

Munis 101 – City of Tulsa

OVERVIEW

This hands-on lab will provide a basic overview of Munis from learning your new user name and logging into Munis to navigating and using Munis programs. This session is a prerequisite to the follow-on functional training you will receive.

MUNIS USER NAME & PASSWORD

Our first task in Munis 101 is to learn your Munis User Name and establish a new password for your account. First some information about your Munis User Name.

User Name & Passwords:

Your Munis User Name (login ID) matches your City of Tulsa login ID with “4934” preceding it. For example:

<u>Tulsa ID</u>	<u>Munis ID</u>
susansmith	4934susansmith
dpharis	4934dpharis
jakeebrown	4934jakeebrown

Your Munis password remains in place for 90 days upon which you will be prompted to change it. The password must meet the following requirements

User passwords must meet the following requirements:

- Be at least 8 characters long.
- The password must contain characters from at least three of the following four categories:
 - English uppercase characters (A - Z)
 - English lowercase characters (a - z)
 - Base 10 digits (0 - 9)
 - Non-alphanumeric (For example: !, \$, #, or %)
- The password does not contain three or more characters from the user's account name.

Munis 101 – City of Tulsa

Changing Your Password:

1. Double click the Change Munis Password icon to access the password change screen:
2. This opens the Munis Password window

The screenshot shows the Tyler Technologies Munis SaaS Dashboard. At the top left is the Tyler Technologies logo. The main heading is "Munis SaaS Dashboard". Below this, there are fields for "User: ...", "Client: ...", and "Name: ...". A "Status:" field is present. The main form area contains four input fields: "User Name:" with the value "4934bpelletier", "Current Password:" with masked characters, "New Password:" with masked characters, and "Confirm Password:" with masked characters. A blue "Submit" button is at the bottom right of the form.

- a. User Name: Enter your User Name as noted above in **Login ID**
- b. Current Password: Your default password is: *NeedNew1*
- c. New Password: Enter a password that meets the above requirements
- d. Confirm Password: Type in same as New Password
- e. Click Submit to change your password

Note: *Please remember this password as you will use it during functional training!*

3. If your password was successfully changed you will see the following panel:

The screenshot shows the Tyler Technologies Munis SaaS Dashboard login screen. At the top right is a "[Log In]" link and a gear icon. The main heading is "Munis SaaS Dashboard". Below this, there are fields for "User: ...", "Client: ...", and "Name: ...". The "LOG IN" section is active. A "Status:" field displays the message "Your password has been successfully reset." Below this is an "Account Information" section with "Username:" and "Password:" input fields. A blue "Log In" button is at the bottom. A note at the bottom states: "Note: You do not have to put datacenter/ before your username."

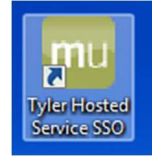
4. Close this Internet Explorer window

Munis 101 – City of Tulsa

LOGIN INTO MUNIS

Your typical login will occur using a Single Sign On (SSO) program.

5. Double click on the Single Sign On icon located on the desktop. It reads Tyler Hosted Service SSO. This is how you will login to Munis



6. You are presented with the SSO login window:

A screenshot of a web browser window titled 'Tyler Hosted Services Single Sign On'. The window has a blue header with the Tyler Technologies logo and the tagline 'Empowering people who serve the public'. Below the header, there are four input fields: 'Client Type' with a dropdown menu showing 'Dashboard', 'Select Environment' with a dropdown menu, 'User Name' with the text '4934bpelletier', and 'Password' with a masked field of dots. To the right of the input fields is a gear icon. At the bottom, there are two buttons: 'Go!!' and 'Cancel'.

- a. Make sure the Client Type is “Dashboard” selectable from the dropdown list
- b. Type in your User Name and Passowrd
- c. Click **Go!!** to login

Munis 101 – City of Tulsa

TULSA ENVIRONMENTS

The City has several environments for production work as well as areas to become familiar or test processes. The environments appear upon successful login:

Welcome: DATACENTER\4934impl
Your Munis password expires in 4 days.

tyler technologies Munis SaaS Dashboard

User: 4934impl | Client: MU4934 | Name: Tulsa (City Of), OK

Notification: Your password will expire in 4 days. Please consider changing your password using the icon.

