

Munis 101 - Part 1 & 2

Product-Suite: Munis

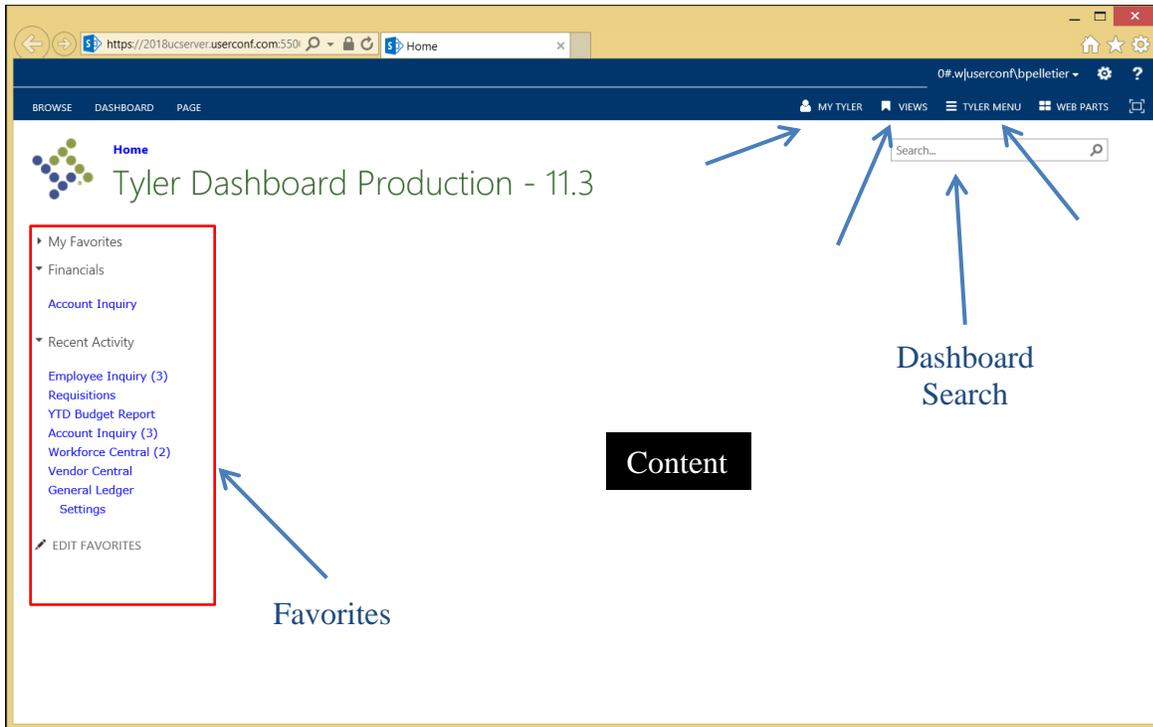
CLASS DESCRIPTION

Maybe you are new to Munis or you've used it for a while. Often times during the course of a busy day, week or month it's easy to overlook new and different Munis features. Let me take you on a guided tour of Munis functionality where you are bound to learn a few tips and tricks that will save time and enhance your use of Munis. **Part 1)** Learn to navigate and customize your Tyler Dashboard with web parts, views and TylerU/Tyler Community. We'll also review valuable Central programs. **Part 2)** Understand the many benefits of Command Center programs, the layout of information in Munis programs, toolbar ribbon commands and various types of program screen fields.

OBJECTIVE: Part 1) Attendees will gain an enhanced understanding and use of the dashboard, dashboard components and of Central programs resulting in expanded and improved use of these functions. **Part 2)** Participants will pick up tips, tricks using Command Center and traditional Munis programs to improve their daily use of Munis

MUNIS DASHBOARD

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



NOTE This document shows Dashboard V6.3

- Content** Displays web parts, menus and other dashboard content contained within a view.
- Favorites** Provides quick access to Munis programs:
 - My Favorites: User selected favorite programs
 - Recent Activity: Recently accessed programs
 - Edit Favorites: User customizable favorites area
- My Tyler** Provides quick access to Tyler U and Tyler Community
- Views** Create/Manage multiple display areas for web parts. The default view is **HOME**
- Tyler Menu** Opens a panel with Tyler menus
- Central Dashboard Search** Search across many Munis areas

DASHBOARD NAVIGATION

Munis Dashboard runs within a browser (Internet Explorer, Google Chrome or Safari). Here are a couple of points in navigating the dashboard:

- Most all items in the dashboard are links and as such require just a single click to select
- After selecting an option there will be a brief delay while the information appears or the program loads

The dashboard is intended to be personal for each user. Spend time customizing it to gain the most benefit from it.

FAVORITES

The Favorites area should be one of the most utilized areas of the dashboard. Use this area to build lists of programs you frequently or even occasionally use.

Categories

- User definable. Used to group programs
- Click  to expand and  to collapse the category

Programs

- Can be Munis programs, websites etc.



Adding Favorites

The easiest way to add favorites is:

- Locate the program in the Tyler Menu
- Right click on a menu option to add as a favorite
 - Select Add to My Favorites to add to the list of My Favorites
 - Add to My Programs adds to an existing or new category
- The program is automatically added to the My Favorites menu or a category named after the top menu

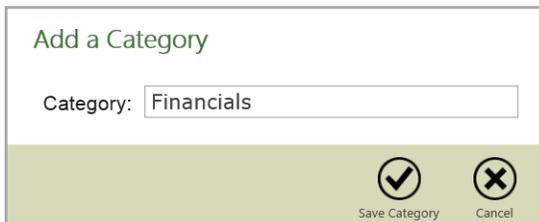


Managing Favorites

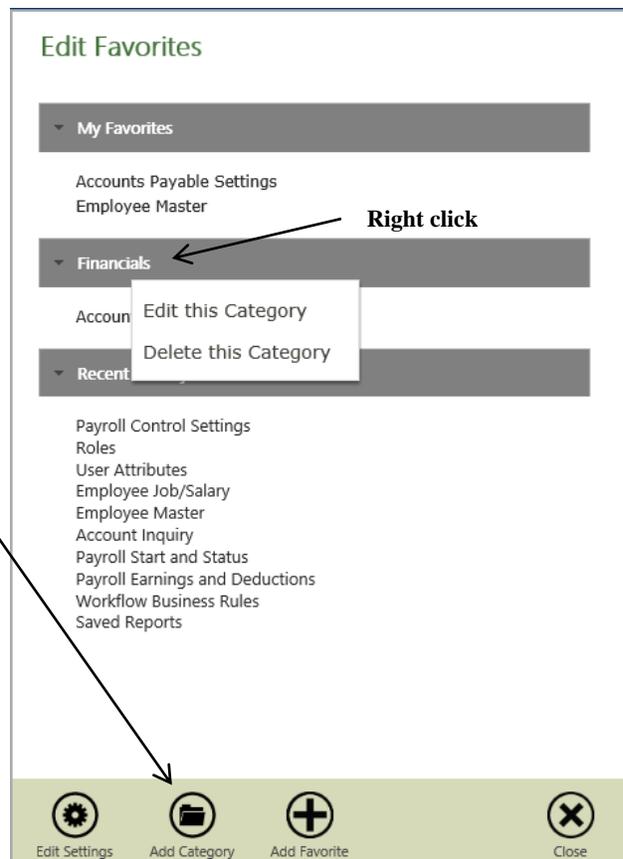
Manage/edit favorites to create a quick, easy to use and logical flowing set of programs.

