Munis

Using Munis
Version 10.1

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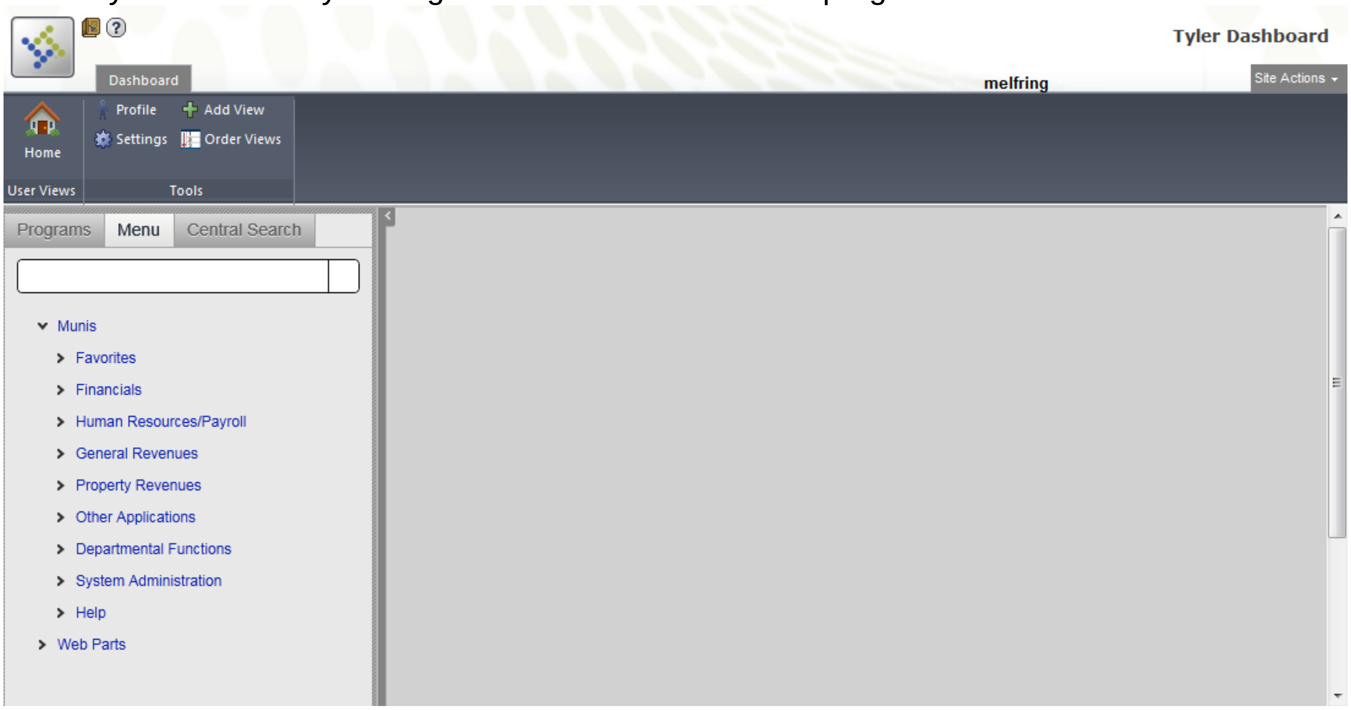
Using Munis

Using Munis describes the features of the Munis screen, ribbon, and standard menu options. It also provides keyboard shortcuts, and provides an overview of several of the features that enable you to efficiently manage information within Munis programs.



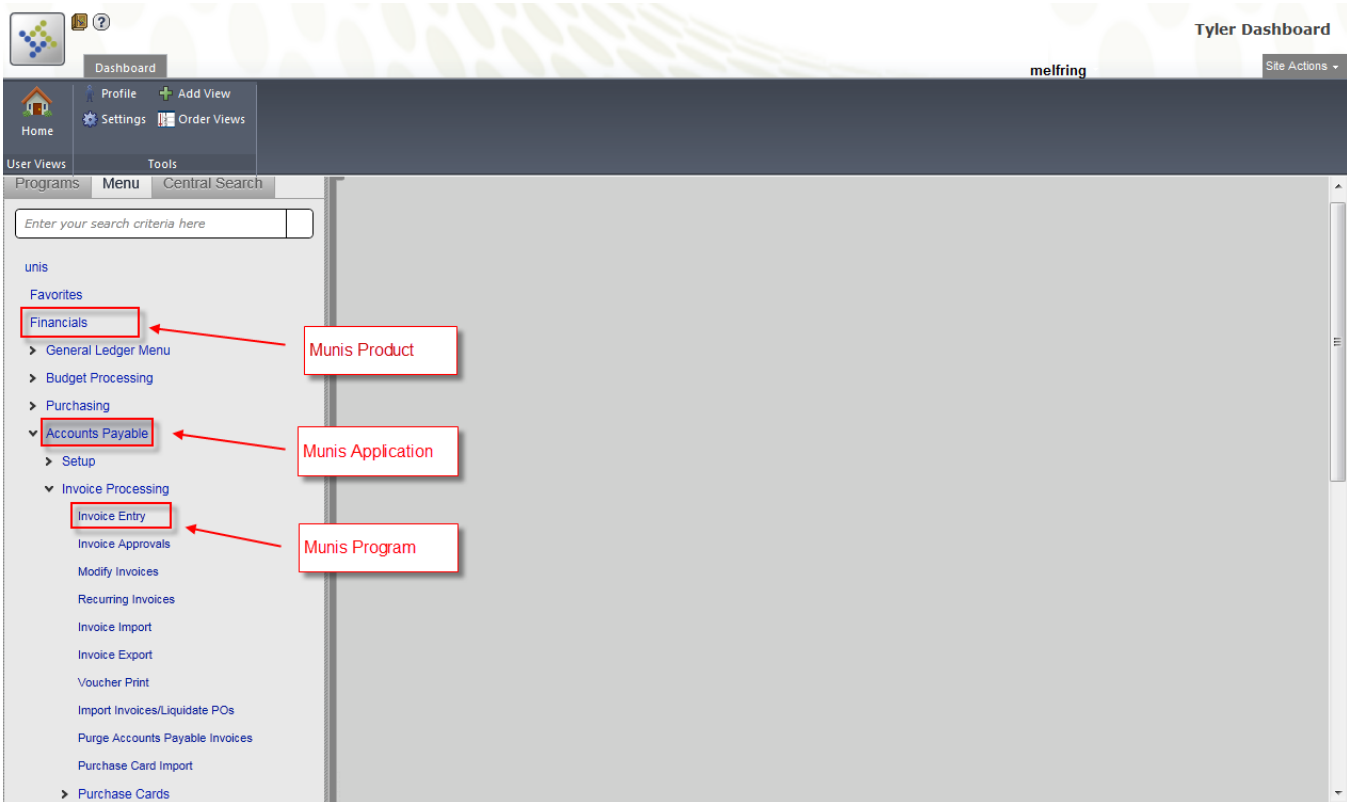
Permissions and Security

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.

Munis Menus

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

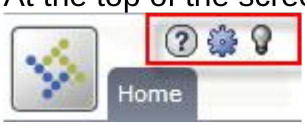
Menus are divided by Munis products, and then by applications within those products. For example, Financials is a product, and Accounts Payable is an application within that product. Within an application, there are many programs.