Select an environment

Name	Description
EnerGov Live	EnerGov Live
EnerGov Train	EnerGov Train
EnerGov Test	EnerGov Test
TT - v11.2 Bravo	TT Database Bravo
Live - v11.2	Live Database
Train - v11.2	Train Database
Test - v11.2	Test Database
IMPL - v11.2	IMPL Database
SP - v11.2 Delta	SP Database

Note: You must login to this page first. If you do not you will not be prompted to change your password. Direct shortcuts to a dashboard page will not allow users to change their password, or notify the user if the password has expired.

Use TT Database Bravo for this training

Your ID and password expiration appear here!

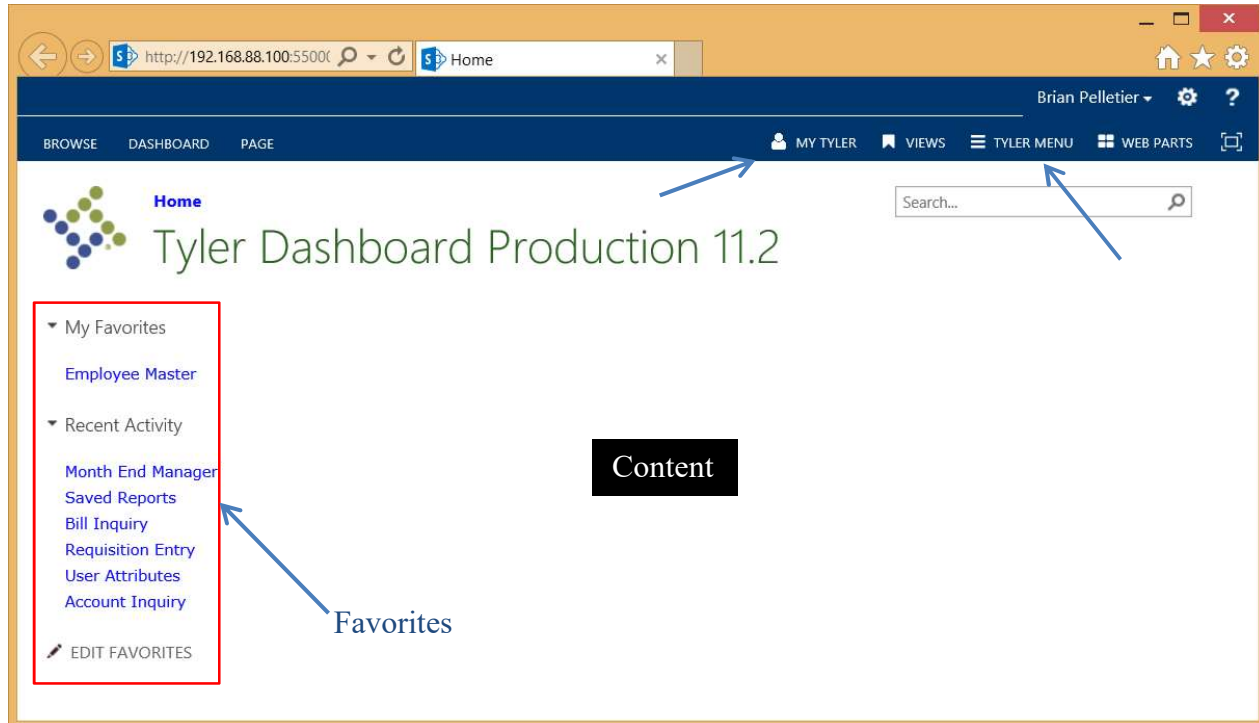
To change your password click here!

7. Select the Bravo Environment by clicking the underlined text TT – v11.2 Bravo. This will present you with the Munis dashboard for the Bravo Environment

Munis 101 – City of Tulsa

MUNIS DASHBOARD

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



- | | |
|-------------------|--|
| 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 |
| Tyler Menu | Opens a panel with Tyler menus and includes a search function |

DASHBOARD NAVIGATION

Munis Dashboard runs within a browser. Here are a couple of points in navigating the dashboard:

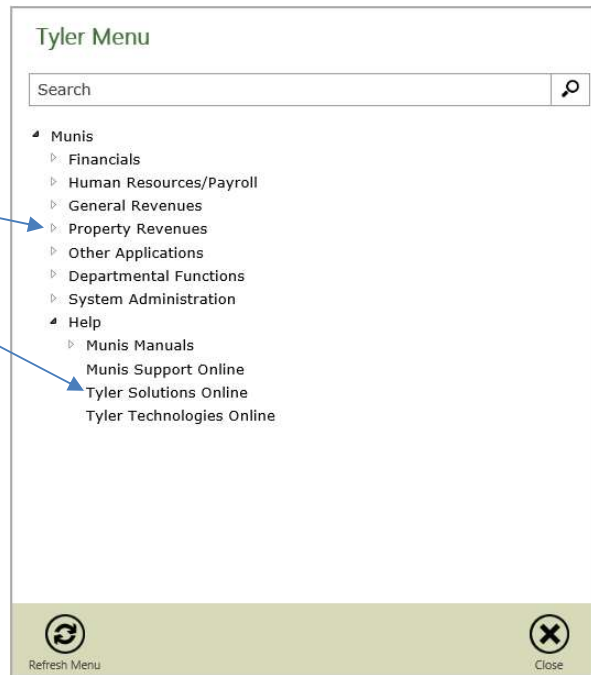
- Most all items in the dashboard are links and as such require just a single click to select
- After selecting an option there will be a brief delay while the information appears or the program loads.
- The dashboard is intended to be customized by each user. Spend time customizing it to gain the most benefit from it.

Munis 101 – City of Tulsa

TYLER MENU

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

- A menu item with a triangle to the left is a menu that contains other menu items
 - If the menu item has no triangle it is a program
 - Clicking on a menu option expands the menu and clicking on it a second time collapses it
8. Navigate/Open the Departmental Functions menu
 9. Try navigating to other menus



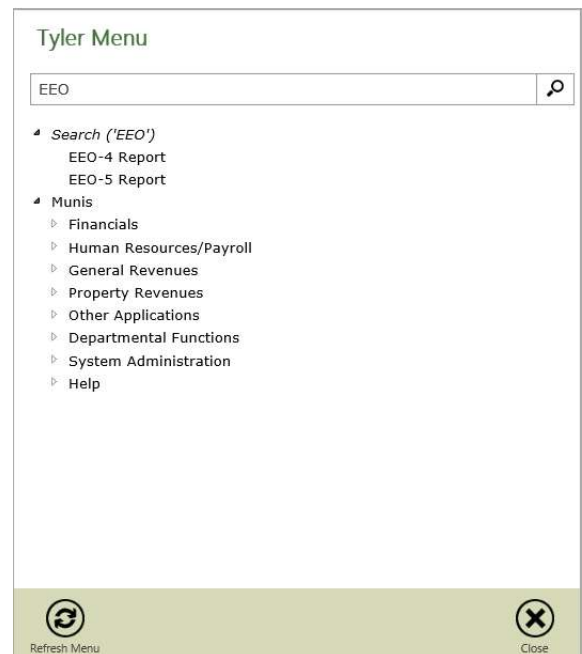
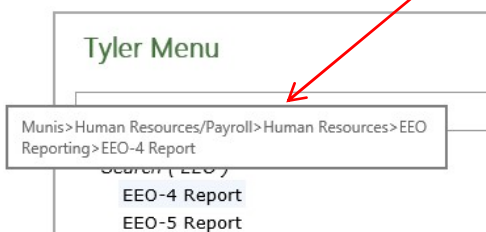
Search Menu/Programs

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 to locate available options.

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

10. Click in the Search box, type "Account" (no quotes) and press Enter or click the magnifying glass

- Hover over option to see menu path



Munis 101 – City of Tulsa

DASHBOARD 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.

