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Using Munis

Using Munis provides details for Munis® screen, ribbon, and standard 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 Tyler Menu in the header of the Dashboard.
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.

You can also create a Favorites list for your frequently accessed programs, sorting them by category for ease of use. In addition, the Dashboard also provides the Recent Activity section that provides direct access to the ten most recently accessed programs. To return to a recently viewed program, click the program name in the Recent Activity list.
**Favorites**

The Favorites group on the Tyler Dashboard provides easy access to the Munis programs that you use frequently.

To add a program to the My Favorites group, navigate to the program in the Tyler Menu and then right-click the program name. When you click Add to My Favorites, the Dashboard immediately includes the program in your My Favorites menu.

Using the Edit Favorites option on the Tyler Dashboard, you can create categories for your favorite programs, and then add programs to those categories.
To add a category to the Favorites group, click **Edit Favorites**, select **Add Category**, enter the category name, and then click **Save Favorite**.

To add a menu program to a category, navigate to the program and copy the program URL. On the Dashboard, click **Edit Favorites**, select the category, and then enter the program name and URL. When you save the favorite, the page refreshes to provide the program in the assigned category of the Dashboard menu.
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, a payroll entry person 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.

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, the System, Financials, General Revenues, or other 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.

**Tyler Menu**

<table>
<thead>
<tr>
<th>Munis</th>
<th>Financials</th>
<th>Munis Product</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Ledger Menu</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Budget Processing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Purchasing</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>Munis Module</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Setup</td>
<td></td>
</tr>
<tr>
<td>Invoice Processing</td>
<td>Munis Program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Invoice Entry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Invoice Approvals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Modify Invoices</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recurring Invoices</td>
<td></td>
</tr>
</tbody>
</table>

**Standard Screen Features**

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

At the top of the screen, the header includes the Tyler logo, and the Minimize, Enhancement, Help, and Close buttons.

Directly under the header is the Munis ribbon. This ribbon contains groups of related buttons that allow you to perform various actions throughout Munis programs.
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.

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.

The Menu group in the ribbon provides the program-specific actions available for a program. These options differ by program. Sometimes menu options display additional screens for the selected program, and sometimes they open other related programs. For programs that have multiple options, click More to view the complete list.

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 Tyler logo button provides access to the Help and Settings menus. These menus provide information specific to the active program.

Help provides access to the Munis online help content, as well as a direct link to the Munis KnowledgeBase and About Munis details.

- Munis online help provides screen-level help for programs and subprograms throughout the Munis applications. Each help screen includes an overview, a field descriptions table, a list of procedures, and links to additional resources.

- The Munis KnowledgeBase 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.

- About Munis accesses program, system, and environment information, which is useful when initiating a phone call to Munis Technical Support. A technical support specialist might 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 Field Form, View Database Columns, and Clear Stored Table 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.

- Clear Stored Table Settings clears personal settings for hidden columns, column layout, sort order, and so on.
The header of each program screen includes the Minimize, Enhancements, Help, and Close buttons.

**Minimize**
When you click the minimize button, the screen refreshes to display an abbreviated ribbon. This ribbon includes only the key options for managing records. Labels for the options do not display; however, if you hover your pointer over an option, the program provides a description.

The Menu option continues to provide access to a program’s extended functionality.

When you select an action option (for example, Add or Update), the screen refreshes to display the Accept and Cancel options.
**Enhancements**

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.

**Help**

Help provides access to the Munis online help content for the active program.
Close

Close terminates the active program screen. If you have unsaved changes, the program displays a confirmation message prior to closing.

### Confirm Cancel and Close Window

Are you sure you want to close this window?

⚠️ This will also cancel your current action and any changes will not be saved.