Standard Screen Features

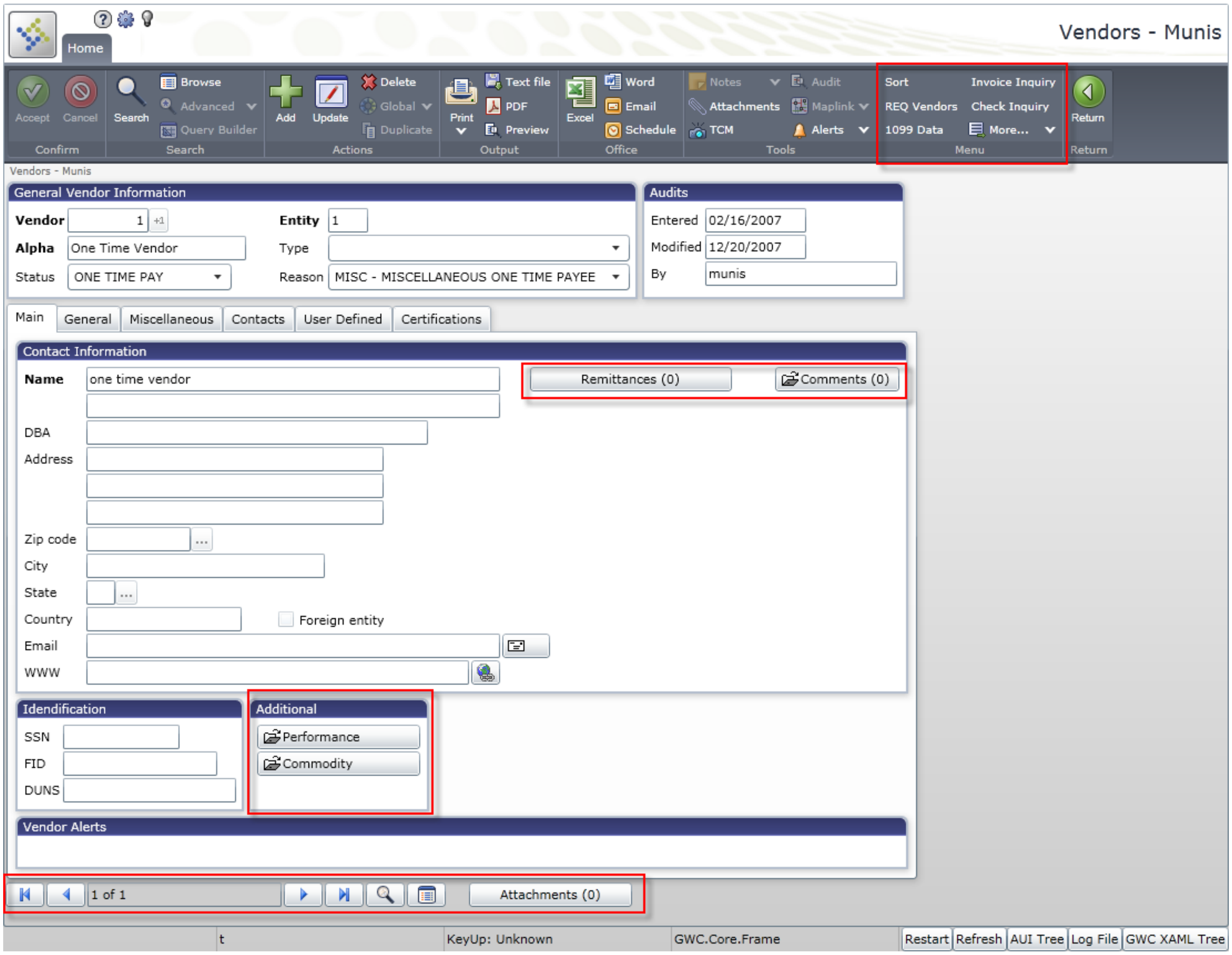
The standard Munis program screen contains several working sections, including a banner, a ribbon, menu options, and a navigation bar.

At the top of the screen, the banner includes the Help, Settings, and Enhancement buttons.



Directly under the banner 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; the work area 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, to move to the first or last record of the set, or to open attachments. You can also open a browse screen that lists all of the records in the active set.

The Menu group in the ribbon provides the program-specific actions available for a program. These options differ according to program as they may display additional screens for the selected program or they open other related programs. For programs that have multiple options, click the More arrow to view the complete list.

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

Help, Settings, and Enhancements

In the program banner, the Munis Help, Settings, and Enhancements buttons are available. These buttons provide options specific to the active program.

Option	Description
Help	Help provides access to the Munis online help content, displays the Munis KnowledgeBase search screen with a list of documents related to the active program, and provides About Munis details. Munis online help provides screen-level help for programs and subprograms throughout the Munis applications. Each help screen includes an overview, field descriptions table, list of procedures, and a resource table. About Munis accesses program, system, and environment information, which is useful when initiating a phone call to Munis Technical Support. A technical support specialist may ask you to click this button to identify the version of the software you are using. Munis programs operate differently, or have different features, depending on which version you are using. Knowing which version of the software you are currently using enables Munis Technical Support to tailor solutions to your specific needs. This option is only available on the Help menu.
Settings	Settings provides the Customizable Field Label and View Database Column options: • Customizable Field Labels allows system administration personnel to customize the text and tool tips 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.
Munis Enhancements	Munis Enhancements provides a link to current enhancement notes that are applicable to the active program. This feature is controlled by the Release Administration/Application Enhancements settings on the Site Settings screen of the System Settings program.

Ribbon and Menu Options

The ribbon is your primary resource for performing actions within each program. In addition to the ribbon, there are menu and keyboard options available to help you use Munis programs efficiently.

Ribbon

The following table provides descriptions for the Munis ribbon groups and buttons. If a button is grayed out, the selection is not available.

Image	Description
Confirm	
Accept	Accept saves information after you have created or updated a record. This button is often highlighted when adding, updating, or searching for records.
Cancel	Cancel ends an operation, such as adding or updating a record.
Search	
Search	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.
Browse	Browse is available when an active set of records exists, or after an active set is created using the Find 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. This functionality requires that you have Microsoft Excel 2002 or later on your workstation.
Advanced	Advanced provides advanced searching options. Click the down arrow to access the advanced options available in the active program.
Query Builder	Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard screen (similar to the expression builders found in Microsoft Excel or Microsoft Access) allows you to create an expression based on the fields in the active program.
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 defaults. You can move from field-to-field by pressing Tab or by selecting a field with the mouse. When the cursor is in a field, helpful information often displays at the bottom of the screen. Some fields have an additional help button that lists available field entries.

Image	Description
Update	Update adds data or changes existing data in a record. You can change data in any active field. Fields that are not active typically are part of the record key. The key is the field or combination of fields that uniquely identifies the record from all other records. If you need to change data in an key field, you must delete the record and enter it again.
Delete	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.
Global	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.
Duplicate	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.
Output	
Print	Print sends a report directly to your default printer. Click the down arrow to display output options. In many instances, Output Options opens 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.
Preview	Preview allows you to immediately view a report on the screen.
PDF	PDF creates the report in PDF format. The program opens the document in the installed PDF reader. **Note:** 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.
Text File	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. You can access Saved Reports by clicking Reports on the My menu or by clicking Saved Reports in the Departmental Functions group of the Munis Application Menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
Office	
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. This functionality does not require Munis Office, but you must have Microsoft Excel 2002 or higher installed on your workstation. • 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

Image	Description
	records. The file created during export is automatically saved in the directory where the Munis software is installed; use the Save As feature in Excel to save the file to a new location.
Word	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.
Email	Email creates an e-mail message that contains a hyperlink to the active record. When the e-mail recipient clicks the hyperlink, Tyler Dashboard opens, and in turn opens the Munis program with the linked record as the current record. **Note:** This feature requires that the Tyler Dashboard be enabled.
Schedule	Schedule displays the Appointments screen, which allows you to schedule meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an e-mail 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 e-mail recipient accepts the meeting, it is automatically added to his or her Exchange calendar.
Tools	
Notes	Notes provides the option to add or update notes for the selected record. Click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
Attachments	Attachments allows you to view, add, or delete documentation related to the current record. Once a file is attached, it is copied and stored with the Munis program. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files. **Note:** You can also view, add, or delete documentation for the current record by clicking Attachments to the right of the navigation bar on the screen. The number in parentheses indicates the number of documents attached to the record.
TCM	Image opens Tyler Content Manager for Munis or Laserfiche®. These options provide content management capability specific to Munis programs.
Audit	Audit provides the audit history for the selected record.
MapLink	MapLink allows integration of map data sources with Munis programs. The Web-based version of MapLink is an inquiry-only version. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session. Click the down arrow for MapLink options.
Alerts	Alerts allows you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute e-mails at specified dates as a

Image	Description
	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.
Menu	
	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.
Return	
	Return closes the current screen.

Other Options

Other shortcuts available within Munis programs include the following:

- Press **Tab** to move forward to the next available field; press **Shift+Tab** to move back to a previous field.
- Press **Spacebar** to clear or select check boxes.
- Press **Spacebar** to view options in a list. Use the Up and Down arrows to move through the options; press **Enter** to select an option.
- Press Ctrl+[arrow] to move through the records in an active set:
    - Press **Ctrl+Down Arrow** to the move to the next record.
    - Press **Ctrl+Up Arrow** to move to the previous record.
    - Press **Ctrl+Right Arrow** to move to the last record in the active set
    - Press **Ctrl+Left Arrow** to move to the first record in the active set.

