk before and after the word finds all banks, including those that begin with the word “Bank” (for example, Bank of America) and those that end with the word “Bank” (such as National Bank).

The greater than (>) and less than (<) symbols are often used in date boxes when you are trying to find records before or after a certain date. For example, to find all records that have been added to a program on or since January 1, 2005, type >=01/01/2005 in the date box.

The following table provides a list of wildcard characters and their descriptions.

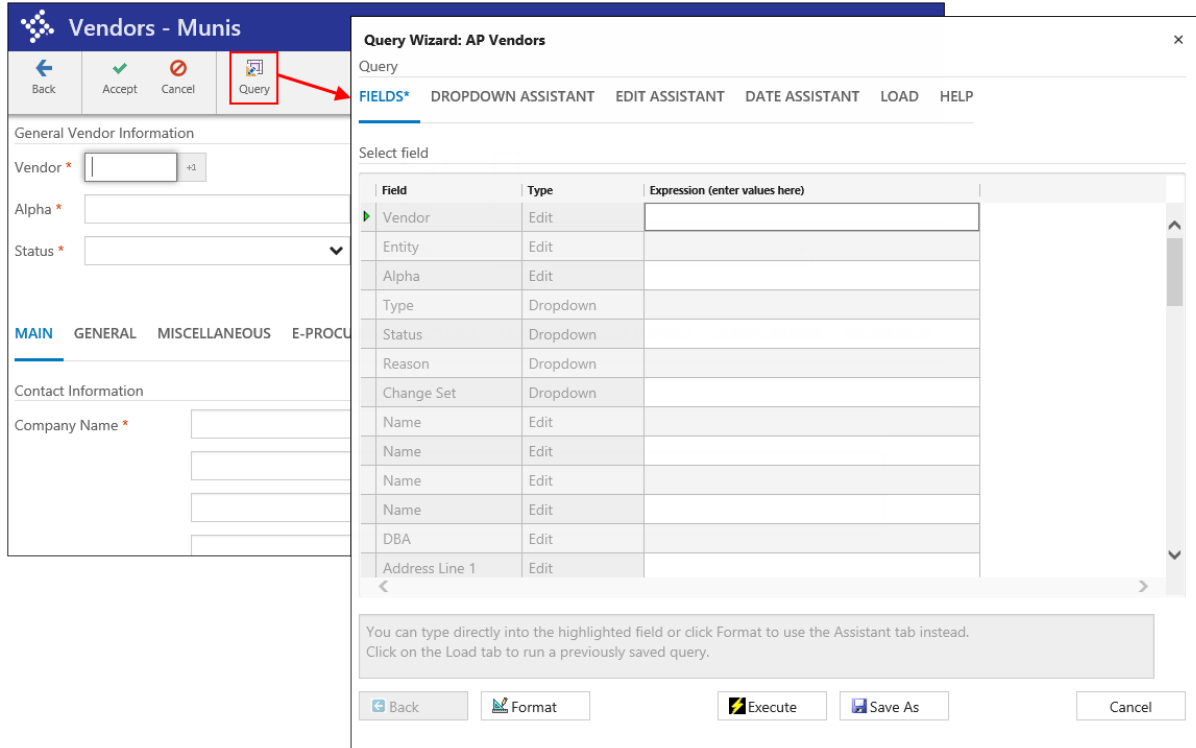
Symbol	Description
=	is null Use to find records that have a NULL in a field.
= or ==	equal to Use to find records that are equal to the value typed in the box. For example, typing =ME in the State box finds records with a value of ME.
<	less than

Symbol	Description
	Use to find records with a value less than the data typed in the box. For example, typing <L finds data from A–K.
<=	less than or equal to Use to find records with a value less than or equal to the data typed in the box. For example, typing <=L finds data from A–L.
>	greater than Use to find records with a value greater than the data typed in the box. For example, typing >L finds data from M–Z.
>=	greater than or equal to Use to find records with a value greater than or equal to the data typed in the box. For example, typing >=L finds data from L–Z.
<> or !=	not equal Use to find records with values not equal to the data typed in the box. For example, typing <>1 finds all records where the value is not equal to 1.
<!	less than ASCII (33) Use to find records that have a space in a field.
: or ..	range Use to find records based on data between and including two limiting characters. For example, typing A:C finds Alabama, Bermuda, California. Typing a:c finds account, bank, credit.
	or Use to find records with this value or that value. For example, typing Cash Charge finds all records where the value equals Cash, if it exists, and all records where the value equals Charge, if it exists.
*	wildcard Use to find all records with the same sequential character string that begins, includes, or ends with an asterisk (*). For example, typing ARL* finds all records starting with ARL, such as ARLBERG, ARLINGTON, ARLON, and so on. Typing *H finds all records ending with H such as SMITH, WORTH, and so on.
?	single-character wildcard Use to find all records with the same sequential character string where only a single-character differs. For example, typing A?C finds all records where the value equals AAC, ABC, ACC, ADC, AEC, and so on.
[c]	a set of characters Use to find all codes, as follows: <ul style="list-style-type: none"> <li>• Start with N or T: [NT]*</li> <li>• Start in lowercase: [a-z]*</li> <li>• Start in uppercase: [A-Z]*</li> </ul> Use to find all two-character codes, as follows: <ul style="list-style-type: none"> <li>• Start in lowercase: [a-z]?</li> <li>• Start in uppercase: [A-Z]?</li> </ul>



## Using Query (Advanced Search)

Query creates a query based on the fields in the active program. It enables you to create queries in fields in which you cannot perform a simple search, such as fields with multiple selections. The Query button is only accessible after you click Search.