CATEGORY

- Edit a category by left clicking on a category name and select Edit
- Change the category name and click Save Category



- Select Add Category to add a new category
- Consider creating categories that include programs for periodic processes



PROGRAMS

To move a program to another category drag and drop it to the desired category or left click on it and change the category from the drop down list

SETTINGS

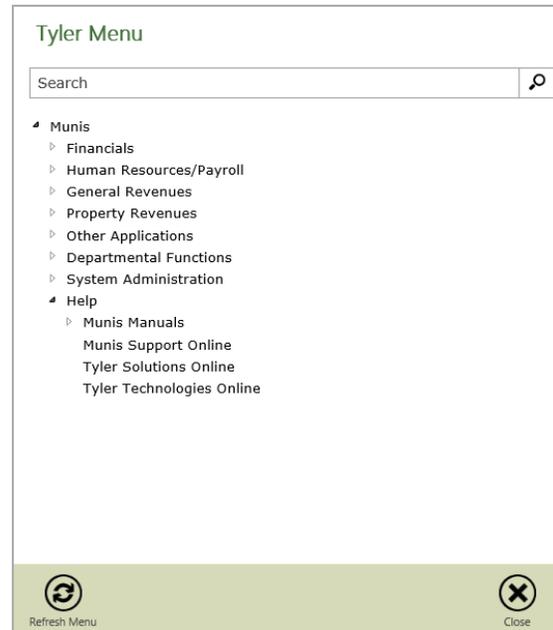
The settings panel allows you to customize the favorites and search functions:

- Include My Favorites in Programs: Older style program favorites
- Include Recent Activity in Programs: Last 10 programs accessed
- Items returned in Menu Search: Assists in limiting search results

TYLER MENU

Tyler menus allow access to all products a user has permissions to view.

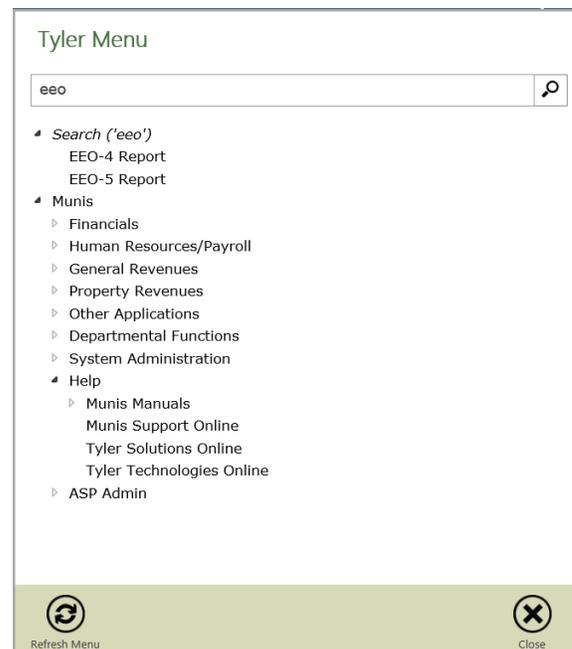
- Navigating menus same as favorites



SEARCH MENU/PROGRAMS

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

- Search results appear with Tyler menu options
- The maximum number of results returned is set in the Edit Settings option in My Favorites
- Hover over option to see menu path





CENTRAL DASHBOARD SEARCH

This function conducts a broad search across menus, Tyler U, web parts and Munis data with a single search. Results can be viewed and details of the records retrieved and viewed in a Central program.

Search Categories	Search Results
SharePoint (0)	Sort By: Name Sort Direction: Ascending
Tyler Menu (0)	OFFICE DEPOT - 20060012 PONumber: 20060012 FiscalYear: 2006
Web Parts (0)	OFFICE DEPOT - 20060035 PONumber: 20060035 FiscalYear: 2006
Centrals (59)	OFFICE DEPOT - 20070021 PONumber: 20070021 FiscalYear: 2007
Vendor	OFFICE DEPOT - 20080015 PONumber: 20080015 FiscalYear: 2008
PurchaseOrder 10	OFFICE DEPOT - 20080025 PONumber: 20080025 FiscalYear: 2008
Invoice 46	OFFICE DEPOT - 20080029 PONumber: 20080029 FiscalYear: 2008
	OFFICE DEPOT - 20080030 PONumber: 20080030
	OFFICE DEPOT - 20080031 PONumber: 20080031
	THE HOME DEPOT - 20150040 PONumber: 20150040

Drilling into a record opens it in a Central Program:

20060012 OFFICE DEPOT
2006, Closed, FURNITURE: OFFICE

Purchase Order
Ordered: \$1,050.00
Vendor: OFFICE DEPOT
Requisition: 20050004
Department: FINANCE DEPARTMENT

Totals

Change Order	Quantity	Quantity Invoiced	Unit Price	Ordered	Liquidated	Canceled	Balance
Ordered	1,050.00						
Liquidated		1,050.00					
Canceled						0.00	
Balance							0.00

Line	Description	Change Order	Quantity	Quantity Invoiced	Unit Price	Ordered	Liquidated	Canceled	Balance
1	DESKS AND TABLES, WOOD	No	2	0	350.00	700.00	700.00	0.00	0.00
2	CHAIRS, WOOD	No	2	0	150.00	300.00	300.00	0.00	0.00
3	KEY STORAGE CABINETS AND FILES	No	1	0	50.00	50.00	50.00	0.00	0.00

WEB PARTS & VIEWS

Web Parts are web based programs that display information on the dashboard. Nearly 60 web parts, spanning many functional areas, are available. Active Web Parts appear in the Content area of the dashboard. Use Tyler Search with “Dashboard Web Parts” for detailed information on each web part.

NOTE Be sure you have permissions to access web parts

- Web parts are established within each view
- Web parts are grouped by category
- Expand a category to view the available web parts
- The content portion of the screen is divided into various parts
- Click and drag a web part to the area you choose
- Update saves the changes to the current view

NOTE Web Parts with (Tile) in the description can only be placed in the left/right tile areas

Code	Description	Pending	Oldest Pending	Avg Approval Time	Avg Rejection Time
APC	AP Purchasing Cards	0 ↑		0 min	0 min
APD	AP Invoice Discrepancies	9 ↑	2/23/2017 ●	0 min	0 min
APH	AP Check Approvals	0 ↑		0 min	0 min
API	AP Invoice approvals	2 ↑	2/20/2018 ●	0 min	0 min
APP	AP Payment approvals	3 ↑	2/20/2018 ●	1 hr, 12 min	0 min

CUSTOMIZING/MANAGING WEB PARTS

Many web parts can be customized to alter their default values or display different information. Each web part has some similar and some unique attributes.