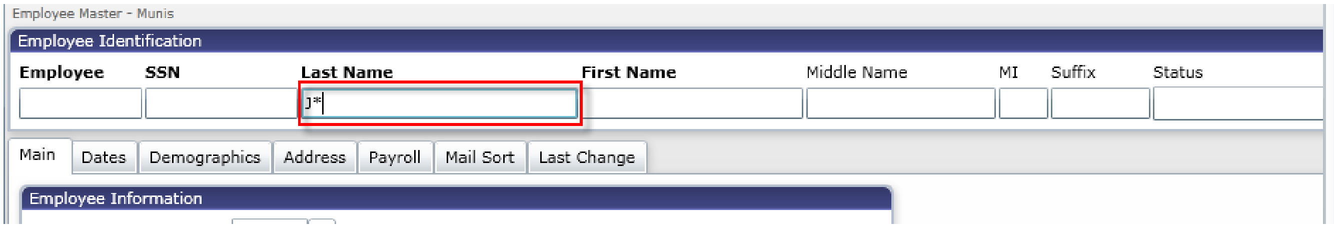
Finding Records in Munis

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.

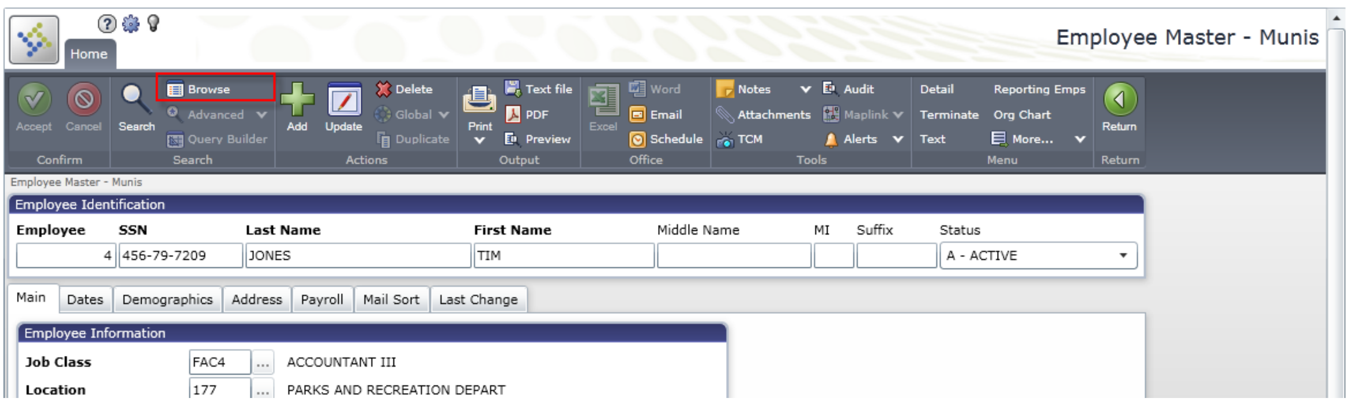
For the most efficient search, be sure to complete the Key or Required fields on the screen. (Key and required fields are identified by boldface labels.)

Using Wildcard Card Characters in Searches

Wildcard characters are symbols that you can use to refine your search criteria or to substitute for unknown values. You can include wildcard characters in boxes where you can type characters or numerals. For example, in a Name field, using a wildcard character such as an asterisk allows you to find 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, you can 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 National Bank).

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

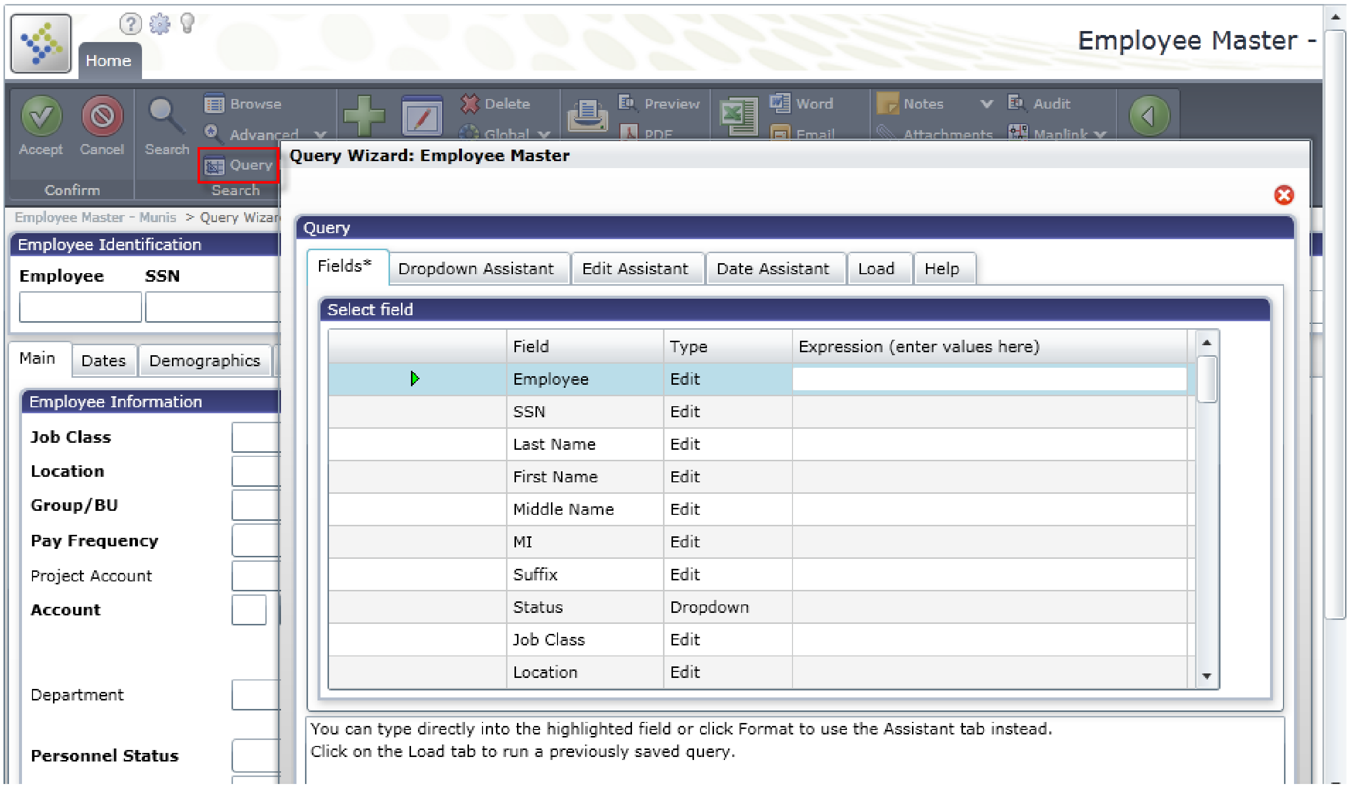
The following table provides a list of wildcard characters and their descriptions.

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

Symbol	Description
	Use to find records with a value less than the data typed in the box. For example, typing <L finds data from A–K.
<=	less than or equal to Use to find records with a value less than or equal to the data typed in the box. For example, typing <=L finds data from A–L.
>	greater than Use to find records with a value greater than the data typed in the box. For example, typing >L finds data from M–Z.
>=	greater than or equal to Use to find records with a value greater than or equal to the data typed in the box. For example, typing >=L finds data from L–Z.
<> or !=	not equal Use to find records with values not equal to the data typed in the box. For example, typing <>1 finds all records where the value is not equal to 1.
<!	less than ASCII (33) Use to find records that have a space in a field.
: or ..	range Use to find records based on data between and including two limiting characters. For example, typing A:C finds Alabama, Bermuda, California. Typing a:c finds apple, banana, coconut.
|	or Use to find records with this value or that value. For example, typing Cash|Charge finds all records where the value equals Cash, if it exists, and all records where the value equals Charge, if it exists.
*	wildcard Use to find all records with the same sequential character string that begins, includes, or ends with an asterisk (*). For example, typing ARL* finds all records starting with ARL, such as ARLBERG, ARLINGTON, ARLON, and so on. Typing *H finds all records ending with H such as SMITH, WORTH, and so on.
?	single-character wildcard Use to finds 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.
[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 Find.