**Query Wizard: AP Vendors**

Query

**FIELDS\*** DROPDOWN ASSISTANT EDIT ASSISTANT DATE ASSISTANT LOAD HELP

Select field

Field	Type	Expression (enter values here)
Vendor	Edit	
Entity	Edit	
Alpha	Edit	
Type	Dropdown	
Status	Dropdown	
Reason	Dropdown	
Change Set	Dropdown	
Name	Edit	
Name	Edit	
Name	Edit	
Name	Edit	
DBA	Edit	
Address Line 1	Edit	

You can type directly into the highlighted field or click Format to use the Assistant tab instead.  
Click on the Load tab to run a previously saved query.

Back Format Execute Save As Cancel

List expressions are formatted by inserting a vertical bar (|) between each item. Range expressions are formatted by inserting a colon (:) or two periods (..) between two values, or by using greater than (>), less than (<), equal to (=), or a combination of these symbols (for example =>10 returns all values equal to or greater than 10).

The Load tab stores queries for specific programs so that you can use them again. For screens that allow for multiple searches, use concise descriptions for saved queries in order to make it clear which queries are appropriate for each search. When you save a query, click Accept on the toolbar prior to executing the query, then type a description of the query in the prompt that the program displays. By default, saved queries are available to all users. If the Make Public check box is not selected on the Save As screen, then only the user who created the query may access it.

To create a query:

1. Click **Search** on the toolbar.
2. Click **Query Builder**.

The program opens the Query Wizard program with the Fields tab displaying the fields and the type of fields in the active program.



3. Type an expression directly into the Expression column or click the Format option to open the Edit Assistant, Dropdown Assistant, or Date Assistant tab.  
Query Wizard opens the appropriate assistant for the type of field you are querying.
4. Build an expression:
  - List expression.  
Add items to include in your list expression.
  - Range expression.  
Select the low value and high value for the range.  
Click the Switch option to change between the range expression and the list expression.
5. Click **Format** again.  
The list or range expression you created appears in the Fields tab.
6. Click **Execute** to display the new active set of records created by the query.

To save a query for use later, click **Save As** from the Fields tab or one of the Assistant tabs. Once you have created a query, you can view or select it using the Load tab.

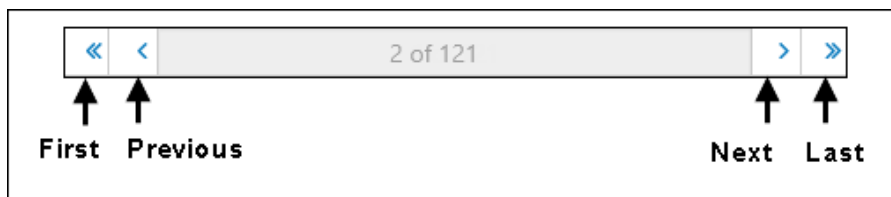
To remove an item from the Select List of Items on the Dropdown Assistant tab, double-click the item or press **Enter** to remove the item from the list.

**Note:** When you save a query, the program checks the entered description to see if it matches one that you have already entered. (This check is not case-sensitive.) If the descriptions are the same, you can save the new query in place of the old one. You cannot save a public or private query with a description that another user has already used for a public query.

### Managing Selected Records

An active set consists of records with information matching your search criteria. You create an active set when you complete a search that produces multiple records that you can navigate and view.

At the bottom of a program screen, a navigation bar displays the number of the record that you are currently viewing, the total number of records, and options to assist you with navigation. You can view records in the active set one at a time or you can click Browse on the navigation bar to view a list of all records in the active set. In the following example, you are viewing record 2 of 121.



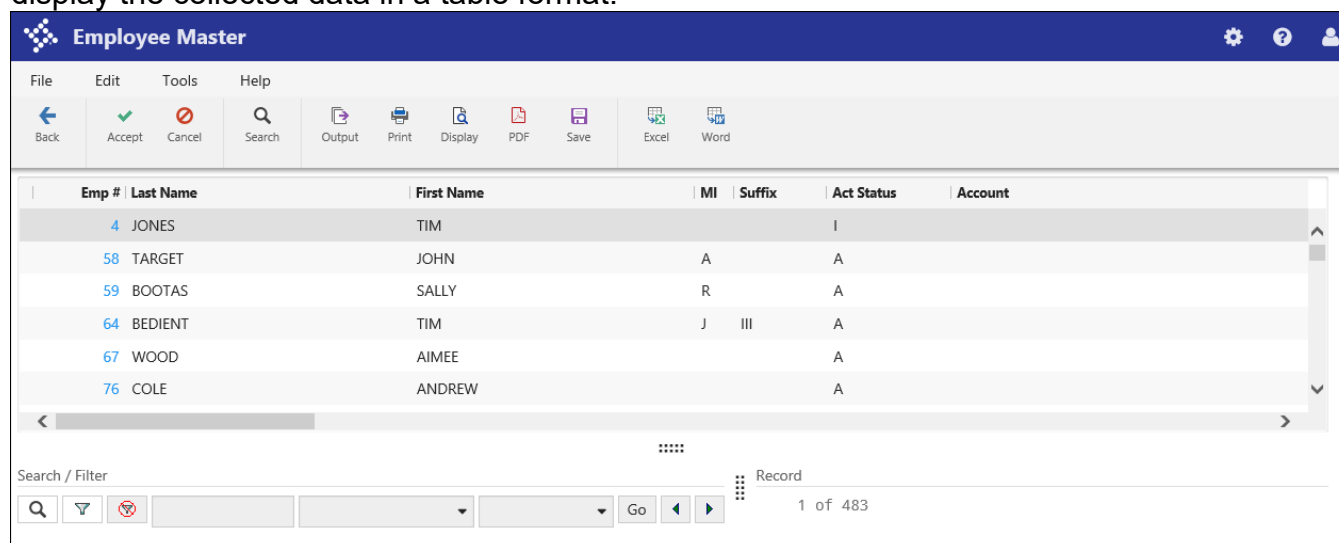
To navigate the active set of records:

- Click **First** to view the first record in the active set (record 1).
- Click **Previous** to view record 1 of 121.
- Click **Next** to view record 3 of 121.
- Click **Last** to view the last record in the active set (record 121).

The active set remains active until you perform another search or close the program.

## Browsing Records

Once you have created an active set of records within a Munis program, click **Browse** to display the collected data in a table format.



The screenshot shows the 'Employee Master' application window. It has a menu bar (File, Edit, Tools, Help) and a toolbar with icons for Back, Accept, Cancel, Search, Output, Print, Display, PDF, Save, Excel, and Word. Below the toolbar is a table of employee records. The table has columns: Emp #, Last Name, First Name, MI, Suffix, Act Status, and Account. The records are as follows:

Emp #	Last Name	First Name	MI	Suffix	Act Status	Account
4	JONES	TIM			I	
58	TARGET	JOHN	A		A	
59	BOOTAS	SALLY	R		A	
64	BEDIENT	TIM	J	III	A	
67	WOOD	AIMEE			A	
76	COLE	ANDREW			A	

At the bottom of the window, there is a 'Search / Filter' section with a search icon, a filter icon, a dropdown menu, and a 'Go' button. To the right of this is a 'Record' section showing '1 of 483'.

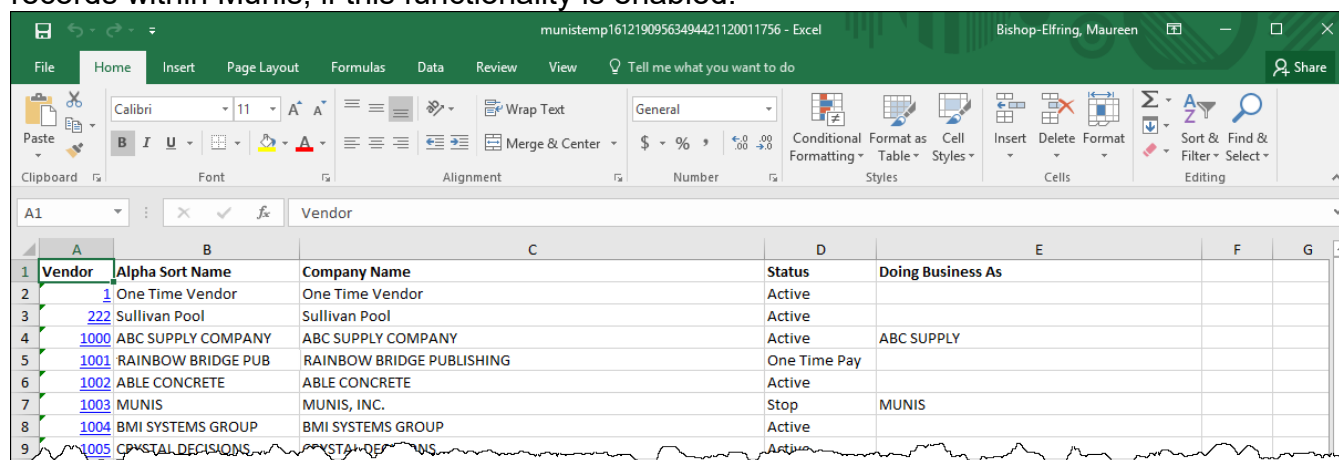
You can display or hide columns, and sort, export, or filter the data to create a more specific data set:

- To display or hide columns, right-click the column headings. Select the boxes to display the columns; clear the boxes to hide them. Click outside the heading list to display your selections in the revised format. When you create an output file or report from a browse screen, hidden columns do not display.
- To sort the data, click the column heading that you want to use as the sort key; the data sorts in ascending order. If you click the column header again, the data sorts in descending order.
- To resize columns, position your pointer at the bar between column headings, and then click and drag the bar to the right or left.

Once you have the records selected and sorted, use the output options on the toolbar to view, print, or save a report of the records; click **Word** to export the records to Microsoft Word or click **Excel** to export the records to Microsoft Excel.

## Exporting Records

When you click Excel on a standard browse screen, the program exports the active set of records to a Microsoft Excel spreadsheet. The Excel spreadsheet includes hyperlinks to the records within Munis, if this functionality is enabled.

