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.

Categories ▼ My Favorites
- Employee Master
- Financials
- Account Inquiry
- Recent Activity

Programs
- Payroll Control Settings
- Roles
- User Attributes
- Employee Job/Salary
- Employee Master
- Account Inquiry
- Payroll Start and Status
- Payroll Earnings and Deductions
- Workflow Business Rules
- Saved Reports

EDIT FAVORITES
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.

Drilling into a record opens it in a Central Program:
**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
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:

Right click to alter settings:
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

<table>
<thead>
<tr>
<th>BROWSE</th>
<th>DASHBOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login TylerU</td>
<td>Tyler University</td>
</tr>
<tr>
<td>My Courses</td>
<td>Tyler Community</td>
</tr>
</tbody>
</table>

- 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 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.

Select multiple options easily:

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 of 7 options selected</td>
</tr>
<tr>
<td>ACTIVE</td>
</tr>
<tr>
<td>BIDDER</td>
</tr>
<tr>
<td>INACTIVE</td>
</tr>
<tr>
<td>ONE TIME PAY</td>
</tr>
<tr>
<td>SELF SERVICE</td>
</tr>
<tr>
<td>STOP</td>
</tr>
<tr>
<td>TEMPORARY</td>
</tr>
</tbody>
</table>

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

- 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.
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

- **Help** - Provides same functionality as Help
- **Bulb** - 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|l”

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.

Sort by clicking on column heading

Output to Excel

Right click in heading to add/remove columns

Search/filter results
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 a new record
Update the current record in the find set
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 change to select, predefined fields. Available in select programs
Creates a duplicate of the current record. Available in select programs.

Output Group:

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.
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.
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.
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 Return 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.

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.

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.

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 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.
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 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.

- 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.

- 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.