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

The Load tab stores queries for specific programs so that you can use them again. For screens that allow for multiple 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, by default. 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 the Query button 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.

2. 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.
3. Build an expression:
4. List expression.
   Add items to include in your list expression.
5. 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.
6. Click Format again.
   The list or range expression you created appears in the Field tab.
7. 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 Field 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, the program allows you to 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 1 of 5, and there is one document attached to the record.

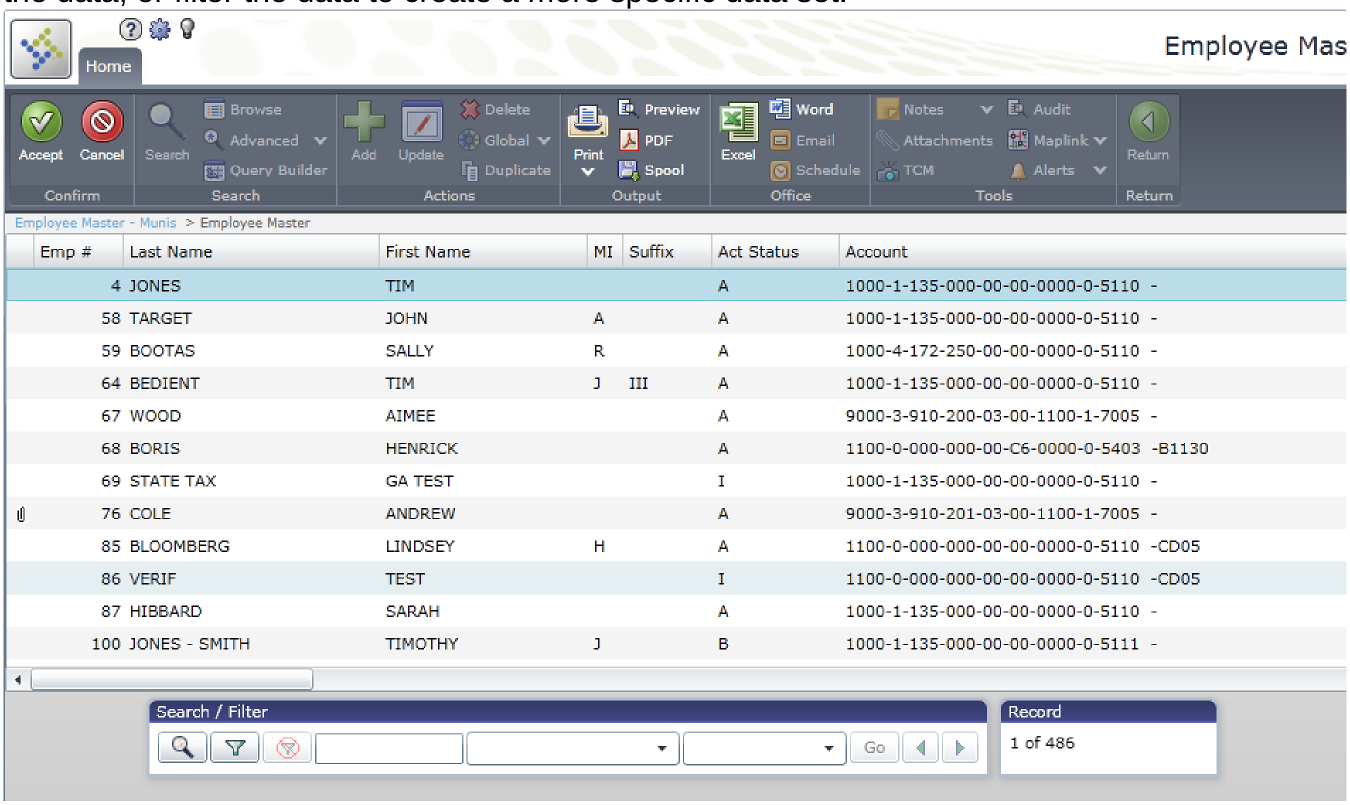
To navigate the active set of records:

- Click First to view the first record in the active set (record 1).
- Click Previous to view record 1 of 5.
- Click Next to view record 2 of 5.
- Click Last to view the last record in the active set (record 5).
- Click Search to create a new active set of records.
- Click Browse to view a list of all records in the active set.

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

Browsing Records

Once you have created an active set of records within a Munis program, click Browse to display the collected data in a table format. You can sort the data, view or hide columns, export the data, or filter the data to create a more specific data set.



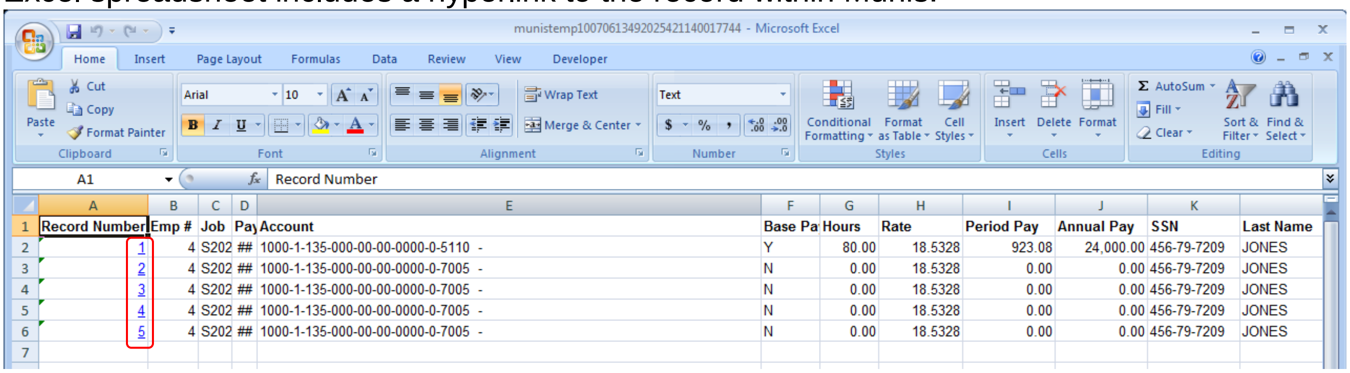
- To view or hide columns, right-click the column headings. Select the columns containing data you wish to view; clear those columns that you wish to hide. Click outside the heading list to display your selections in the revised format. When you create an output file or report from a browse screen, the output does not include columns that you have hidden on the screen display.
- To sort the data, click on 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 and you have Microsoft® Excel 2002 or greater, the program exports the active set of records to 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 allowing you to save the file to your workstation.

Filtering Records

The Munis browse screen includes a filter option that allows you to regroup 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 you wish to filter the data.
4. Click Go to execute 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." Click OK to continue.

Notes:

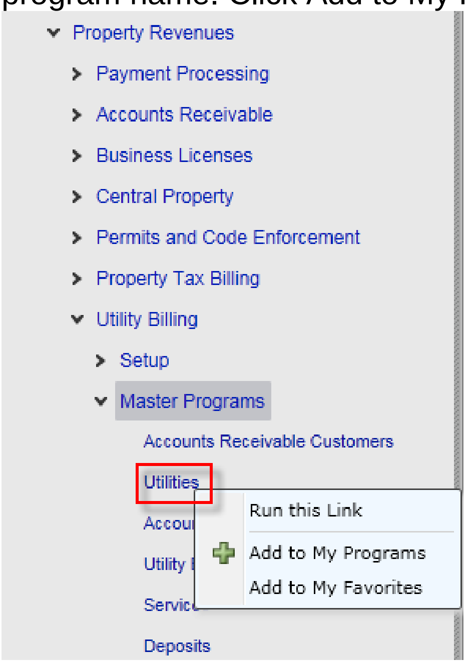
- Filters are not case-sensitive.

- 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.

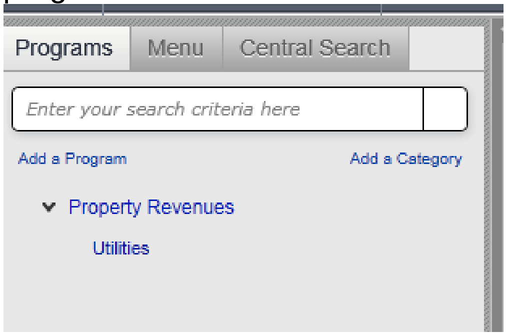
My Programs

My Programs provides easy access to programs that you use frequently. Rather than find these programs on the Munis menus every time you want to use them, you can store them for quick-access on the Programs tab of the Tyler Dashboard.