- Yes, Close
- No

### Ribbon

The following table provides descriptions for the Munis ribbon groups and buttons. If a button is dimmed on a program screen, the selection is not available.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Confirm</strong></td>
<td><strong>Accept</strong> Accept saves information after you create or update a record. This button is often highlighted when adding, updating, or searching for records.</td>
</tr>
<tr>
<td></td>
<td><strong>Cancel</strong> Cancel ends an operation, such as adding or updating a record.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td><strong>Search</strong> Search finds 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Browse</strong> 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. On a browse screen, the Excel button exports the data directly to a Microsoft® Excel spreadsheet.</td>
</tr>
<tr>
<td></td>
<td><strong>Query Builder</strong> Query Builder 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 Builder, the Query Wizard screen (similar to the expression builders found in Microsoft Excel or Microsoft Access) provides options for creating an expression based on the fields in the active program.</td>
</tr>
</tbody>
</table>
| **Actions**    | **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 default values. Press Tab to move from field-to-field or select a field with the pointer. When the cursor is in a field, helpful information often displays at the bottom of the screen. Some fields have an

Using Munis Version 11.3
<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Update</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Delete removes the record currently displayed 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.</td>
</tr>
<tr>
<td><strong>Global</strong></td>
<td>Global provides the option for updating or deleting multiple records at one time. Click the down arrow to access the global options available in the active program.</td>
</tr>
<tr>
<td><strong>Duplicate</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

**Output**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print</strong></td>
<td>Print sends a report directly to your default printer. In many instances, this output option provides the Output dialog box, which provides you with multiple print settings and options. If a program has specific output sort options or types, the program provides the appropriate options box when you click Output Options.</td>
</tr>
<tr>
<td><strong>Text File</strong></td>
<td>Text File saves a report to a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. The Saved Reports program is available on the Departmental Functions menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.</td>
</tr>
<tr>
<td><strong>PDF</strong></td>
<td>PDF creates the report in PDF format. The program opens the document in the installed PDF reader. <strong>Note</strong>: 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.</td>
</tr>
<tr>
<td><strong>Preview</strong></td>
<td>Preview immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.</td>
</tr>
</tbody>
</table>

**Office**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Excel** | Excel exports the active set of records to a Microsoft Excel spreadsheet.  
  - If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application.  
  - 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.  
  In each case, the program inserts hyperlinks to the individual Munis records. |
<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The file created during export is automatically saved to your Munis directory; use the Save As feature in Excel to save the file to a new location.</td>
</tr>
<tr>
<td><img src="image" alt="Word" /></td>
<td>Word creates an active set of records to export into Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing.</td>
</tr>
<tr>
<td><img src="image" alt="Email" /></td>
<td>Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, Tyler Dashboard opens, and in turn opens the Munis program with the linked record as the current record. <strong>Note:</strong> This feature requires that the Tyler Dashboard be enabled.</td>
</tr>
<tr>
<td><img src="image" alt="Schedule" /></td>
<td>Schedule displays the Appointments screen, which schedules meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message containing 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 Exchange calendar.</td>
</tr>
</tbody>
</table>

**Tools**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Attach](image) | Attach allows you to view, add, or delete documentation related to the current record.  
- If your organization uses Tyler Content Manager (TCM), the Attachments option displays a Document Mappings dialog box. When you select an available mapping, the program opens TCM.  
- 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. 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. **Note:** This option is accessible only if the View Attachments and Associated Documents check box is selected in the Roles – Munis System program. In addition, the TylerCM for Munis Settings program must get setup to accommodate your attachments preference. |
<p>| <img src="image" alt="Notes" /> | Notes provides the option for adding or updating notes for the selected record. If more than one type of Notes options are available, click the down arrow to select the applicable notes option and add or update a note using the Text Editor program. |
| <img src="image" alt="Notify" /> | Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone, email, or text message using predefined content. <strong>Note:</strong> This feature is only available if your organization has installed and implemented Tyler Notify. |
| <img src="image" alt="Audit" /> | Audit provides the audit history for the selected record. |</p>
<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit</td>
<td>MapLink provides integration of map data sources with Munis programs. 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. Click the down arrow for MapLink options.</td>
</tr>
<tr>
<td><img src="image" alt="MapLink" /></td>
<td>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. Click the down arrow for MapLink options.</td>
</tr>
<tr>
<td><img src="image" alt="Alerts" /></td>
<td>Alerts allows 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.</td>
</tr>
<tr>
<td><img src="image" alt="Menu" /></td>
<td>The Menu group provides options specific to managing data in the active program and options for accessing related programs. The options in this group vary by program; for programs with multiple options, click the More arrow to view the complete list.</td>
</tr>
<tr>
<td><img src="image" alt="Return" /></td>
<td>Return closes the current screen and returns you to the previous screen of the active program.</td>
</tr>
</tbody>
</table>
Shortcut Keys
Munis provides task shortcut keys and menu shortcut keys that allow you to use your keyboard to complete tasks or access program options.