Left click on a web part tile on your dashboard to obtain detailed information:

Vendor Dollars

Vendor #	Vendor Name	Vendor Type	Total Paid \$
1008	CHEVROLET	VEHICLE VENDOR	\$75.30
1009	GENERAL MOTORS	VEHICLE VENDOR	\$950.75
1001	APPLE COMPUTERS	COMPUTER VENDOR	\$2,134.38
1000	ABC SUPPLY COMPANY	SUPPLY VENDOR	\$5,483.34
1004	BMI SYSTEMS GROUP	N/A	\$12,350.50

Navigation: << < > >>

Buttons: Edit Settings (gear icon), Close (X icon)

Right click to alter settings:

Vendor Dollars Tile Configuration

Time Frame:

Title:

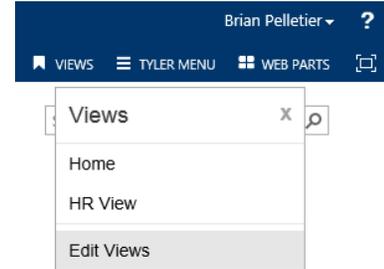
Auto Refresh Interval: Minutes

Color:

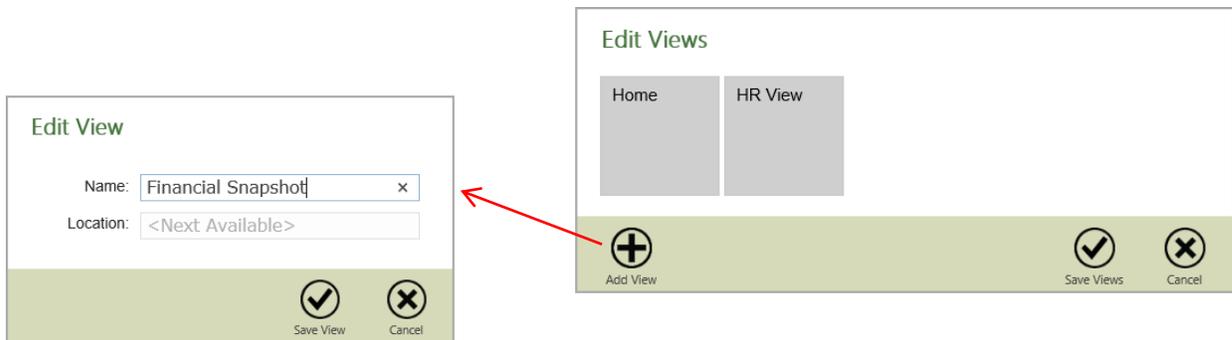
Buttons: Save (checkmark icon), Cancel (X icon)

VIEWS

Views provide multiple Content area to group and display one or more web parts. The Views dashboard link permits users to manage their views.



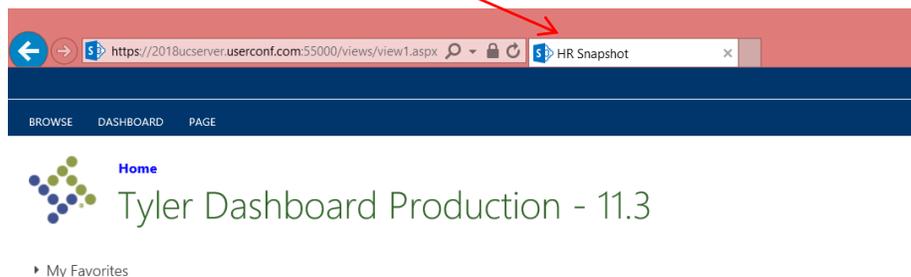
- The Home view is your default and appears upon opening Munis



NOTE Consider creating views before adding web parts

To move between views simply click on the View link and select the view from the dropdown list.

The current view name appears in your browser tab:

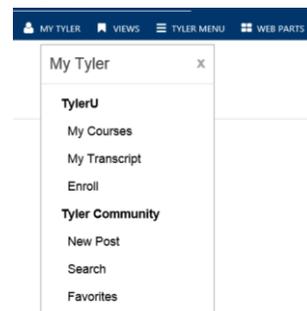
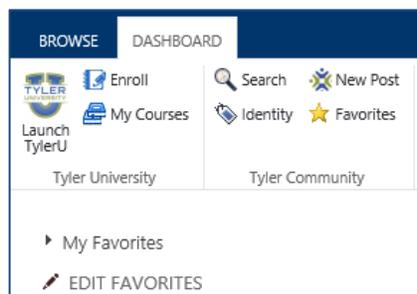


TYLERU, COMMUNITY & SEARCH

TYLERU

Tyler University is a place to improve your skills, learn new software, technology or procedures. The site contains hundreds of courses to guide users in learning a variety of Munis applications and processes. Tyler Community is a user-driven online software support community available 24/7/365. Access to TylerU and Community is available from within the dashboard.

- Click on the Dashboard tab to access TylerU and Community or My Tyler for a dropdown list



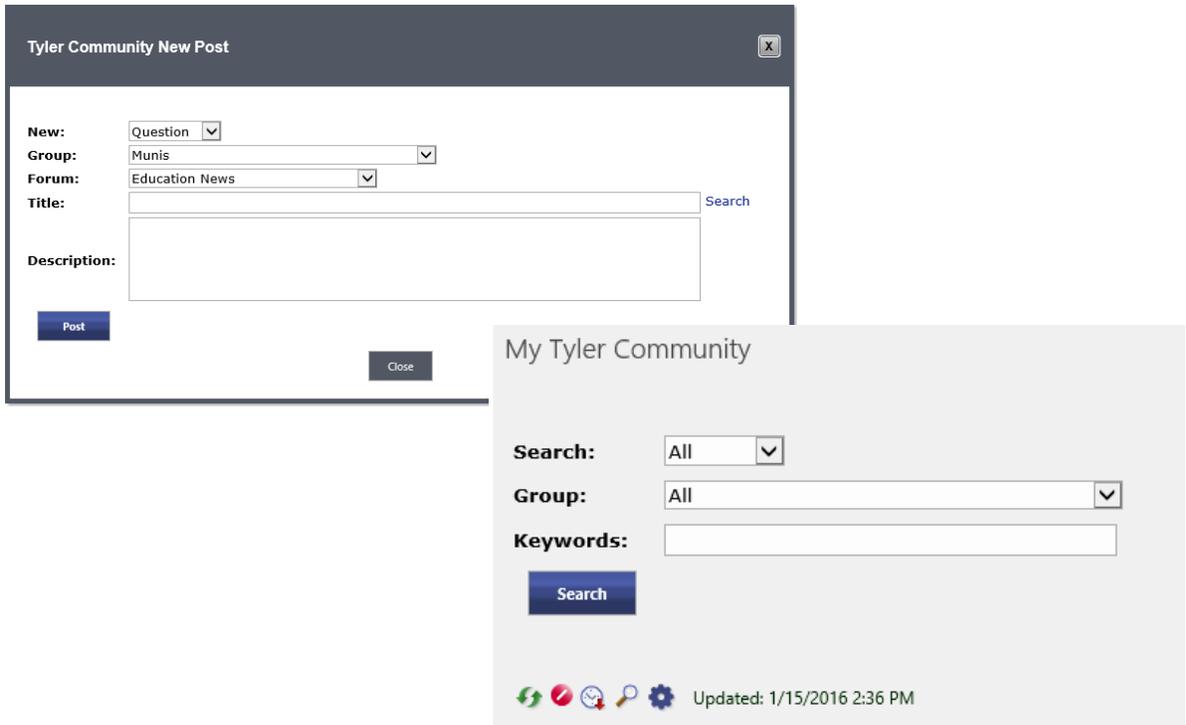
- TylerU requires an administrator at each client site establish curriculum and courses for users

TYLER COMMUNITY

Tyler Community offers access to forums, blogs, libraries, wikis, a knowledgebase and even a place to report support incidents. It's a great place to ask questions of other Munis users on how they accomplished a certain task or solved a problem or ask if others could benefit from new functionality. Each user can setup access to Tyler Community and search or pose questions from the Munis dashboard.