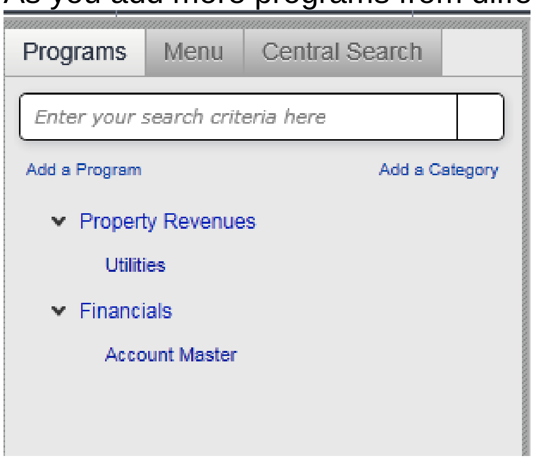
To add a program to the Programs tab, find the program in the menu and right-click on the program name. Click Add to My Programs to add the program to the Programs tab.



Click the Programs tab and the program is available. If the program you select is the first program in a Munis product that you have selected, the program creates a category for the program.



As you add more programs from different products, the program categorizes them as well.



Reports

In many Munis programs, you can create reports by searching for records and then using the Output ribbon button (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.

If 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.

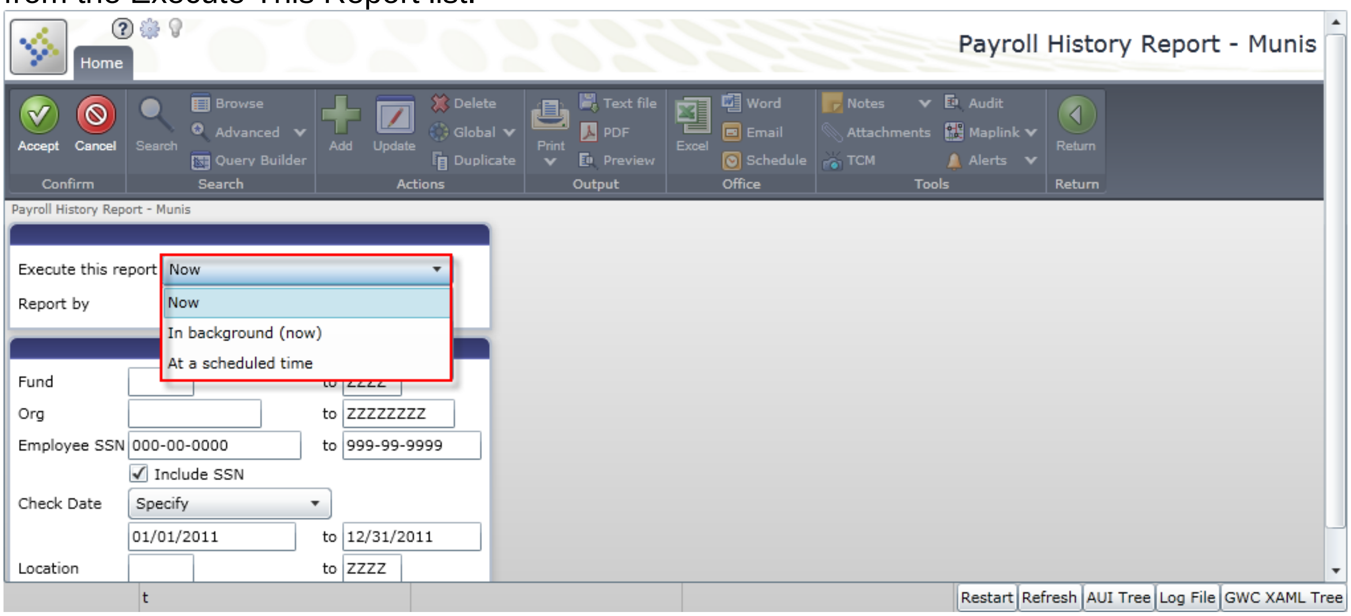
In order to use Scheduler, the Enable Scheduling check box must be selected in the Scheduler Engine program, and Scheduler privileges must be assigned by your system administrator. To receive e-mail alerts, a correct e-mail address must be included in the user record.

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.

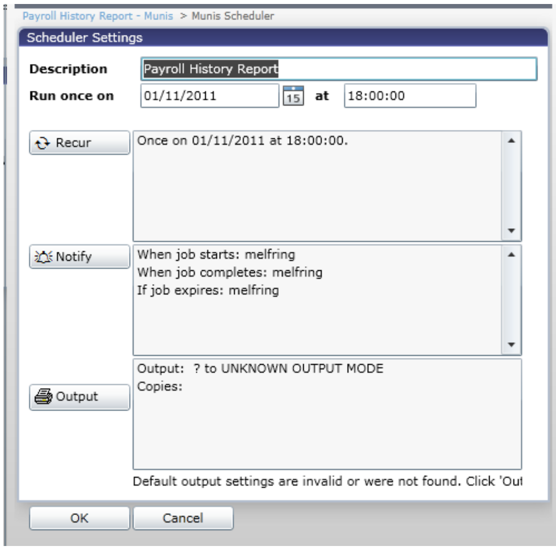
If your organization uses Tyler Content Manager for Munis, you can store reports in the Tyler Content Manager database. If you have the appropriate permissions, you can also include a link to the document in the notification e-mail. You must have the TylerCM Single Document Viewer installed in order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

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.

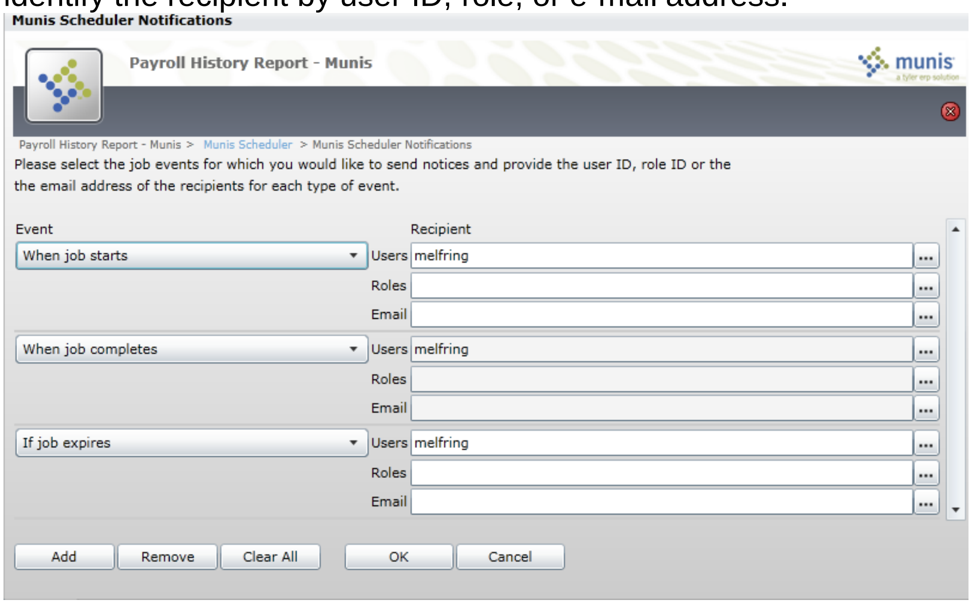
To create a report without using Munis Scheduler, select Now from the Execute This Report list, and then use the Output ribbon buttons to create the report in the appropriate format. To create the report using Munis Scheduler, select In Background (Now) or At a Scheduled Time from the Execute This Report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



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



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 e-mail address.



Tyler Content Manager for Munis

Tyler Content Manager for Munis provides content management capability specific to Munis® programs. It eliminates the shuffle of system-generated reports and forms by automatically transferring them into images for storage and retrieval from the Munis system. These forms and reports are instantly available and linked to your Munis application.

Tyler Content Manager for Munis provides optical character recognition (OCR) and full-text searching. The automatic indexing feature reduces the costs commonly associated with misfiling and retrieval. Each word is indexed for keyword searches so reports and forms can be accessed in seconds.

Using Tyler Content Manager for Munis, you can retrieve GoDoc images for activated modules. You can also send documents from Tyler Content Manager for Munis using Microsoft® Outlook, and you can view related documents such as checks, invoices, and purchase orders associated with a purchase order number, or the 1099 and payroll check information related to an employee number.