Task shortcut keys are available for actions typically initiated from the ribbon. When you hover your pointer over a ribbon option, a ToolTip provides a description and the applicable shortcut keys, as available. For example, if you hover your pointer over the Search option on the ribbon, the ToolTip indicates Ctrl+F as the shortcut for the action.

<table>
<thead>
<tr>
<th>Available Shortcuts</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shortcut</strong></td>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>Enter</td>
<td>Saves the active record.</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancels changes to the active record.</td>
</tr>
<tr>
<td>Tab</td>
<td>Moves forward to the next available field; press <strong>Shift+Tab</strong> to move back to a previous field.</td>
</tr>
<tr>
<td>Space Bar</td>
<td>• Clears or selects check boxes.</td>
</tr>
<tr>
<td></td>
<td>• Displays available options in a list field. Use the up and down arrows to move through the options; press <strong>Enter</strong> to select an option.</td>
</tr>
<tr>
<td>Ctrl+U</td>
<td>Initiates Update mode for the current record.</td>
</tr>
<tr>
<td>Ctrl+Alt+P</td>
<td>Prints the active record or active set of records.</td>
</tr>
<tr>
<td>Ctrl+I</td>
<td>Initiates Add mode in an active program.</td>
</tr>
<tr>
<td>Ctrl+F</td>
<td>Initiates the Search process.</td>
</tr>
<tr>
<td>Ctrl+D</td>
<td>Deletes the active record.</td>
</tr>
<tr>
<td>Ctrl+B</td>
<td>Provides a browse screen of the active set of records.</td>
</tr>
<tr>
<td>Ctrl+Down Arrow</td>
<td>Move to the next record in an active set.</td>
</tr>
<tr>
<td>Ctrl+Up Arrow</td>
<td>Move to the previous record in an active set.</td>
</tr>
<tr>
<td>Ctrl+Right Arrow</td>
<td>Move to the last record in the active set.</td>
</tr>
<tr>
<td>Ctrl+Left Arrow</td>
<td>Move to the first record in the active set.</td>
</tr>
</tbody>
</table>
Menu shortcut keys are assigned to the program-specific options available in the Menu group of the ribbon. These shortcut keys are programmatically created and assigned to the Menu group option in the following order:

- Alt+1 through Alt+0
- Alt+Shift+1 through Alt+Shift+0
- Ctrl+Alt+Shift+1 through Ctrl+Alt+Shift+0

These shortcut keys do not function with the numeric keypad; you must use Alt+[standard keyboard number] for these to work. In addition, these shortcut keys are assigned to existing Menu options, in the order the Menu options are currently arranged. If a new option is added between two existing options, the shortcut keys change from the point of the added option through the rest of the available options. The same is true if a Menu option is removed; in this case, all shortcuts from the deleted option through the remainder of the list are reassigned.

When you hover your pointer over an option, the ToolTip provides a description of the option and the shortcut key in parentheses. For example, in Account Master, Alt+1 displays the Amounts page.

For programs that have existing hard-coded shortcut keys, two shortcut keys are presented. For example, in General Journal Entry/Proof or Application Entry, shortcut keys are embedded in the code and these are presented as the first shortcut key option in the ToolTip.