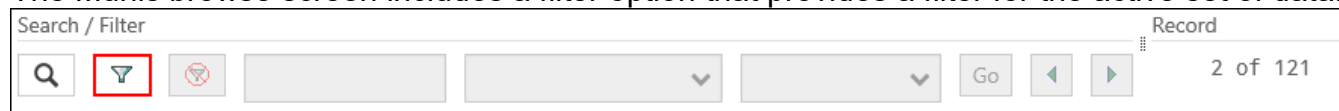


Vendor	Alpha Sort Name	Company Name	Status	Doing Business As
1	One Time Vendor	One Time Vendor	Active	
222	Sullivan Pool	Sullivan Pool	Active	
1000	ABC SUPPLY COMPANY	ABC SUPPLY COMPANY	Active	ABC SUPPLY
1001	RAINBOW BRIDGE PUB	RAINBOW BRIDGE PUBLISHING	One Time Pay	
1002	ABLE CONCRETE	ABLE CONCRETE	Active	
1003	MUNIS	MUNIS, INC.	Stop	MUNIS
1004	BMI SYSTEMS GROUP	BMI SYSTEMS GROUP	Active	
1005	CPASTAL DECISIONS	CPASTAL DECISIONS	Active	

If you do not have the correct version of Excel, the program displays a message that directs you to save the file to your workstation.

## Filtering Records

The Munis browse screen includes a filter option that provides a filter for the active set of data.



To filter data:

1. Click the Filter button.
2. Enter filter data. Use wildcards such as the asterisk (\*), less than (<) symbol, or greater than (>) symbol; use <> or != for 'not equal to'.
3. Choose the field on which to filter the data.
4. Click **Go** to apply the filter.  
If you filter the data such that no records are found, the previous results remain on the screen, and the program displays the following message: "Clearing filter, no records found."
5. Click **OK** to continue.

### Notes:

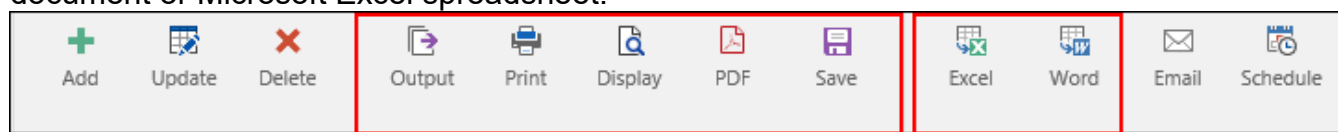
- Filters are not case-sensitive.
- Filter results are 'equal to' for date or numeric columns, and 'contains' for character columns (unless you include special characters such as >=).
- Totals, which can be any mix of sum, average, minimum, or maximum value, are recalculated for any filter.
- Format strings may obscure a column's true value, especially with 'float' types. For example, the true value might be 345.67, but the column might only show '345'. If you

created a filter '=345', this record would not be included because the filter would see the true 345.67 value, even though the user would not, because of a format string with no decimals showing.

- The asterisk (\*) wildcard character can be used with character columns. Using wildcards with numeric or date columns is allowed, but may lead to unpredictable results.

## Reports

In many Munis programs, you can generate a report by creating an active set of records and then using the output buttons on the toolbar to view, print, or save the report. If the Word or Excel buttons are active within a program, you can also export the report to a Microsoft Word document or Microsoft Excel spreadsheet.



When you select Display, the program provides the report in HTML format with no page breaks.

The Output button provides several output options, which vary depending on the program. If the program is integrated with ReadyForms™, additional options are available to submit the data to the ReadyForms application.

## Munis Scheduler

From the Inquiries and Reports menus and from within many Munis programs, you can create reports of stored data and records. The Munis Scheduler program works with the reporting features to allow you to process reports at scheduled times.

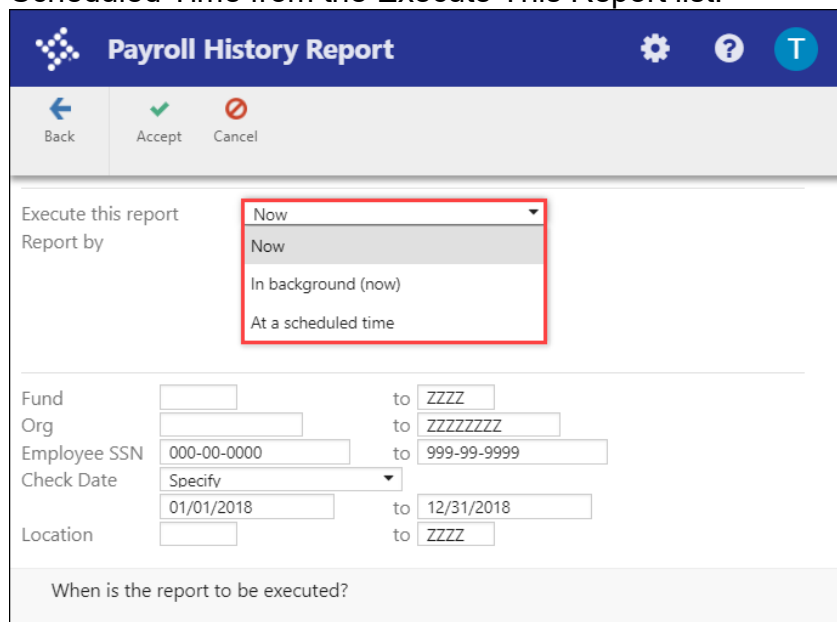
To use Scheduler, the Enable Scheduling check box must be selected in the Scheduler Engine program, and Scheduler privileges must be assigned by your system administrator. To receive email alerts, a correct email address must be included in the user record.

Munis Scheduler saves a copy of the import, export, or report criteria established at the time specified for the scheduled import, export, or report. Jobs scheduled to run on the thirty-first of each month run on months with 31 days. To schedule a job to run at the end of every month, select Daily, Monthly, or similar options from the date lists in programs.