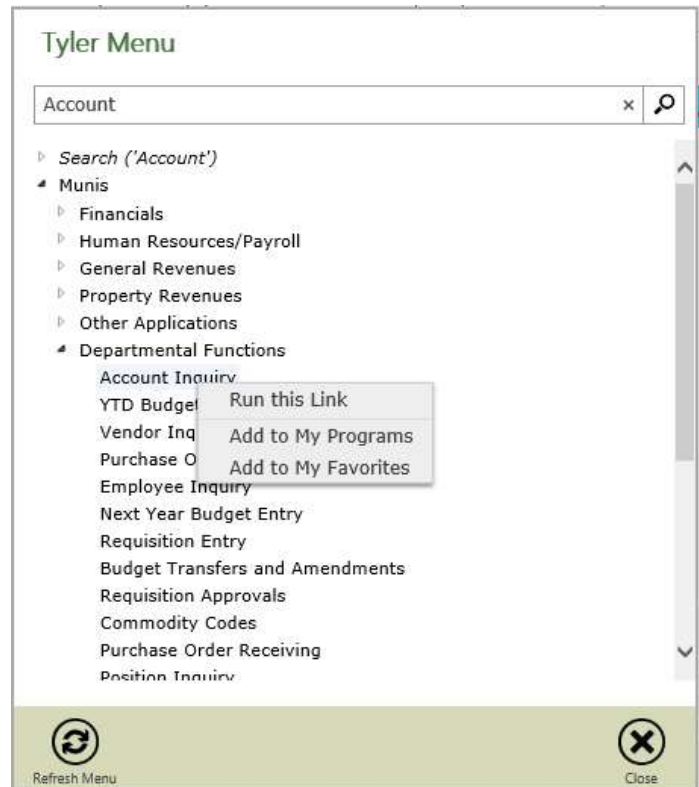


Adding Favorites

The easiest way to add favorites is:

- Locate the program in the Tyler Menu
- Right click on a program
 - a. Select Add to My Favorites to add to the list of My Favorites
- The program is automatically added to the My Favorites menu

11. Add a program from the Departmental Functions menu to My Favorites
12. Navigate to another menu and add a program to My Favorites



Munis 101 – City of Tulsa

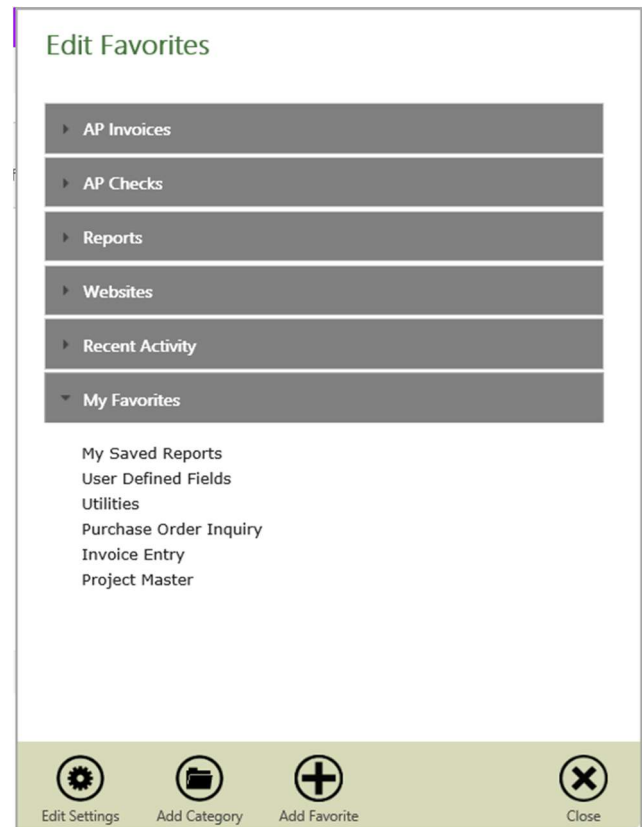
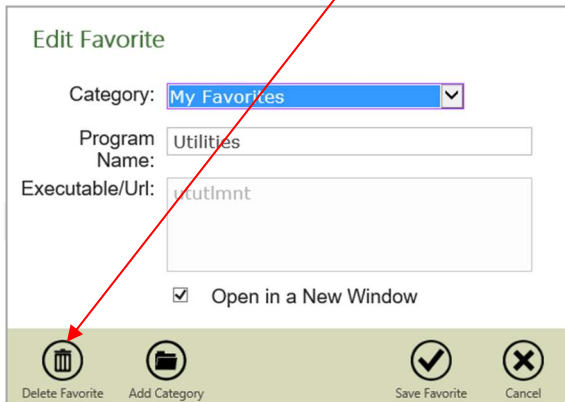
Deleting Favorites

You may add a Favorite accidentally or later realize you don't need it. To delete a Favorite