In these cases, press the alpha shortcut key or the Alt+# key to activate the selected option.
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 ribbon, complete 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 boldface labels.
Using Wildcard Card 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** in the Search group of the ribbon 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.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>is null</td>
</tr>
<tr>
<td></td>
<td>Use to find records that have a NULL in a field.</td>
</tr>
<tr>
<td>= or ==</td>
<td>equal to</td>
</tr>
<tr>
<td></td>
<td>Use to find records that are equal to the value typed in the box. For example, typing =ME in the State box finds records where the value equals ME.</td>
</tr>
<tr>
<td>&lt;</td>
<td>less than</td>
</tr>
<tr>
<td></td>
<td>Use to find records with a value less than the data typed in the box. For example, typing &lt;L finds data from A–K.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>less than or equal to</td>
</tr>
<tr>
<td></td>
<td>Use to find records with a value less than or equal to the data typed in the box. For example, typing &lt;=L finds data from A–L.</td>
</tr>
<tr>
<td>&gt;</td>
<td>greater than</td>
</tr>
<tr>
<td></td>
<td>Use to find records with a value greater than the data typed in the box. For example, typing &gt;L finds data from M–Z.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>greater than or equal to</td>
</tr>
<tr>
<td></td>
<td>Use to find records with a value greater than or equal to the data typed in the box. For example, typing &gt;=L finds data from L–Z.</td>
</tr>
<tr>
<td>&lt;&gt; or !=</td>
<td>not equal</td>
</tr>
<tr>
<td></td>
<td>Use to find records with values not equal to the data typed in the box. For example, typing &lt;&gt;1 finds all records where the value is not equal to 1.</td>
</tr>
<tr>
<td>&lt;!</td>
<td>less than ASCII (33)</td>
</tr>
<tr>
<td></td>
<td>Use to find records that have a space in a field.</td>
</tr>
<tr>
<td>: or ..</td>
<td>range</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>or</td>
</tr>
<tr>
<td></td>
<td>Use to find records with this value or that value. For example, typing Cash</td>
</tr>
<tr>
<td>*</td>
<td>wildcard</td>
</tr>
<tr>
<td></td>
<td>Use to find all records with the same sequential character string that begins, includes, or ends with an asterisk (<em>). For example, typing ARL</em> 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.</td>
</tr>
<tr>
<td>?</td>
<td>single-character wildcard</td>
</tr>
<tr>
<td>Symbol</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>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 ABC, ADC, ACC, AEC, and so on.</td>
</tr>
</tbody>
</table>

[c]  
a set of characters  
Use to find all codes, as follows:  
- Start with N or T: [NT]*  
- Start in lowercase: [a-z]*  
- Start in uppercase: [A-Z]*  
Use to find all two-character codes, as follows:  
- Start in lowercase: [a-z]?  
- Start in uppercase: [A-Z]?

**Using Query (Advanced Find)**

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 available in the Search group; it is only accessible after you click Search.
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 =&gt;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 Finds, use concise descriptions for saved queries in order to make it clear which queries are appropriate for each Find. When you save a query, click Accept on the ribbon 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 ribbon.
2. Click **Query Builder** on the ribbon.
   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 that 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 at a later time, click **Save As** from the Fields tab or one of the Assistant tabs. Once you have created a query, you can view or select them 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 36.

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 36.
- Click **Next** to view record 3 of 36.
- Click **Last** to view the last record in the active set (record 36).

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

**Note:** The Attachments button displays in the navigation bar according to the parameters defined in the System Administration > System Settings > Site Settings program. If the Remove the Indicator from Application Main Screens check box is selected on the General tab of the Site Settings program, the Attachments button is not available in the navigation bar.
**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.

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

- To view or hide columns, right-click the column headings. Select the columns containing data you wish to view; clear those columns that you wish to hide. 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, the output does not include columns that you have hidden on the screen 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 hold the mouse button down while you drag the bar to the right or left.