If your organization uses Tyler Content Manager, you can store reports in the Tyler Content Manager database. If you have the appropriate permissions, you can also include a link to the document in the notification email. You must have the TylerCM Single Document Viewer installed in order to include document links in notification emails.

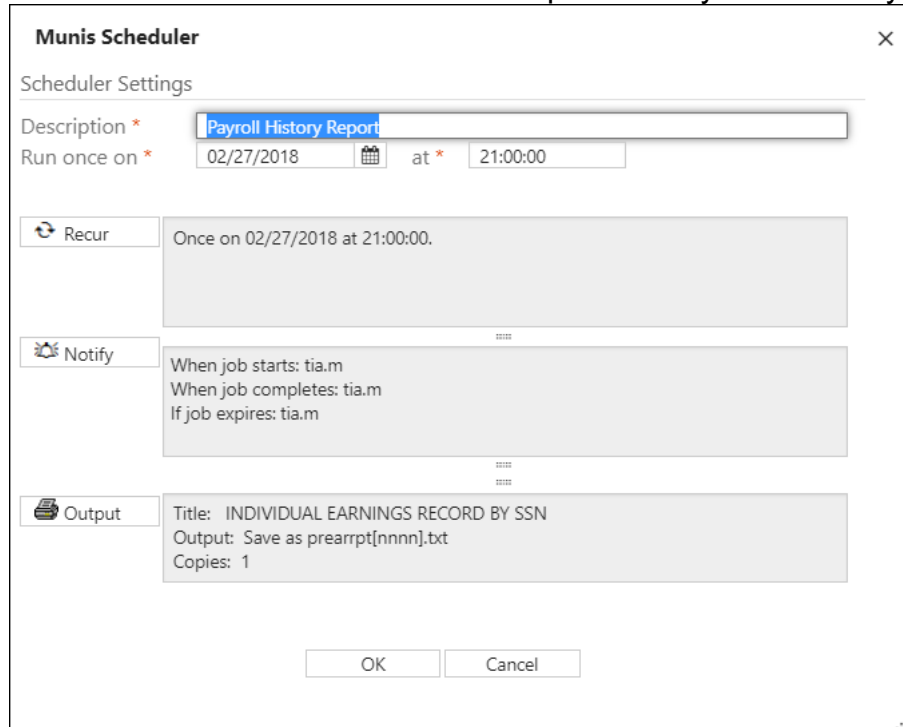
Once the system administrator has enabled Scheduler privileges for you, programs that are enabled to work with Scheduler display the Execute This Report list. The Execute This Report list has three options: Now, In Background (Now), and At a Scheduled Time.

To create a report without using Munis Scheduler, select Now from the Execute This Report list, and then select on output button in the toolbar to create the report in the appropriate format. To create the report using Munis Scheduler, select In Background (Now) or At a Scheduled Time from the Execute This Report list.



The **Payroll History Report** dialog box features a toolbar with **Back**, **Accept**, and **Cancel** buttons. Below the toolbar, the **Execute this report** section includes a dropdown menu with options: **Now**, **In background (now)**, and **At a scheduled time**. The **Report by** section contains input fields for **Fund**, **Org**, **Employee SSN** (000-00-0000), **Check Date** (Specify, 01/01/2018 to 12/31/2018), and **Location**. The bottom section is labeled **When is the report to be executed?**

When you select **In Background (Now)** or **At a Scheduled Time**, the program displays the **Munis Scheduler** screen. The **Recur** option is only available if you select **At a Scheduled Time**.



The **Munis Scheduler** dialog box contains the following sections:

- Scheduler Settings:** Includes a **Description \*** field (Payroll History Report) and a **Run once on \*** field (02/27/2018 at 21:00:00).
- Recur:** A button to toggle recurring execution. The text below indicates: "Once on 02/27/2018 at 21:00:00."
- Notify:** A button to configure notifications. The text below indicates: "When job starts: tia.m", "When job completes: tia.m", and "If job expires: tia.m".
- Output:** A button to configure output. The text below indicates: "Title: INDIVIDUAL EARNINGS RECORD BY SSN", "Output: Save as prearrpt[nnnn].txt", and "Copies: 1".

At the bottom are **OK** and **Cancel** buttons.

In the **Scheduler Settings** fields, define the report and establish the one-time processing date and time. Click **Notify** to update the notification triggers and recipients for the Scheduler



When you open the Saved Reports program, click **Search** to create a list of all the files available in the spool directory.

On the Search Results screen, click **Display Reports** on the toolbar to view a selected file or files; the report displays a Display Options box. In this box, select No Filter to view all the files, select Use Page Ranges to view only specific pages, or Use Line Ranges to view only specific lines. Select the files to display. If you selected Use Page Ranges or Use Line Ranges, complete the Start and End boxes with the page or line numbers that you want to view for each file. Click **Select All** to select all the files, or click **Select None** to clear all your selections.

To display PDF files, click **Text as PDF**. When the program displays a list of files, click **Select All** to select all reports in the list, or select the individual check boxes for those reports to view. Click **Select None** to clear all the check boxes.