13. Click the Edit Favorites option at the bottom of the My Favorites column. This opens a panel to manage Favorites



14. Click on the Favorites entry you wish to remove and click the Trash Can icon



Munis 101 – City of Tulsa

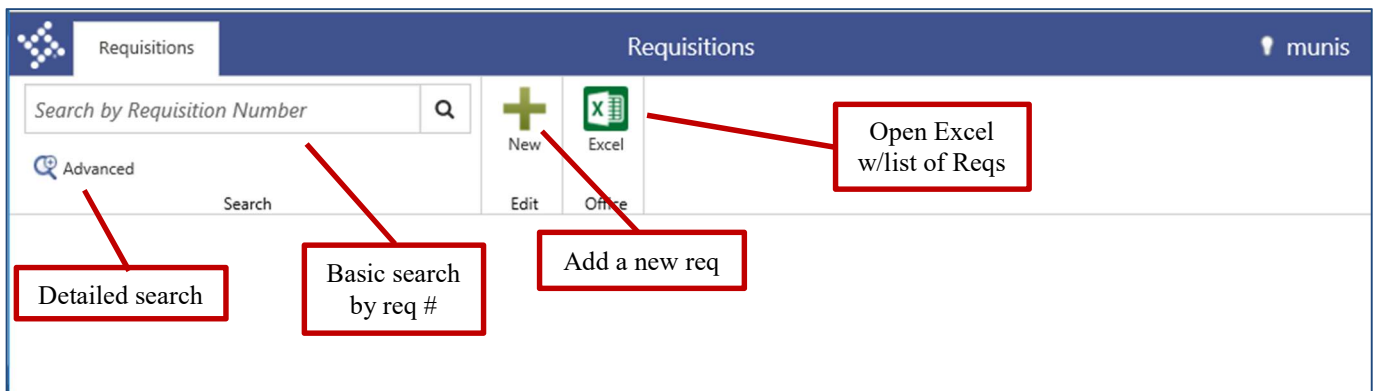
Opening a Munis Program

Opening a Munis program involves clicking on the option in your Tyler Menu, or selecting it from your Favorites or Recent Activity in the dashboard. It may take a few moments to open the Munis program. Munis contains different types of programs and they may open a little different.

15. Navigate to Financials > Purchasing > Purchase Order Processing
16. Single click on the Requisitions program

MUNIS WEB BASED PROGRAMS

A growing number of Munis programs are written in a web based, point and click, language. This program, the Requisitions program is designed to allow users an easy entry point to enter a purchase requisition.



17. Search on Requisitions numbered greater than 1 (>1). This will find all requisitions

Presents a list of all requisitions meeting this criteria:

Requisitions: 179 Items Per Page 15

Requisition	Department	Vendor	Am(s)	Status	Bid Number	Description	Amount	Copy
(2018) 20180145	(21) Police	(1073) WOODALL	4	Allocated		drug dogs	\$15,150.00	
(2018) 20180142	(12) Finance	(1) PURPLE GLAZE	1	Converted		STUFF OFF CONTRACT	\$5,000.00	
(2018) 20180141	(12) Finance	(84) AIRGAS SPECIALTY PRODUCTS	8/28/2017	1	Converted	AIR COMPRESSORS AND ACCESSORIES	\$1,300.00	
(2018) 20180140	(52) Working in	E PRODUCTS, INC	8/28/2017	1	Converted	Address - Name	\$4,500.00	
(2018) 20180138	(12) Finance		8/28/2017	0	Created		\$0.00	
(2018) 20180132	(52) Working in Neighborhoods	(755) ALLWINE ROOFING & CONSTR...	8/28/2017	1	Converted	HUD HOME GRANT - HOMEOWNER REPAIR	\$24,599.00	
(2018) 20180130	(52) Working in Neighborhoods	(173) HOOD CONSTRU		Converted		HUD HOME GRANT - HOMEOWNER REHAB	\$1,500.00	
(2018) 20180126	(12) Finance	(13) HD SUPPLY WATER		Converted		90 DEG. STREET BEND C X M 1-1/2" X 1-1/2"	\$3,651.00	
(2018) 20180124	(12) Finance	(13) HD SUPPLY WATERWORKS LTD	8/28/2017	1	Converted	Service Coupling 1"	\$715.50	
(2018) 20180122	(12) Finance	(13) HD SUPPLY WATERWORKS LTD	8/28/2017	1	Converted	BLANKET FOR INVENTORY	\$50,000.00	
(2018) 20180121	(33) Water and Sewer	(136) QUARRY LANDFILL A WASTE...	8/28/2017	1	Released	ROADSIDE, GROUNDS, RECREATIONAL AND PARK AREA SERV	\$100,000.00	
(2018) 20180120	(33) Water and Sewer	(565) WELS	2017	1	Converted	WELDING EQUIPMENT AND SUPPLIES	\$44,402.00	
(2018) 20180119	(33) Water and Sewer	(673) VICT	2017	1	Released	WELDING EQUIPMENT AND SUPPLIES	\$4,402.00	