Community in Dashboard:

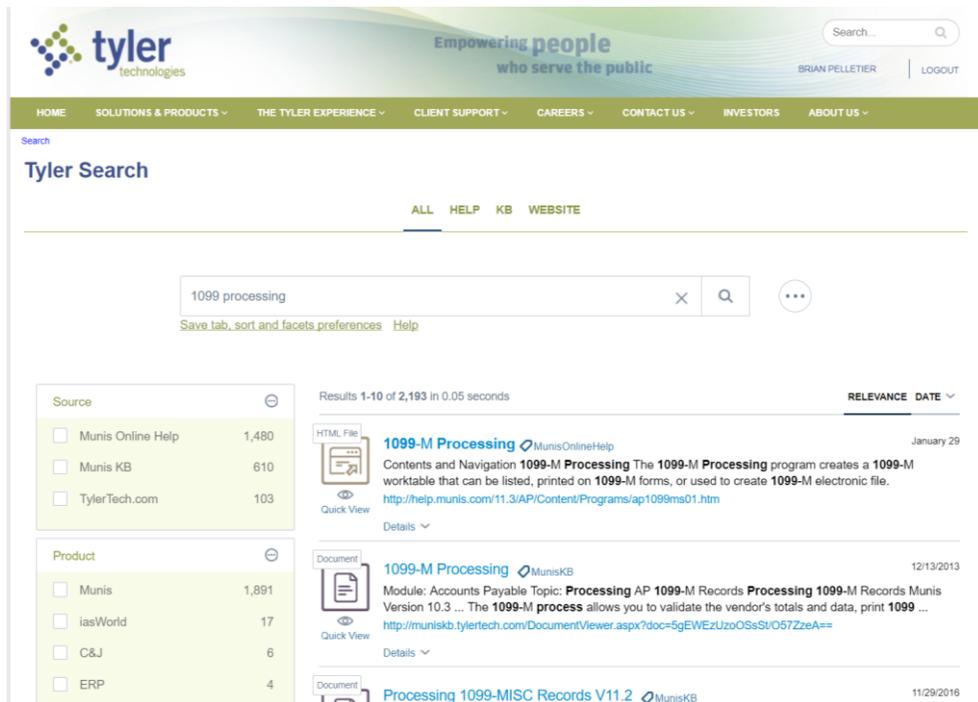
- Go to the Tyler Community website (<http://www.tylertech.com/client-support/munis-support>) and register for an account. Each user of Tyler Community must have their own account.
- Once you've received confirmation of the account return to the Tyler Community website and login.
- Select the Munis Knowledgebase link and in the keywords field type "Set Your Community" and click the Search button.
- This retrieves an eLearning document "DSH – Set Your Community Identify in the Dashboard". Click on the document to launch an eLearning recording to guide you in establishing your identity in dashboard.
- You are now ready to search and post in Tyler Community!



TYLER SEARCH

Tyler Search is a new feature in Community that allows searching across KB Documents, Munis Online Help, Tyler Community and Tyler Ongoing Education courses. It is a powerful Google style search with scoring of results based upon relevance.



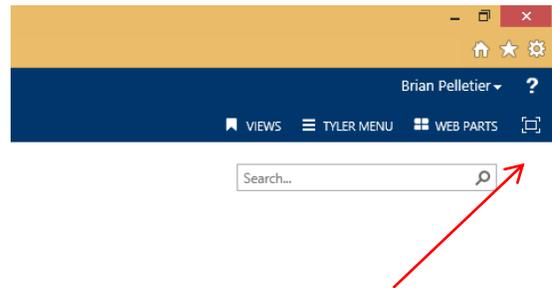


SCREEN REAL ESTATE

Sometimes you need a little more space on the screen to see that last bit of information or you just want to limit scrolling your dashboard to see all information. The new version of dashboard (V6.2) does an excellent job of minimizing clutter and maximizing web part area however you may occasionally need a little more. There are a couple of options to maximize the screen space.

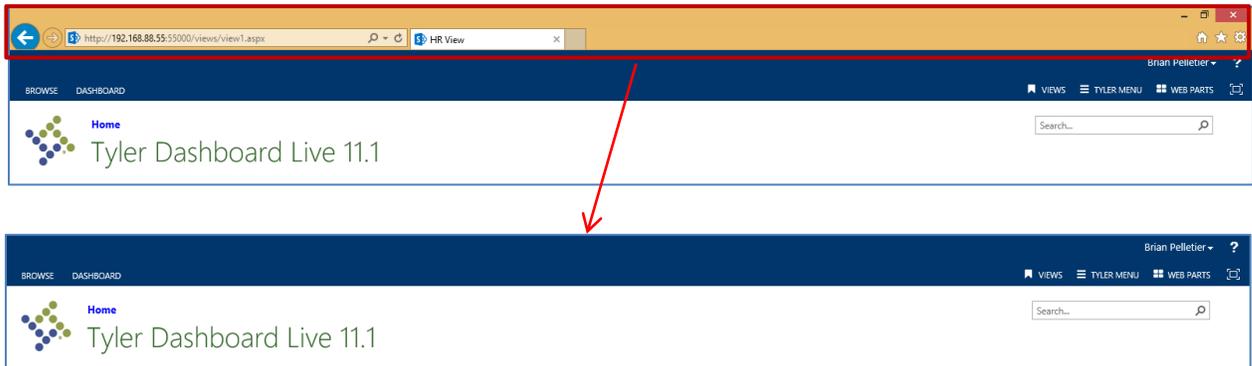
DASHBOARD

- Focus on content icon is a toggle that hides/exposes the views, favorites, search etc.