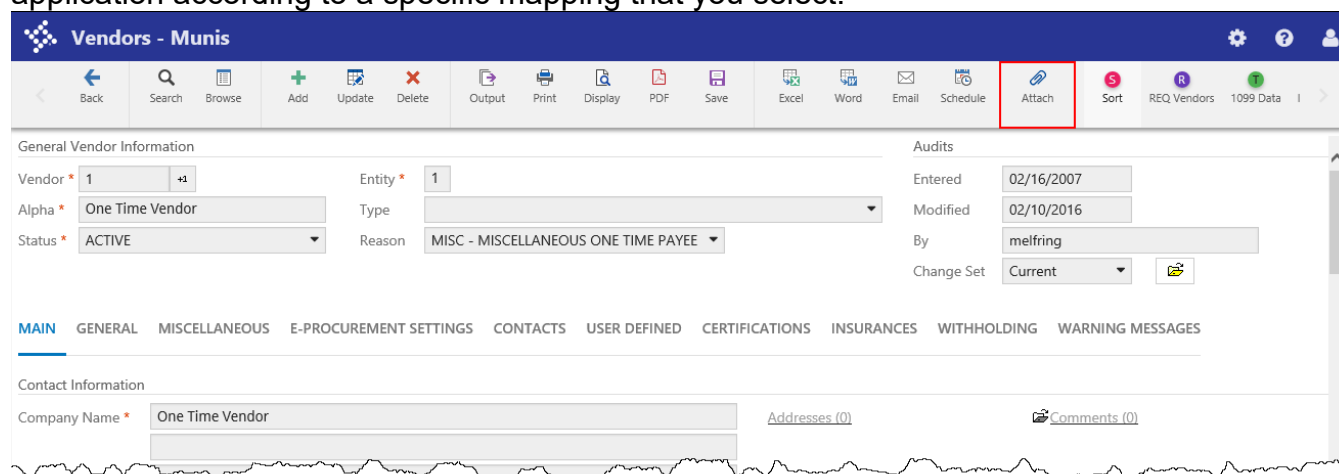
To print reports, find the report or reports to print, and then click **Print Reports**. The program provides print options; for example, you can print whole documents, specific page ranges, or specific line ranges. You can also define the number of copies to print, the format (landscape or portrait), and the printer.

Click **Select All** to select all the reports in the list, or click **Select None** to clear the check boxes.

# Attach/Tyler Content Manager

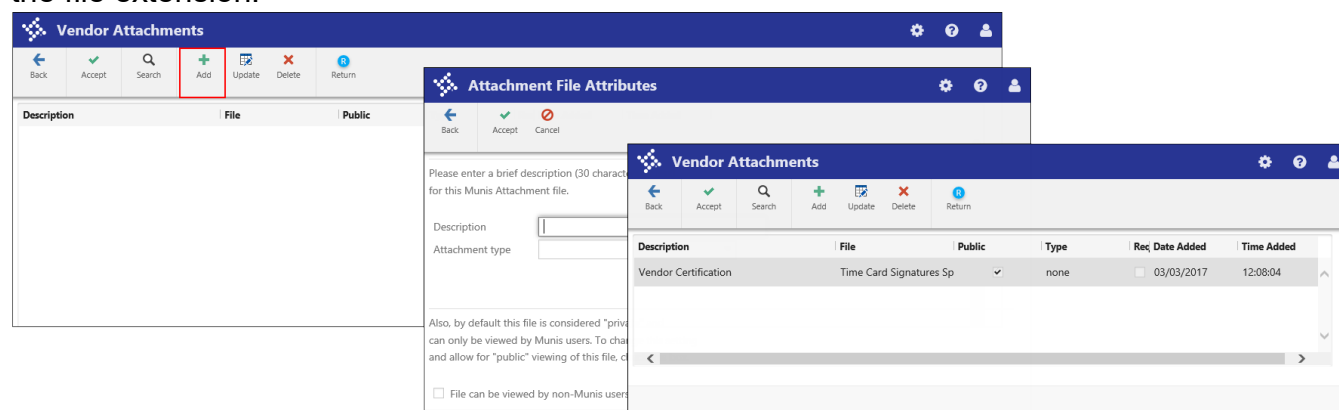
The Attach option allows you to attach documents to a Munis record. The View Attachments and Associated Documents check box in the Roles–Munis System program restricts access to the Attach button on the toolbar. If this check box is not selected, the Attach option is not available.

If your organization uses standard Munis attachments, the documents are stored on your server; if your organization uses Tyler Content Manager, the document is stored within that application according to a specific mapping that you select.



To attach a document using the standard Munis server, click **Add** on the Attachments screen, complete the File Upload dialog box, and then navigate to the file to upload the document. Once you have selected the file, the program displays a File Attributes screen, where you enter a document title that displays on the Attachments list and determine if the document should be available from other applications, such as Munis Self Service.

The file name extensions for the files you can attach to programs are established in the System Miscellaneous Codes program. File names can contain up to 64 characters, including the file extension.





To remove an attachment, click **Attach** on the toolbar, highlight the document to remove from the Attachments screen, and click **Delete**. To view an attachment, click **Attach**, highlight the document to view, and click **Accept**.

To attach a document using Tyler Content Manager, click Attach to display the Document Mappings screen.