Once you have the records selected and sorted as you wish, use the Preview, PDF, Print, or Text File ribbon button 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 a hyperlink to the record within Munis.

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 execute 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 create reports by creating an active set of records and then using the Output ribbon options (Preview, PDF, Print, or Text File) 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 Preview, the program provides the report in HTML format with no page breaks.

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.

In order 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 the 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 use the Output ribbon buttons 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.

When you select In Background (Now) or At a Scheduled Time, the program displays the Munis Scheduler screen.

<table>
<thead>
<tr>
<th>Description</th>
<th>Payroll History Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run once on</td>
<td>05/13/2014 at 18:00:00</td>
</tr>
</tbody>
</table>

Notify

When job starts: melfring
When job completes: melfring
If job expires: melfring

Output

Title: INDIVIDUAL EARNINGS RECORD BY SSN
Output: Print to display
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 activities. On the Notifications screen, select the event to trigger the notification, and then identify the recipient by user ID, role, or email address.

Saved Reports

The Saved Reports program manages reports that have been directed to the Munis spool directory. With the print spooler, you can hold, reprint, or delete Munis reports. You can also print specific ranges of a report.

If your organization uses the Tyler Content Manager or the Laserfiche content management system, use the Saved Reports program to submit or retrieve documents from these systems. This program provides content submittal and retrieval using Tyler Content Manager or Laserfiche, according to the settings applied in the System Settings program.
If your organization uses Tyler Content Manager, the Submit - TylerCM and Retrieve - TylerCM options are available. If your organization uses a Laserfiche content manager, the Submit - Laserfiche and Retrieve - Laserfiche options are available.

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 ribbon 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 of the files, or click **Select None** to clear all of 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 of 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, Word, and Excel options allow you to attach documents to a Munis record, or to export Munis data to a Microsoft Word document or Microsoft Excel spreadsheet. These options must be activated by your system administrator to be available. To use the Word and Excel options, you must also have Microsoft Word and or Microsoft Excel installed on your computer.

Attach

Attach allows you to view, add, or delete documentation related to the current record.

The View Attachments and Associated Documents check box in the Roles – Munis System program restricts access to the Attach button on the ribbon. If this check box is not selected, the Attachments option is not available.

Standard Munis Attachments

If your organization uses standard Munis attachments, click Attach on the ribbon to display the Attachments screen.

To add a document, click Add in the ribbon, complete the File Upload dialog box, and then navigate to the file to upload to attach a 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 ribbon, highlight the document to remove from the Attachments screen, and click Delete. To view an attachment, click Attach on the ribbon, highlight the document to view, and click Accept.

**Tyler Content Manager**

If your organization uses Tyler Content Manager (TCM), when you click Attach, Munis provides the Document Mappings dialog box.
When you highlight any of the other Document Mapping items and click View Documents, Munis launches TCM for the selected document mapping and its associated document type.

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

**Note:** The View Attachments and Associated Documents check box in the Roles–Munis System program restricts access to the Attachments button on the ribbon. If this check box is not selected, these options are not available.

If your organization uses a Laserfiche® content manager, the TCM provides access to your content management system.
Excel, 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 or 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 ribbon 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.
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.

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 on the Word ribbon to save the file to another directory.

In the More Options group on the Template Options tab, the Template Library button opens the Munis KnowledgeBase with a list of all of the templates available for the program from which you accessed Word. Not all programs have templates; if templates are not available, the program opens the Munis KnowledgeBase showing no search results and with all options dimmed. Close the Munis KnowledgeBase screen to return to the Munis Word Mail Merge screen.

The Export Data Source button on the Template Options tab exports the current data to a .csv file. Using this file, you can create your own template based on the exported data.

The Use TCM Merge button is available on the Template Options tab 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.
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. In order to change the owner, you have to 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 are allowed to 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 are allowed to 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.