BROWSER

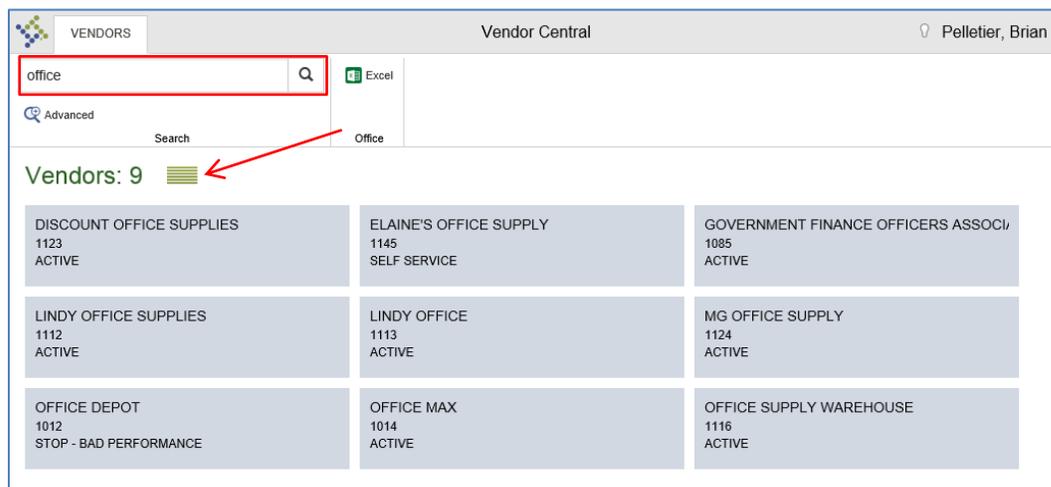
Most browsers contain a Full Screen – Enable/Disable function that maximizes the window and removes the toolbars providing additional vertical window space. Simply press the F11 (Function key 11) to enable/disable Full Screen mode. You can move your cursor to the top of the screen to see the toolbars while Full Screen mode is enabled.



CENTRAL PROGRAMS

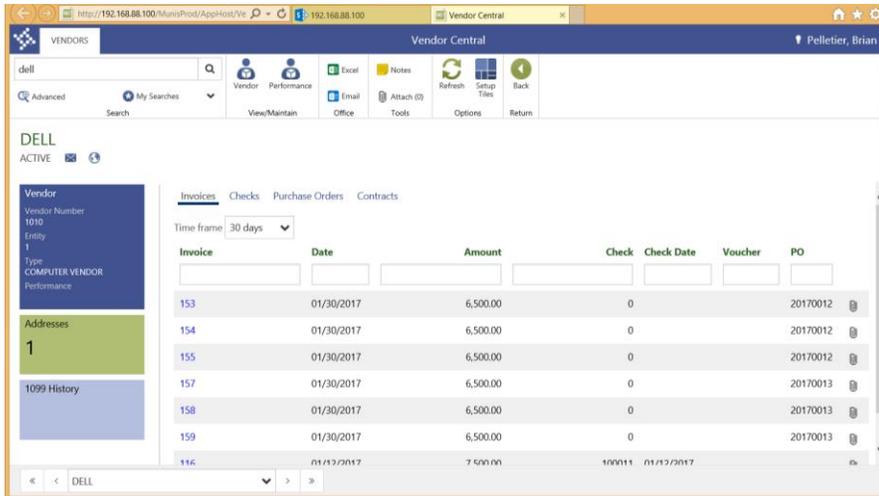
Central programs utilize a web browser to present programs and allow easy point and click navigation and enhanced presentation of data. Several central programs provide functionality similar to traditional Munis programs while others are completely new. Munis V11.3 contains over 40 Central style programs.

Many of the Central programs are configurable allowing you to personalize the presentation of information to suit your preferences. Central programs are spread throughout the Munis menus. Perform a menu search on “central”.

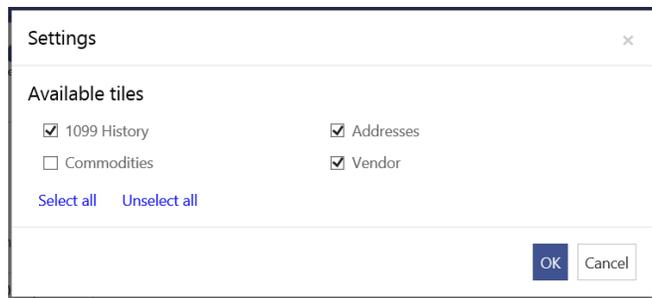


Simply enter the part of a name of a vendor/employee/customer etc. in the quick search box to retrieve a list matching your criteria.

Clicking on a vendor/employee/customer tile brings up additional information:



- Change the screen by clicking the Setup Tiles icon



Several Central programs provide the ability to not only view but also maintain information provided you have appropriate access. Click an icon in the View/Maintain group to maintain data.

ADVANCED SEARCH

The Advanced Search provides additional search fields that make it easy for the occasional user to select criteria and perform advanced finds. It also provides features to automate frequently performed searches.

The Advanced Search form includes the following fields and options:

- My searches:** Select a search (dropdown menu)
- Clear search criteria:** (link)
- Startup search:** (checkbox)
- Number:** (text input)
- Status:** (dropdown menu)
- Name:** (text input)
- Payroll Employee Number:** (text input)
- DBA:** (text input)
- DUNS:** (text input)
- City:** (text input)
- FID:** (text input)
- State:** (text input)
- W9 Received:** (checkbox)
- Zip:** (text input)
- Buttons:** Search, Save, Save As, Reset, Cancel

Select multiple options easily:

The Status dropdown menu shows the following options:

- ACTIVE
- BIDDER ✓
- INACTIVE
- ONE TIME PAY
- SELF SERVICE ✓
- STOP
- TEMPORARY

Summary: 2 of 7 options selected

Save your frequently used searches and optionally make it a startup search:

The dialog box prompts for a search name:

Name *
 VSS Registrants

Buttons: Ok, Cancel

Buttons: Search, Save, Save As, Reset, Cancel

The Advanced Search form shows the saved search criteria:

- My searches:** VSS Registrants
- Startup search:**
- Status:** SELF SERVICE

COMMAND CENTERS

Command Centers are mini dashboards within Munis allowing the user to manage many functions in a single program. Command Centers include the ability to query, report and maintain data using programs familiar to users while incorporating users' security.

- V11.X includes 6 command center programs.
- The leftmost column of icons provides access to various functional areas
- Fields and information across the top provide access to inquiry, reporting and maintenance
- Information is presented in a 360 degree view
- Each functional area (leftmost icons) contains different top of screen options

Each Command Center provides:

- Search and filtering capabilities

- Summary and detail information along with the ability to drill down into greater detail
- Access to a variety of related functional areas
- Access to setup and reporting programs

Report Writer

- Group Code Type 1 Print
- Group Code Type 2 Print
- Report Definition Type 1
- Report Definition Type 2
- Report Formatter
- Report Formatter Print
- Report Templates

Reports

- Balance Sheet
- Chart of Accounts
- Flexible Period Historical
- Historical Actuals Comparison
- Last Year Budgetary
- Major Fund
- Next Year Balance Sheet
- Subsidiary Ledgers
- Tables Validation
- Trial Balance
- YTD Budget

Setup

- Account Master
- Change Account Codes
- Chart of Account Segments
- Chart Manager
- Due To Due From
- Miscellaneous
- Report Writer
- Settings
- User Attributes

Workflow

- Accounts Payable Settings
- Accounts Receivable
- Employee Expense Codes
- Fixed Asset Accounts
- Inventory
- HR/Payroll
- Student Activities
- Utility Billing
- Work Orders

- Ability to create and maintain data and setup tables

MUNIS PROGRAMS

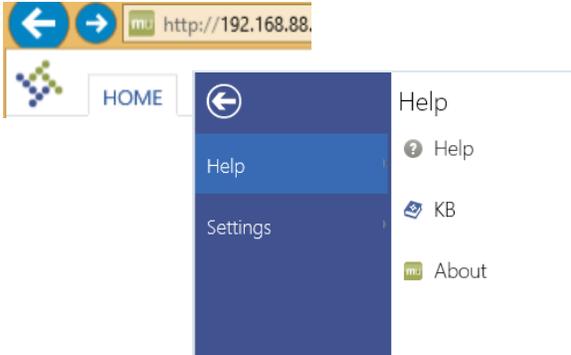
Munis programs have consistent layout, functions and other consistencies to facilitate learning and using the broad array of programs available in Munis.