To access Tyler Content Manager for Munis, click the Image button on the ribbon. There are four panels on the Tyler Content Manager for Munis:

- Panel 1 - Lists documents matching the search criteria.
- Panel 2 - Includes metadata, or the key fields associated with the document that uniquely link the document to a Munis record. This metadata helps to index, store, and retrieve each individual document.
- Panel 3 - Provides a preview of the selected document image.
- Panel 4 - Provides images related to the selected file.

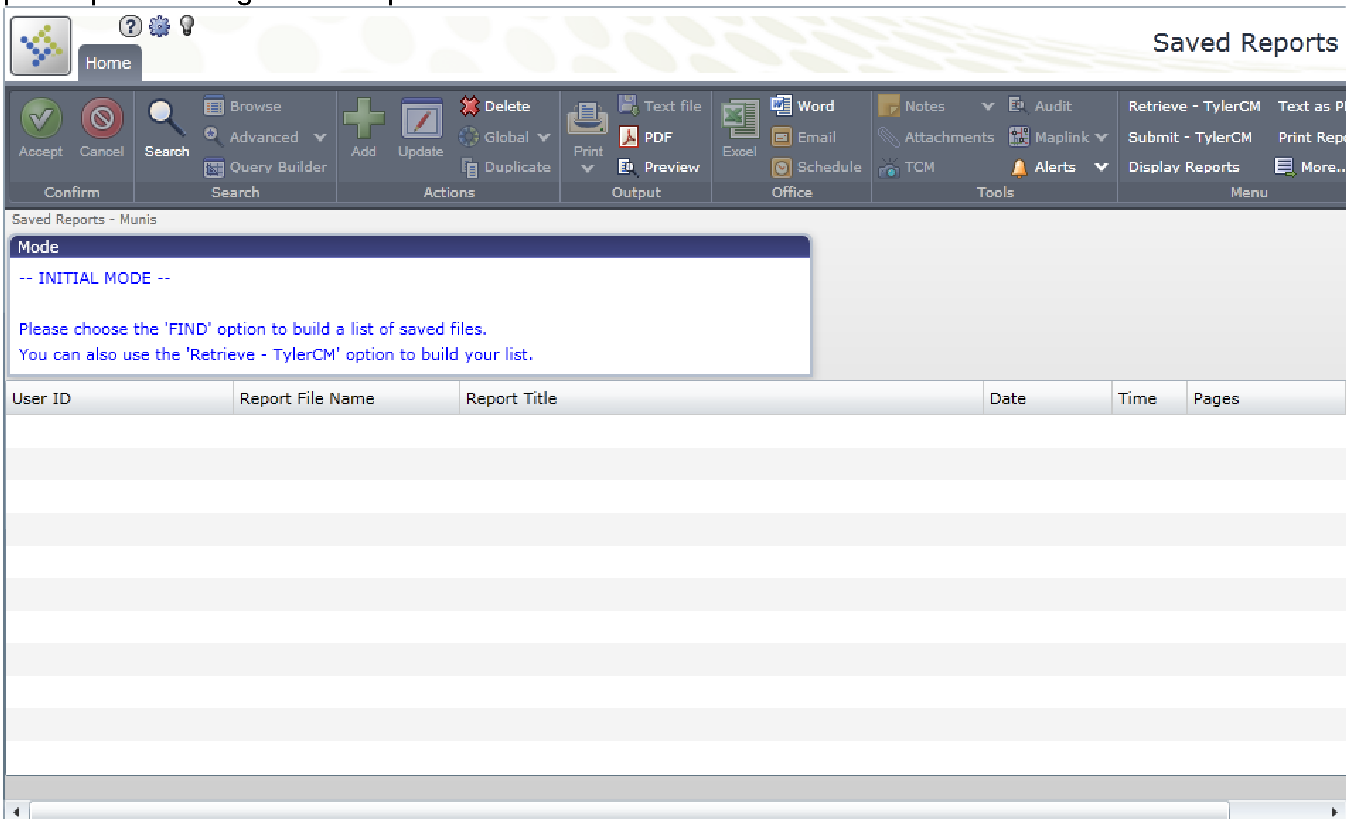
You can resize each panel by sliding the column indicators to the right or left.

- To retrieve a document, find the record in the Munis program to which the content is attached, and then click the image button. Tyler Content Manager for Munis displays a list of documents associated with the record.
- To send a document, select the document from the list in panel four and then drag the document to the Microsoft® Outlook icon on your Quick Launch tool bar. Microsoft Outlook displays an untitled message with the document attached. The document is in PDF format. **Note:** Do not drag and drop the file to a minimized Microsoft Outlook session; the files will not attach.
- To view a related document, click View Related Document or View Related Web. If you click View Related Document, the document related to the purchase order displays in panel four. If you click View Related Web, related documents display in a graph format. Right-click a document identifier for additional options such as Preview Document or Open.

If your organization uses a Laserfiche® content manager, the program retrieves a laserfiche document when you click the Image button.

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.

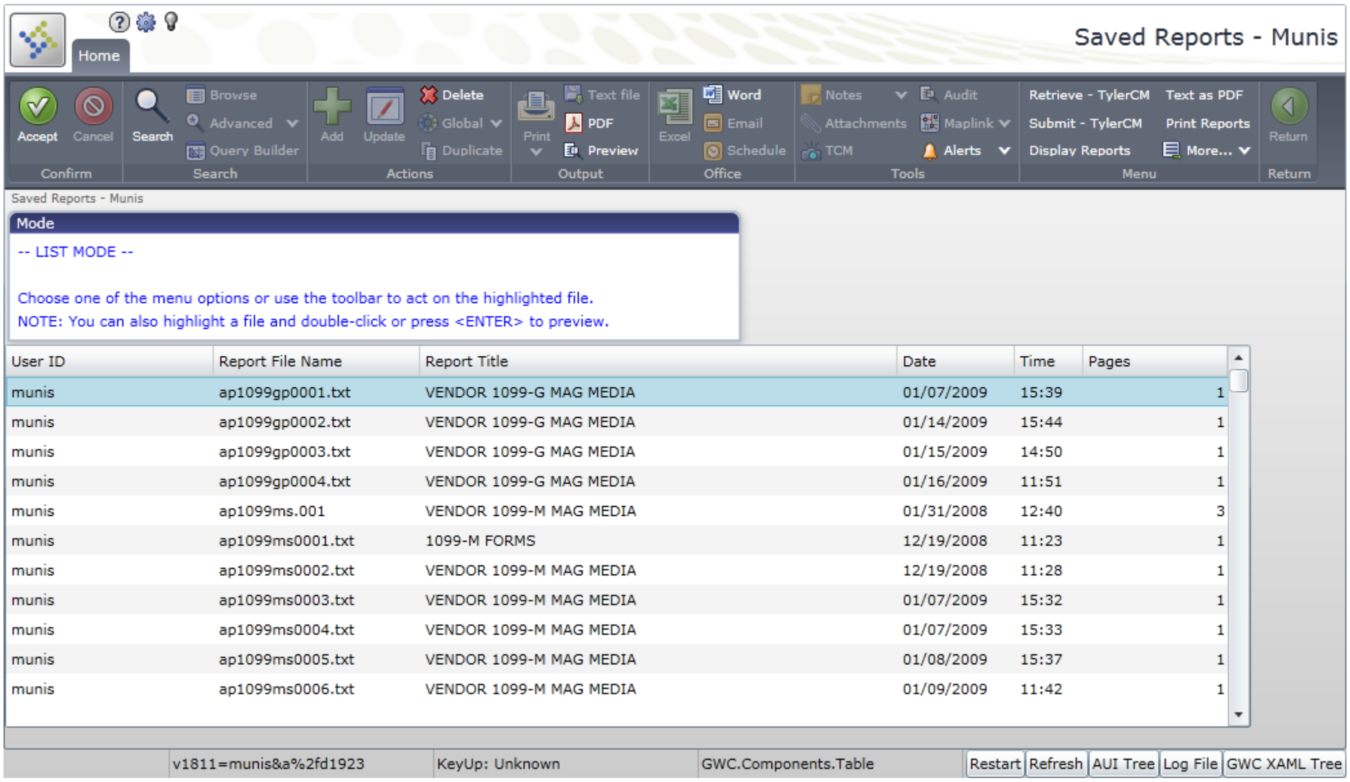


If your organization uses the Tyler Content Manager for Munis or the Laserfiche® content management system, you can use the Saved Reports program to submit or retrieve documents from these systems.