Document Mappings

Attachment Documents

Attachment Type	Document Type	Read Only	Count	Required
Vendor Attachment: General	Vendor Attachment		N/A	
Vendor Attachment: E-Verify	Vendor Attachment		N/A	

Maintain

Associated Documents

Document Title	TCM Document Type	Read Only	Count
1099-G	1099-G	✓	N/A
1099-I	1099-I	✓	N/A
1099-M	1099-M	✓	N/A
1099-S	1099-S	✓	N/A
Vendor W-9	Vendor W-9		N/A

Maintain

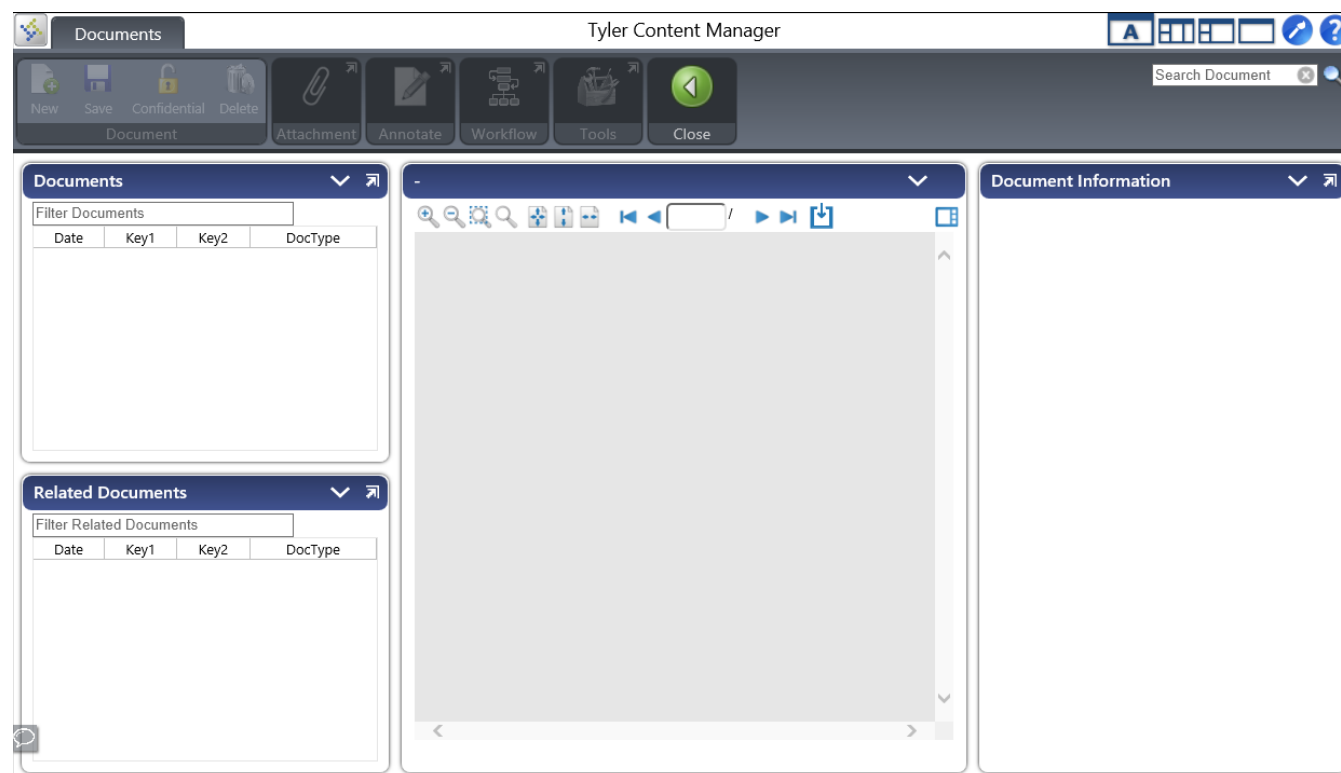
View Documents

TCM Version: 2017.1.1.0

☒ Show Counts

When you double-click a document type from the Attachment Type list to add a document using that document type, or you double-click a document title from the Associated Documents list to add a document for that category, Tyler Content Manager opens. Click New in TCM to complete the attach process.

**Note:** You can only use the associated document for which the Read Only check box is not selected.



For more information on using Tyler Content Manager, access the Munis KnowledgeBase and from the Topic list, select Tyler Content Manager.

## Excel and Word

The Excel and Word options export Munis data to a Microsoft Excel spreadsheet or Word document. To use the Word and Excel options, you must also have Microsoft Word and Microsoft Excel installed on your computer.

### Excel

When you create a report within a program, or when you are completing a specific report or inquiry program, the Excel toolbar button exports collected data into Excel columns, where you can manipulate the data according to your requirements.

The Export Filter defines the values to include in the export. For example, if you create an active set of data in the Employee Deductions program and click Excel, the program displays the Export Filter with a list of all the available fields.