The screenshot shows the 'Vendors - Munis' application window. The interface is divided into several key areas:

- Ribbon:** Located at the top, it contains various action buttons such as 'Accept', 'Cancel', 'Search', 'Browse', 'Query Builder', 'Add', 'Update', 'Delete', 'Global', 'Duplicate', 'Print', 'Text file', 'PDF', 'Preview', 'Excel', 'Word', 'Email', 'Schedule', 'Attach', 'Notify', 'Maplink', 'Alerts', 'Sort', 'Invoice Inquiry', 'REQ Vendors', 'Check Inquiry', '1099 Data', and 'More...'. It also includes 'Confirm', 'Search', 'Actions', 'Output', 'Office', 'Tools', and 'Menu' sections.
- Tabs:** A horizontal row of tabs below the ribbon, including 'Main', 'General', 'Miscellaneous', 'E-Procurement Settings', 'Contacts', 'User Defined', 'Certifications', 'Insurances', and 'Withholding'.
- Embedded links/buttons:** Within the 'Contact Information' section, there are links for 'Addresses (0)' and 'Comments (0)', and an email icon next to the 'Email' field.
- Work Area:** The main content area containing 'General Vendor Information' (with fields for Vendor, Alpha, Status, Entity, Type, Reason), 'Audits' (with fields for Entered, Modified, By, Change Set), 'Contact Information' (with fields for Company Name, DBA, Address, Zip code, City, State, Country, Email, Fax, WWW), 'Identification' (with fields for SSN, FID, DUNS), and 'Additional' (with buttons for Performance, Commodity, P-Card Transactions).
- Navigation Area:** Located at the bottom, it features navigation arrows and a page indicator '1 of 8'.

AVAILABLE FUNCTIONS AND FIELDS

Each program has a group of icons providing access to help and information about the program. Click the Tyler logo at the top left of each program screen to see the Help options:

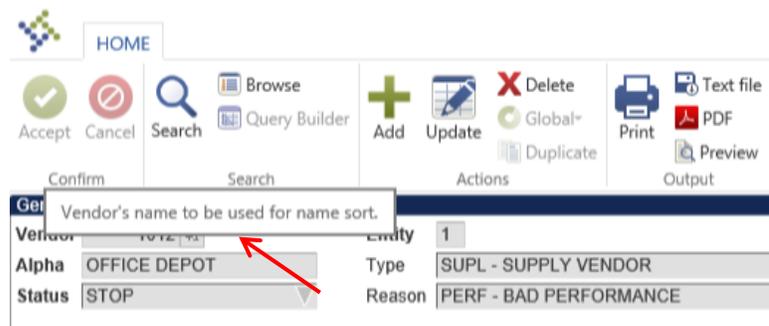


- Help – Opens a screen with field and task help for the current program
- KB - Accesses Munis Knowledgebase and presents documents related to the current program
- About - Provides information about Munis (program name, version, etc.)

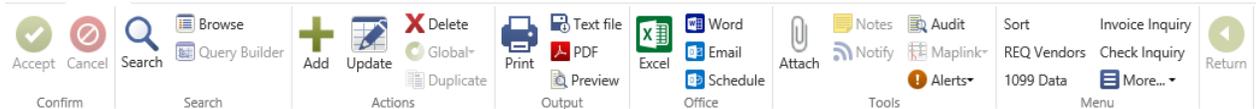
Each program also contains a couple help icons in the upper right corner

- Provides same functionality as Help
- View current and past enhancements for current program. If bulb is lit, new program changes are present

Another source of information is tool tips. Simply hover over a field, icon, link, command etc. to see a brief description:



TOOLBAR RIBBON



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

You may notice commands on the ribbon may appear sharp and colorful (in focus) or faded (out of focus) at times. The in focus commands are available for use and the out of focus commands are not.

Confirm Group:



Accept selection criteria in a find, complete an update or define
Cancel a find, update or define

Search Group:

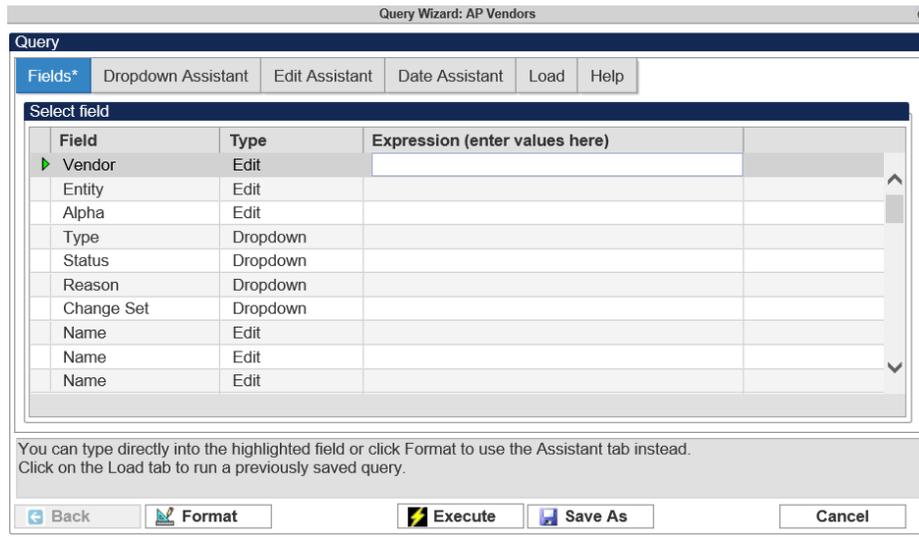


Select data records with user entered criteria. Criteria entered depends on the type of field:

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

NOTE Searching with multiple wildcards in a single field will return no results

 **Query Builder** Used to build and save queries that may be run later by the author or other users



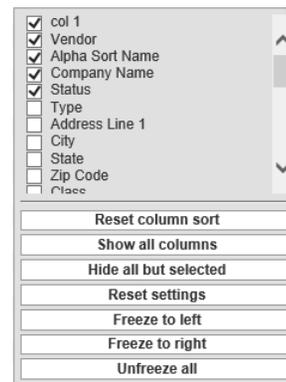
 **Browse** Allows a user to view selected records in a one line per record format. Users can select a record, review summary info, export to Excel and can be customized to each user's desire.