The Saved Reports program provides content submittal and retrieval using Tyler Content Manager for Munis or Laserfiche®, according to the settings applied in the System Settings program.

If your organization uses Tyler Content Manager for Munis, 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.



Click Display Reports 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 File Ranges, complete the Start and End boxes with the page or line numbers that you want to view for each file. You can click Select All to select all of the files; you can 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. You can 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.

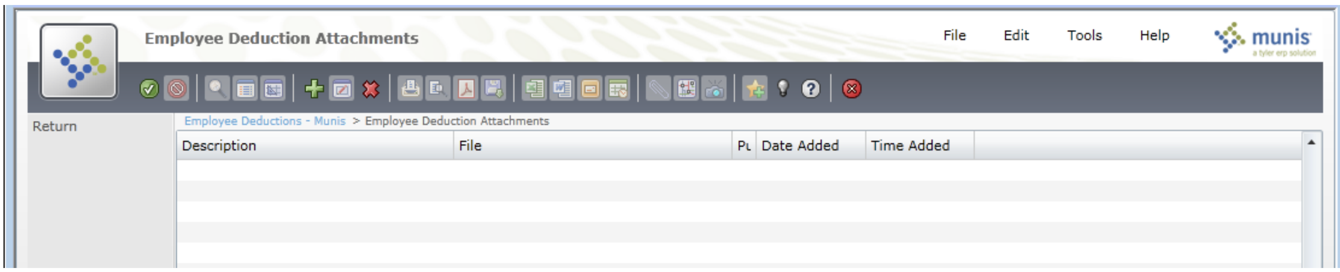
Click Select All to selects all the reports in the list, or click Select None to clear the check boxes.

Attachments, Excel, and Word

The Attachments, 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. The options must be activated by your system administrator in order to be available. You must also have Microsoft Word and or Microsoft Excel installed on your computer to use those two functions.

Attachments

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

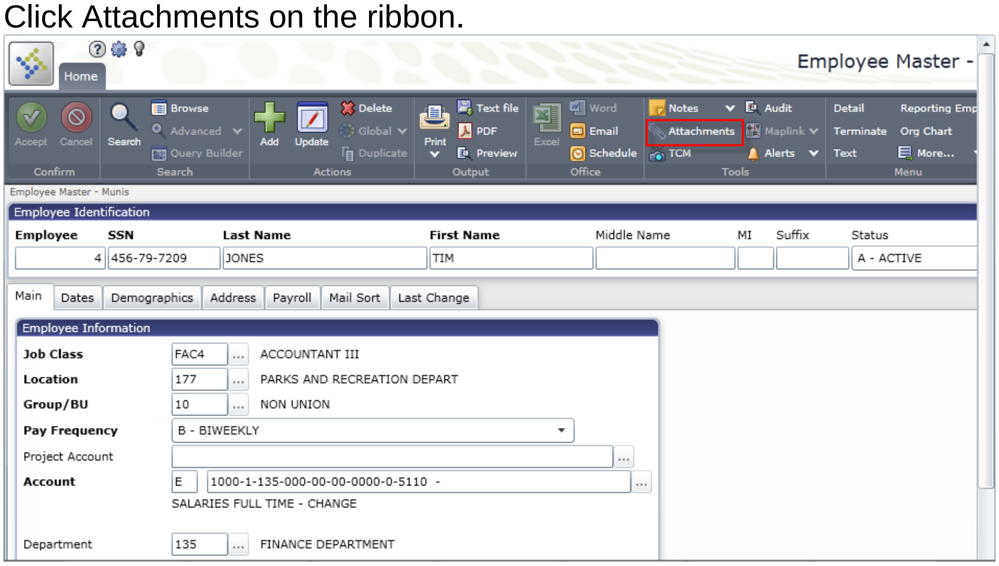


If your organization uses Tyler Content Manager for Munis, the Attach program features are replaced by Tyler Content Manager options.

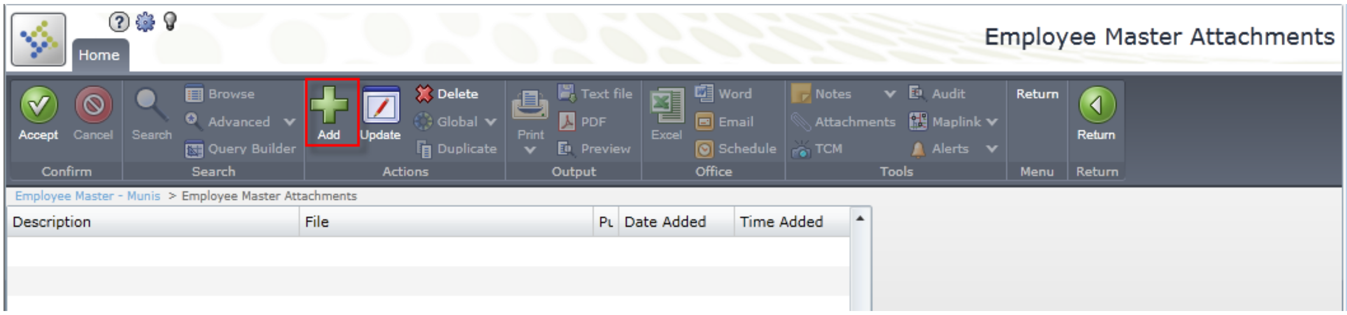
If your organization uses Munis Self Service for Applicant Processing and applicants submit resumes or other documents, the Attach program automatically attaches these files directly to the application.

To attach a document to a record:

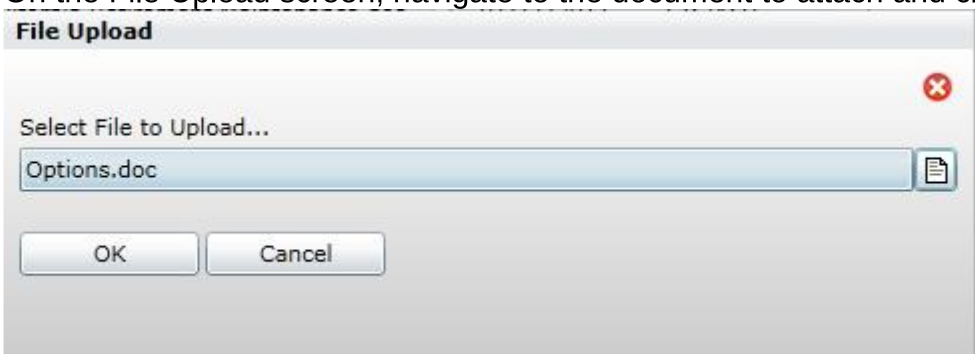
1. Click Attachments on the ribbon.



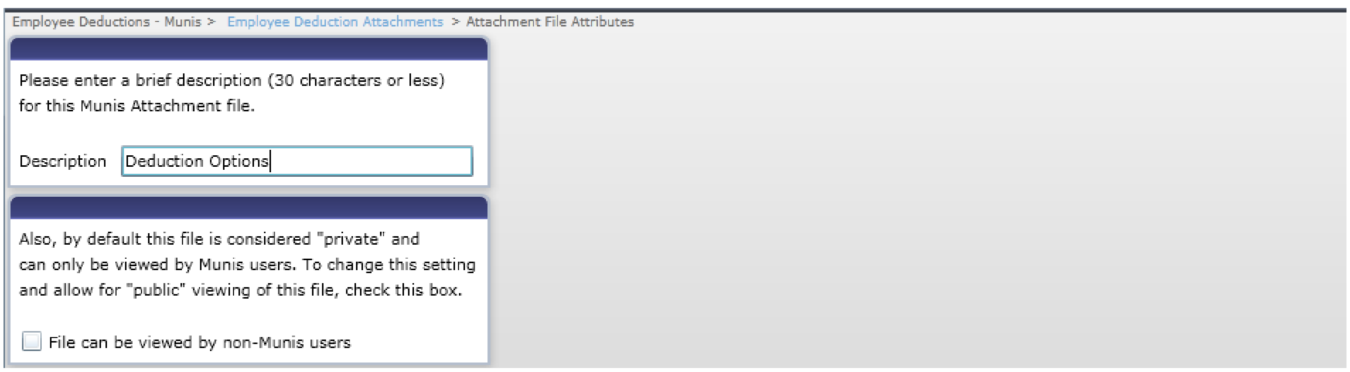
2. Click Add on the Attachments screen.