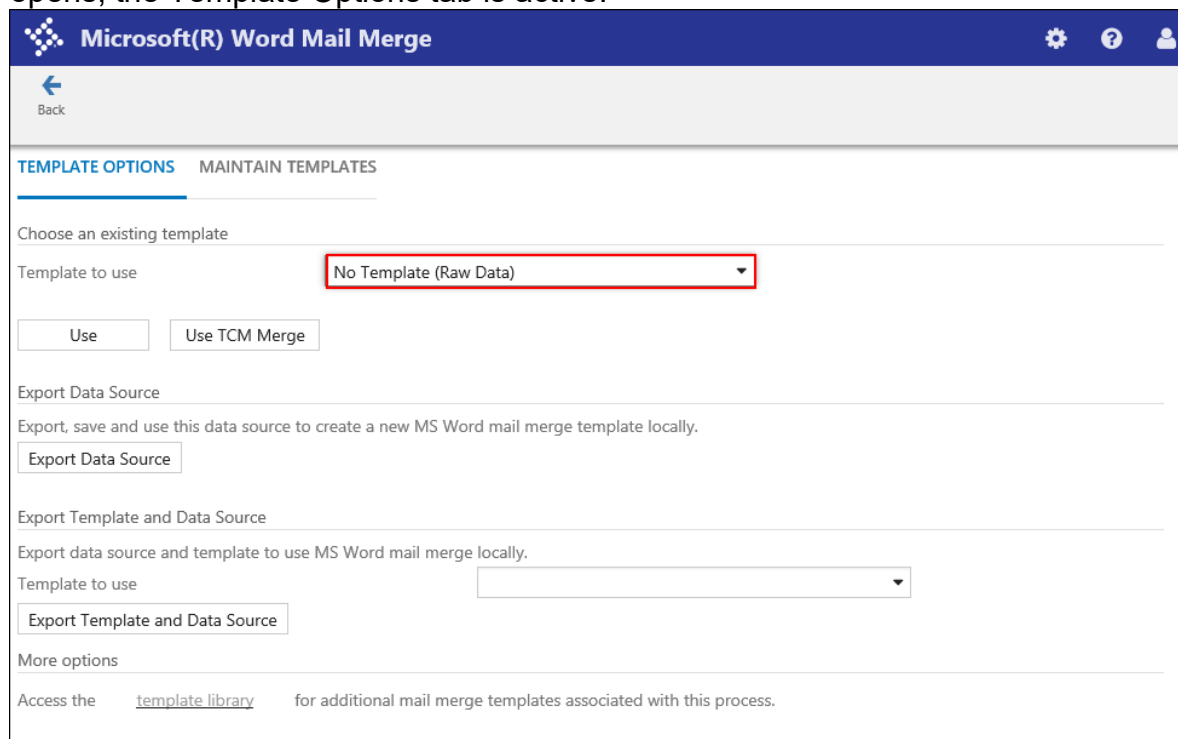
Select or clear the check boxes for the fields to include in the export, and then click **Save and Exit** to export the files and open Microsoft Excel. The program opens Microsoft Excel with the exported records as the active file. If the Enable Hyperlinks check box on the Export Filter screen is selected, the file includes hyperlinks to the records in Munis.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Employee	Last Name	First Name	Middle Initial	Status	Location	Deduction	Bank	Ins. Carrier	Ins. Carrier Desc	Ins. Plan	Ins. Plan Desc
2	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">1000</a>					
3	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">1100</a>					
4	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">2300</a>		DELT	DELTA DENTAL	HMO	HMO
5	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">2700</a>		PRUD	PRUDENTIAL	PPO	PPO
6	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">3000</a>					
7	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">4000</a>					
8	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">5000</a>					
9	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">5001</a>					
10	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">7000</a>					
11	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">7050</a>					
12	<a href="#">4</a>	JONES	TIM		A	177	<a href="#">8015</a>		PRUD	PRUDENTIAL	IND	INDIVIDUAL

If you select Excel from a Munis browse screen, the Export Filter is not available. In this case, the program exports the selected data directly to Microsoft Excel.

## Word

Word exports the active set of records into Microsoft Word Mail Merge. When Mail Merge opens, the Template Options tab is active.



Microsoft(R) Word Mail Merge

Back

TEMPLATE OPTIONS MAINTAIN TEMPLATES

Choose an existing template

Template to use No Template (Raw Data)

Use Use TCM Merge

Export Data Source

Export, save and use this data source to create a new MS Word mail merge template locally.

Export Data Source

Export Template and Data Source

Export data source and template to use MS Word mail merge locally.

Template to use

Export Template and Data Source

More options

Access the [template library](#) for additional mail merge templates associated with this process.

The Template to Use list provides a list of available templates for reports. To export records directly into a Microsoft Word document, select No Template (Raw Data) from the list, and then click **Use**. Microsoft Word opens with the selected report as the active document. The file created during export is automatically saved in the directory where the Munis software is installed. Click **Save As** from the File menu in Word to save the file to another directory.

The Use TCM Merge button is available when your organization uses Tyler Content Manager (TCM) and a Microsoft Windows® Server. When you click this button, the program displays the Defined Mappings screen, which allows you to use a TCM template for the document and to archive the document to TCM.

The Export Data Source delivers a data file only (CSV) file to the client PC. When you select this option, the browser offers to open the file after its receipt. If you choose this option, the file opens in MS Excel; however, the intended use of the feature is that after downloading, you open Microsoft Word to start a mail merge, pointing to the data file as your source.

The Export Template and Data Source group provides the Template to Use and Export Template and Data Source button. When you select a template and then click the export Template and Data Source button, the program creates a .ZIP file that contains the Word template document and an Excel file of the data in .CSV format. This allows you to modify the template on your local PC and complete the Mail Merge process from that location.

On the Maintain Templates tab, you can add, update, or delete templates available for use in a program. When you add or update a template, you can establish use and maintenance restriction levels.

### **Template Use Restrictions**

Each template has user restriction features that allow you to define who may use and maintain it. There are four types of user restrictions that you may choose in the Use and Maintain lists:

- **Owner:** Only the owner or creator of the template may use or maintain the template. The owner is determined by the user who originally added the template to Munis and cannot be changed. To change the owner, you must delete the template and the new owner must add it. If the current user's login does not match the owner, then access to the template is denied.
- **User:** Only specific users can use or maintain the template. This list is maintained manually on a template-by-template basis. Users' logins are checked against this list to verify that they are authorized to use the template.
- **Department:** Only specific departments can use or maintain the template. This list is maintained manually on a template-by-template basis. Users' departments, as defined by the system administrator, are checked against the list of departments to verify that they are authorized to use the template.
- **Public:** Anyone can use/maintain this template.