Vendor	Alpha Sort Name	Company Name	Status	Doing Business As
1	GELIN, MAUREEN	MAUREEN GELINAS	Active	
1000	ABC SUPPLY COMPANY	ABC SUPPLY COMPANY	Active	RBC SUPPLY COMPANY
1001	APPLE	APPLE COMPUTERS	Active	APPLE INC
1002	ABLE CONCRETE	ABLE CONCRET	Active	
1003	MUNIS		Active	MUNIS
1004	BMI SYSTEMS GROUP		Active	
1005	VISIONS		Active	
1006	KRONOS		Active	
1007	FORD MOTOR COMPANY		Active	
1008	CHEVROLET		Active	
1009	GENERAL MOTORS		Active	
1010	DELL		Active	DELL
1011	HEWLETT-PACKARD	HEWLETT-PACKARD COMPANY	Active	
1012	OFFICE DEPOT	OFFICE DEPOT	Stop	
1013	STAPLES	STAPLES	Active	STAPLES
1014	OFFICE MAX	OFFICE MAX	Active	
1017	SCHOLASTIC BOOK	SCHOLASTIC BOOK	Active	
1018	RAINBOW BRIDGE PUB	RAINBOW BRIDGE PUBLISHING	Active	
1019	TEACHERS FRIEND	TEACHERS FRIEND	Active	
1020	MILIKEN	MILIKEN	Active	
1021	UNITED POSTAL SERV	UNITED POSTAL SERVICE	Active	
1022	DOUBLEDAY PUB	DOUBLEDAY PUBLISHING	Active	
1023	IBM	IBM	Active	
1024	WORLD TRAVEL AGENCY	WORLD TRAVEL AGENCY	Active	
1025	ADAMS TREE SERVICE	ADAMS TREE SERVICE	Active	

Add/Remove/Modify Columns

Right clicking in any column heading brings up a panel allowing you to customize the browse screen to your liking:

- Select columns to view by checking the box adjacent to the description
- Ability to “Freeze” columns similar to Excel
- A couple of reset options to return to initial settings



Actions Group:



Add

Add a new record



Update

Update the current record in the find set



Delete

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



Global

Global change to select, predefined fields. Available in select programs



Duplicate

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

Output Group:



Print

Prints report to a user designated or the user’s “default” printer. A user’s default printer is established in System Administration > Security > User Attributes.



Text file

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



PDF

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



Preview

Displays one or more reports in a window on the user screen

Office Group:

-  Opens an Excel spreadsheet with the data in the current set. (Select programs)
-  Create a mail merge with data in current set. (Select programs)
-  Email a link to the current data record. Users with appropriate Munis access can open the link and view the data. (Select programs)
-  Schedule processing and report generation. (Select programs)

NOTE Munis includes keyboard shortcuts for many ribbon commands. Simply hover over a command icon to see the shortcut (e.g. CTRL+D to select the Delete command).

Tools Group:

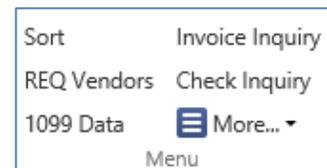
The commands in the Tools group are available in select programs

-  Retrieves documents linked to information stored in Tyler Content Manager or attached to the record
-  Enter notes associated with a data record
-  Tyler Notify enables automated notifications through email, text, twitter
-  Lists audit records associated with a data record
-  Retrieves a map associated with a data record
-  Establish an alert associated with a data record

Menu Group:

Menu group contains options specific to managing data in the program.

If  More... appears, click the down arrow adjacent to More to select additional options. The options available vary from program to program.



Return Group:

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

Work Area Fields

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

- Free form entry allows alpha-numeric characters. If the field contains a “.00” or other decimal then only numeric values are accepted.
- Dropdown requires selecting a value from a predefined list. Clicking in the field provides a list of values to select from.
- Ellipsis presents a list of predefined values that appear in their own panel. Click the ellipses to open a panel or type in an acceptable value. If the value you type in is invalid you will receive a warning message in the lower left corner of the screen
- Printed check Radio Button is used when the user has two or more options, one of which may be selected. Just click the radio button adjacent to the option you wish to use.
- Print Checkbox indicates either a yes, no or not selected. A check mark indicates Yes, blank is No and if the center is blue it has not been established.
- Date fields require a valid date and if clicked presents a calendar to select a date. Dates may be entered in a few formats: 12312010, 12/31/2010, 123110 etc.
- Status** Required fields have a Bold field label indicating you must place information in these fields to complete the addition of a new record or when updating a record.

Embedded Screen Buttons/Icons/Links

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

Examples:



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



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



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

Tabs

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

Office Group

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

Munis Office for Excel

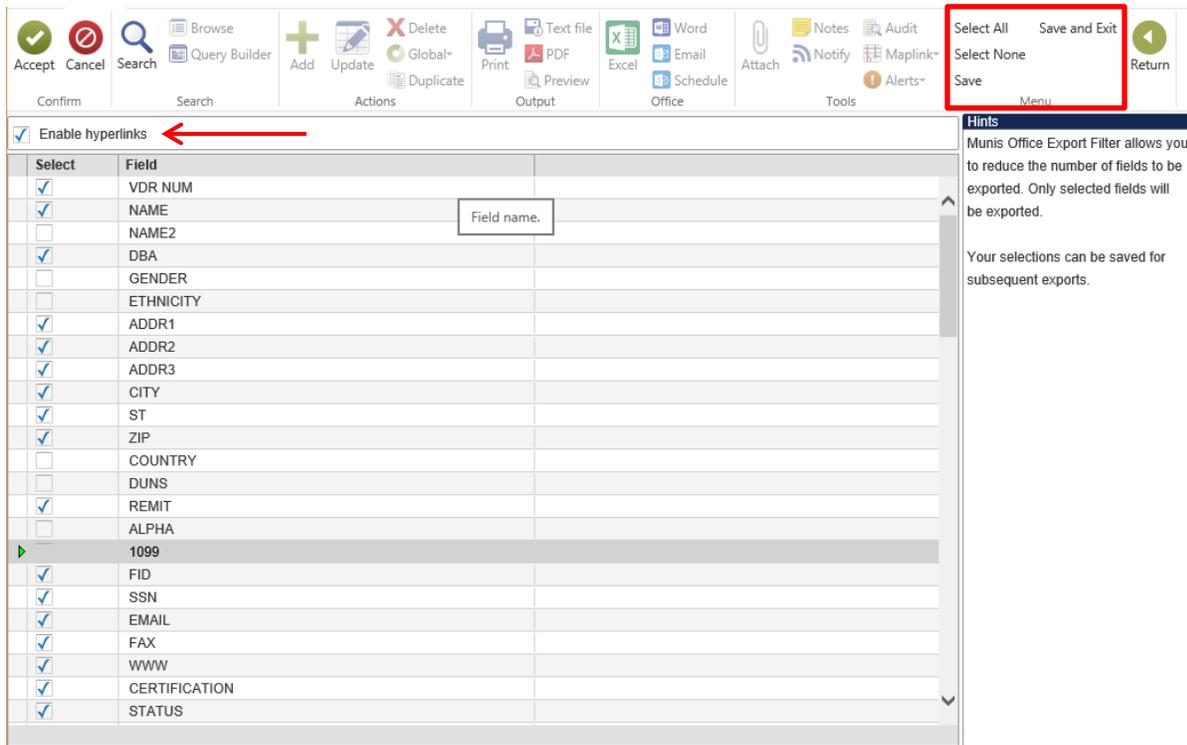
Clicking the Excel command allows users to extract data from Munis and report/analyze it in Excel.

