DISTRICT SCHOOL BOARD OF PASCO COUNTY

MUNIS QSG

QUICK START GUIDE

Activity: Munis 11.1 Dashboard Navigation and Setup

Munis Dashboard

Many of the following instructions require the ability to right-click. Trackpad users who do not have a left and right click option can often simulate a right-click by placing two fingers on the track pad and clicking with a third. Mac users who have a single-button mouse can change the settings of the mouse through System Preferences to enable a right-click option.

Set Up Workflow

1. Click on **Web Parts** – it is located in the upper-right corner of the ribbon
2. Click on **MUNIS Workflow** under the **Munis** tab
3. Click on **Approvals (Tile)** to add the **Approvals** web part to your dashboard
4. Click and hold on the **Approvals (Tile)** box that has populated in the **Left Tile** box, then drag to the desired location
5. Click on **Notifications (Tile)** to add the **Notifications** web part to your dashboard
6. Click and hold on the **Notifications (Tile)** box that has populated in the **Left Tile** box, then drag to the desired location
7. Click **Update** to save and apply all changes made

This process can be repeated to add other web parts as desired. Click on the category that contains the web part, then click on the web part to add it to the dashboard. It can be relocated by dragging the item and dropping it in the intended location.

Web parts already added can be moved at any time by opening the Web Parts menu back up, and dragging the item to the desired location.

To delete a Web Part, enter the Web Parts menu and right click the web part to be deleted. Select **Delete this Web Part** to delete the chosen item. To hide a web part from view on the dashboard but leave it present for later use, click **Hide this Web Part** instead. A hidden web part can be displayed again by selecting **Show this Web Part** from the right-click menu.

Approve or Reject From Approvals Web Part

1. Click on the **Approvals** web part in the dashboard
    a. Click on an item to view more detail in the right-hand panel
    b. Click the check box next to the item to be approved or reject – multiple boxes can be checked to approve or reject multiple items at once
    c. Click on **Approve** or **Reject** in the lower-right section of the panel
    d. Input a comment in the dialogue box that appears (required for Rejections, optional for Approvals)
    e. Click **Save**
    f. Click **Close** to exit the approvals tile, or repeat from step a to perform additional approval or rejection actions

Forward Approvals to Another User

1. Right click on the **Approvals** web part
2. Click **Configure Tile Settings**
    a. Click the **Turn On Forwarding** check box to enable forwarding
    b. Select the forwarding recipient from the drop-down menu
    c. Click **Save**

Cancel Forwarding

1. Right click on the **Approvals** web part
2. Click **Configure Tile Settings**
    a. Click the check mark next to **Turn On Forwarding**
    b. Click **Save**

Access the Tyler Menu (formerly referred to as the Munis Menu)

1. Log into Munis
2. Click on **Tyler** Menu, which is located in the upper-right corner of the dashboard
3. The **Tyler Menu** appears in the center of the screen

Add specific Munis menu items to My Favorites and My Programs

1. Access the **Tyler Menu**
2. Locate the menu item to be added to **My Favorites** or **My Programs** within the **Tyler Menu** via the expanding sub-menus or by using the **Search** function
3. Right click the menu item to be added
    a. Click **Add to My Programs** to add the menu item to **My Programs**
    b. Click **Add to My Favorites** to add the menu item to **My Favorites**
4. The menu item is added to **My Programs** and/or **My Favorites**, which are located on the left-hand side of the Munis Dashboard
    a. Menu items added to **My Programs** are sorted by category (such as Financials)
    b. Menu items added to **My Favorites** are placed in the My Favorites category

Manipulate the My Programs and My Favorites list

1. Click on **Edit Favorites**
    a. A list of all menu items added to **My Favorites** and **My Programs** is generated
    b. If no menu items have been added, the list will be empty
2. Add a custom category
    a. Click on **Add Category**
    b. Enter the desired name for the custom category in the **Category** field
    c. Click **Save Category**
    d. The category is added to the **My Programs** list
3. Move a category
    a. Click and hold the category header
    b. Drag the selected category to the intended location
    c. Release the mouse button
    d. The category will move to the indicated location
4. Change a category name
    a. Right click on the category header of the category to be renamed
    b. Click on **Edit this Category**
    c. Enter the new category name in the **Category** field – this will not rename the category in the Munis menu
    d. Click **Save Category** to finalize changes or **Cancel** to discard them
5. Remove a category
    a. Right click on the category header of the category to be removed

    b. Click on **Delete this Category**
        i. Category will be removed from **My Programs**
        ii. The menu items within the removed category are also removed from **My Programs** – the menu items are **not** affected in the **Tyler Menu**

6. Move a menu item
    a. Click and hold the menu item name
    b. Drag the selected menu item to the intended location – they can be moved within the category or moved to other categories
    c. Release the mouse button
    d. The menu item will move to the indicated location
7. Change a menu item name in **My Favorites** and **My Programs**
    a. Click on the menu item to be renamed
    b. Input the new name in the **Program Name** field – this will not rename the menu item in the Munis Menu
    c. Click **Save Favorite** to finalize changes or **Cancel** to discard them
8. Remove a menu item from **My Favorites** and **My Programs**
    a. Click on the menu item to be removed
    b. Click **Delete Favorite**
9. Click **Close** once finished

The **Edit Settings** button in the **Edit Favorites** menu is not used.