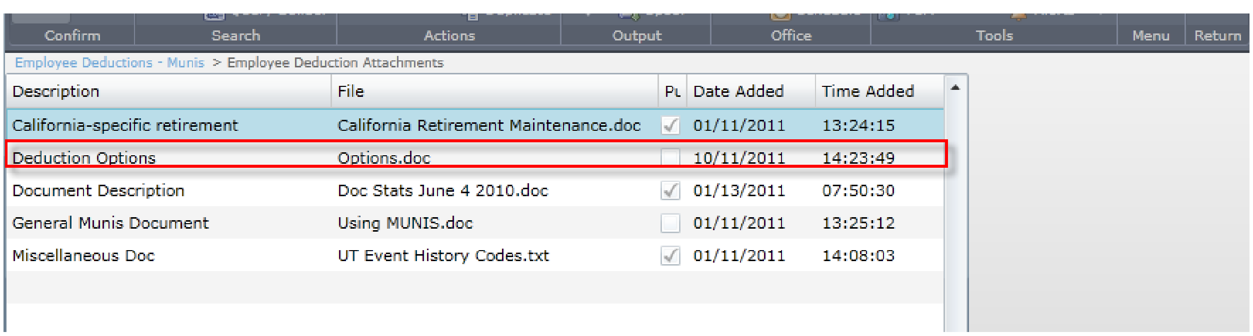
3. On the File Upload screen, navigate to the document to attach and click OK.



4. In the Description box, enter the document title as it should appear in the Attachments list.



5. Select the File can be Viewed by non-Munis Users check box to make document available from other applications, such as Munis Self Service applications.
The program adds the document to the attachments list.



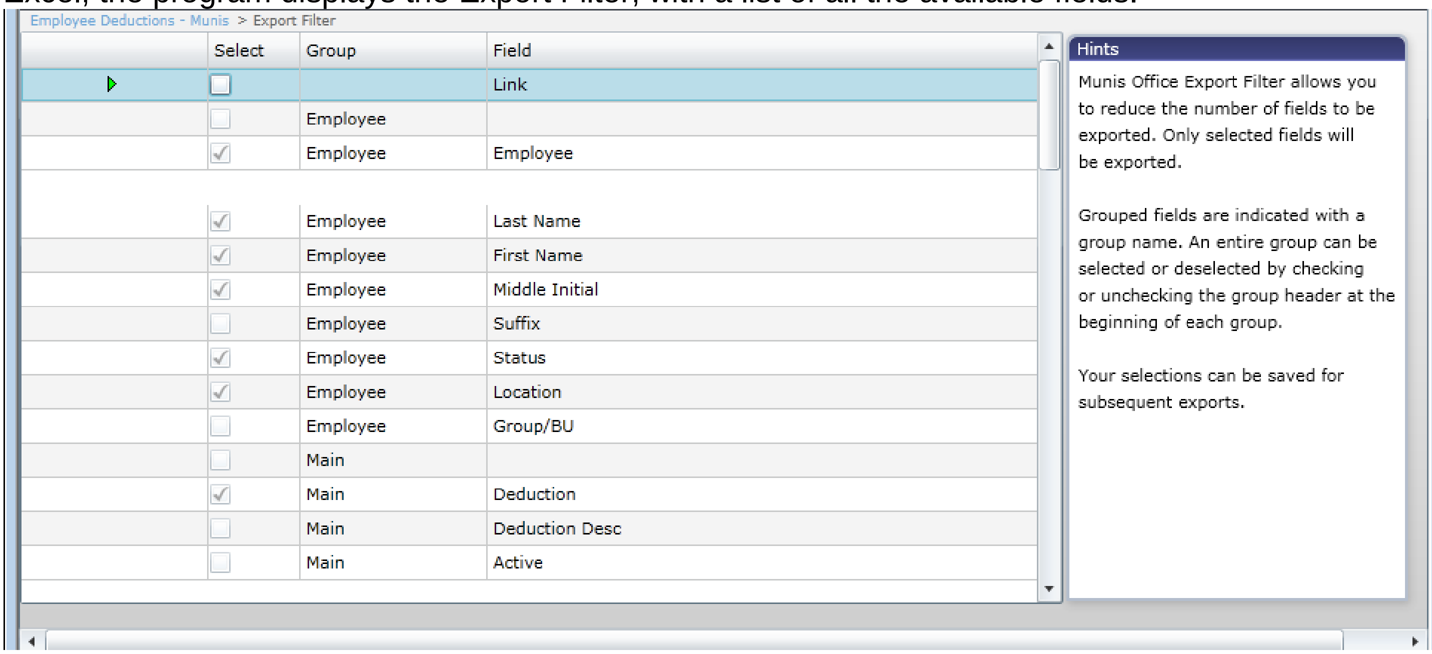
- To remove an attachment, click the Attachments button on the ribbon, highlight the document to remove from the Attachments screen, and click Delete.

- To view an attachment, click the Attachments button on the ribbon, highlight the document to view, and click Accept.

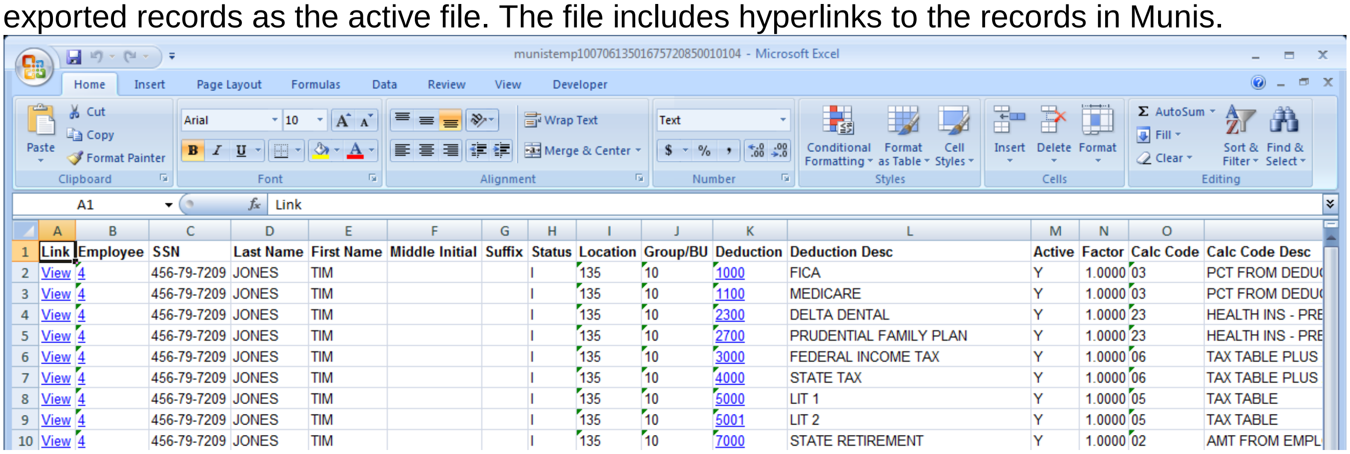
Excel

The Excel option that is available through the Munis master programs provides different options than the Excel export accessed from the Munis browse screens. When you create a report within a program, or when you are completing a specific report or inquiry program, the Excel ribbon button allows you to export collected data into Excel columns, where you can manipulate the data according to your requirements. The program provides an Export Filter where you can select the values to 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. The file includes hyperlinks to the records in Munis.



Word

Word exports the active set of records into Microsoft® Word Mail Merge. When Mail Merge opens, the Template Options tab is active. On this tab, you can select a template to use for a specific report. 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.

The Template Library option is available on the Template Options tab. This option allows you to view starter templates associated with the program. These templates are stored in the Munis KnowledgeBase and are not available for every program. When you click Template Library, the Munis KnowlegeBase opens and displays a list of all of the templates available for the program.

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

To export records directly into a Microsoft Word document:

1. Select No Template (Raw Data) from the Template to Use list on the Template Options tab.
2. Click Use.
   Microsoft Word opens with the selected report as the active document.

Note:
The file created during export is automatically saved in the directory where the Munis software is installed. Click Save As from the File menu to save the file to another directory.