A	B	C	D	E	F	G	H	I	J	K	L	M
VDR NUM	NAME	DBA	ADDR1	ADDR2	ADDR3	CITY	ST	ZIP	REMIT FID	SSN	EMAIL	
	1 MAUREEN GEUNAS		100 MAIN STREET			NASHUA	NH	03060	N			
1000	ABC SUPPLY COMPANY	RBC SUPPLY COMPANY	100 MAIN STREET			BOSTON	MA	02110	N	12-3123456	jean@abcsupply.com	
1000	DEF SUPPLY COMPANY		PO BOX 348992			WILLIAMSBURG	VA	23185	1		jean@tylertech.com	
1000	ABC SUPPLY COMPANY		123123 WILLOWBROOK AVENUE			PORTLAND	ME	02434	2			
1000	ABC SUPPLY COMPANY		497897 FRANKLIN AVE			WACO	TX	76710	3			
1001	APPLE COMPUTERS	APPLE INC	189 GROVE DRIVE			LOS ANGELES	CA	90036	N	65-1323543	timcook@apple.com	
1002	ABLE CONCRETE		3610 NORTH ELM STREET			HIGH POINT	NC	12412	N			
1003	MUNIS, INC.	MUNIS	370 US ROUTE 1			FALMOUTH	ME	04105	N	55-5555555	steve.bertolini@tylertech.com	
1004	BMI SYSTEMS GROUP		2164 EAST BROADWAY ROAD	SUITE 250		TEMPE	AZ	85280	N			
1005	CRYSTAL DECISIONS		840 CAMBIE STREET	VANCOUVER		BRITISH COLUMBIA	CN	V6B 4J2	N			
1006	KRONOS		297 BILLERICA ROAD			CHELMSFORD	MA		N		info@kronos.com	
1007	FORD MOTOR COMPANY		P.O. BOX 6248			DEARBORN	MI	48126	N			
1007	FORD MOTOR CREDIT COMPANY		1100 BROOKFIELD BLVD			GREENVILLE	SC	29607	1			
1008	CHEVROLET		P.O. BOX 33170			DETROIT	MI	48232-5170	N			
1009	GENERAL MOTORS		P.O. BOX 828			DETROIT	MI		N			
1010	DELL	DELL	ONE DELL WAY			ROUND ROCK	TX	78682	N		support@dell.com	
1010	DELL		ONE DELL WAY			FALMOUTH	ME	04105	1			
1011	HEWLETT-PACKARD COMPANY		3000 HANOVER STREET			PALO ALTO	CA	94304	N			
1012	OFFICE DEPOT		21329 WEST SIDE DRIVE			IRVINE	CA		N			
1013	STAPLES	STAPLES	3174 BERLIN TURNPIKE			NEWINGTON	CT	06111	N	22-2234123	support@orders.staples.com	
1014	OFFICE MAX		SOUTH BAY CENTER	8-C ALLSTATE ROAD		DORCHESTER	MA	02125	N	22-2234125	shalee.davis@tylertech.com	
1017	SCHOLASTIC BOOK		2311 WASHINGTON STREET			DETROIT	MI	48201	N	22-2344444	scott.stephen@tylertech.com	
1017	SCHOLASTIC BOOK		2311 WASHINGTON STREET			DETROIT	MI	48201	1			
1018	RAINBOW BRIDGE PUBLISHING		8989 WILLOWBROOK AVENUE			PORTLAND	ME		N			
1019	TEACHERS FRIEND		23423 ALDERMAN ROAD			DALLAS	TX		N			
1020	MILIKEN		2244 HILLTOP DRIVE			REDDING	CA	96002	N			
1021	UNITED POSTAL SERVICE		80 GOVERNMENT AVENUE			WASHINGTON	DC		N			
1021	UNITED POSTAL SERVICE		STAMPED ENVELOP UNIT	PO BOX 500		WILLIAMSBURG	PA	16693	1			
1022	DOUBLEDAY PUBLISHING		44 EAST 3RD STREET			ANSONIA	CT	06401	N			

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

- Column headings appear in bold
- Some data cells may contain data in an underlined blue font which represents hyperlinks to each record in the appropriate Munis program. If a Munis user clicks a link it will open the program and retrieve the data selected from the sheet provided they have access

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



Select	Field
<input checked="" type="checkbox"/>	VDR NUM
<input checked="" type="checkbox"/>	NAME
<input type="checkbox"/>	NAME2
<input checked="" type="checkbox"/>	DBA
<input type="checkbox"/>	GENDER
<input type="checkbox"/>	ETHNICITY
<input checked="" type="checkbox"/>	ADDR1
<input checked="" type="checkbox"/>	ADDR2
<input checked="" type="checkbox"/>	ADDR3
<input checked="" type="checkbox"/>	CITY
<input checked="" type="checkbox"/>	ST
<input checked="" type="checkbox"/>	ZIP
<input type="checkbox"/>	COUNTRY
<input type="checkbox"/>	DUNS
<input checked="" type="checkbox"/>	REMIT
<input type="checkbox"/>	ALPHA
<input checked="" type="checkbox"/>	1099
<input checked="" type="checkbox"/>	FID
<input checked="" type="checkbox"/>	SSN
<input checked="" type="checkbox"/>	EMAIL
<input checked="" type="checkbox"/>	FAX
<input checked="" type="checkbox"/>	WWW
<input checked="" type="checkbox"/>	CERTIFICATION
<input checked="" type="checkbox"/>	STATUS

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

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

Munis Office for Word

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

Template Name	Template Stored	Template Location	Owner	Use	Maintain
W-9 Notification	Munis App server	C:\Munis\musys\templates\VendorMerge.doc	jean	Public	Owner
W9 Merge jtw	Munis App server	C:\Munis\musys\templates\W9 Letter.doc	jean	Public	Owner

Access lists

Everyone can use this template: *** PUBLIC ACCESS ***

Only the owner listed below can maintain this template: jean - Jean Jones

View Users | Update List | View Users | Update List

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

NOTE If you change a template you must remove and add it back to Maintain Templates

Attachments

Select programs provide the ability to attach documents  to a record (e.g. AP Vendor, Employee, Journal Entry etc.). Additionally, the Attach icon provides access to Tyler Content Management (TCM) archived documents attached to Munis data.

Attachment Type	Document Type	Read Only	Count	Required
Vendor Attachment	Vendor Attachment		1	

Document Title	TCM Document Type	Read Only	Count
1099-G	1099-G	✓	0
1099-I	1099-I	✓	0
1099-M	1099-M	✓	0
1099-S	1099-S	✓	0
Contract Attachment	Contract Attachment	✓	0
Vendor Insurance Cert	AP Vendor Insurance		0
Vendor W-8	Vendor W-8		0
Vendor W-9	Vendor W-9		0

Show Counts

- Any type of document may be attached to a record
- Users with appropriate permissions can view the attached documents providing they have the application available to view the document on their workstation.