Grid or block presentation

reqs returned

Click to access a req

Pages with other reqs

18. Click on the Grid presentation icon to switch to Block View

19. Click again to return to Grid View

Munis 101 – City of Tulsa

20. Click a requisition number (blue number in left column) to open a req

The window contains some on-screen interactive options (during add/update):

- [Vendor Quotes](#) - Blue text is a link to additional screens to view/add information
- [\(0\)](#) - The number in parenthesis indicates one or more records associated with the blue text link
- - The calendar icon allows selection of a date from a calendar. You can choose to type a date in the field
- - The ellipses provides access to a list of valid options for this field
- - Dropdown allows user to select from a dropdown list
- - Provides access to Help

Requisitions > Details

The Details page provides the completed requisition fields for existing requisitions or blank requisition fields for new requisition. If your organization uses custom requisition forms (for example, individualized forms for specific departments), use the Custom Interface option in the Menu group of the ribbon to select the applicable interface. When a custom interface is applied, the available fields vary. The Menu group of the ribbon also includes the Mass Allocate, Duplicate, and Notes options:

- Mass Allocate—Allows you to add or remove multiple allocations (project string or GL account) for a requisition.
- Duplicate—Creates a copy of the select requisition, allowing you to assign a fiscal year (current or next) and creation date.
- Notes—Provides associated notes and comments for review.

The Workflow group of the ribbon includes the options for releasing and approving requisitions.

Field	Description
Fiscal Year	Specifies the fiscal year for the requisition.
Requisition	Identifies the requisition number. According to your settings, the program either completes this number automatically with the next available number or you can enter the number manually.
Created Date	Contains the date the request was created.
Department	Identifies the department making the request. Click the field help button to select a different department; click View to see details for the selected department. The program enters the department from your user ID as the default value, but you can change it.
Commodity	Identifies the commodity code for the item being requested. Click the field help button to select a code; click View to see details for the selected commodity.
Description	Provides a general description of the request.
Buyer	Identifies the buyer for the item. Buyers are potentially notified at various points in the purchasing process based on your organization's settings.
Type	Designates the type of request: Blanket, DeptEmergency, Exported, Normal, or RFP-Bid. Request types are typically used for reporting and grouping purposes.
Purchase Order	Contains the purchase order number created when the request was converted. This box is not accessible, and will be blank until the request is successfully converted to a purchase order.
Review	Indicates the review status for the request, if applicable.
Needed By	Sets the date by which the request is needed.
Notification Threshold %	Determines at what expenditure amount notifications are sent to the requester after the request is converted to a purchase order, and then liquidated with an invoice. The percentage is transferred to a purchase order during the conversion process.

21. Click the Tyler logo > click Help and review the available help screens

Munis 101 – City of Tulsa

MUNIS TRADITIONAL PROGRAMS

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

22. Navigate to Departmental Functions > Account Inquiry

The screenshot shows the 'Account Inquiry - Munis' window. The interface includes a ribbon at the top with various tool icons, a form for account details, and a data table. Callouts point to specific features:

- Ribbon:** Points to the top toolbar containing icons for Accept, Cancel, Search, Query Builder, Add, Update, Delete, Global+, Duplicate, Print, Text file, PDF, Excel, Word, Email, Attach, Notify, Maplink, Alerts, Detail, Project Strings, Months, User Defined Fields, and Return.
- Tabs:** Points to the '4 Year Comparison', 'Current Year', and 'History' tabs.
- Embedded links/buttons:** Points to small icons within the data table cells.
- Navigation Area:** Points to the bottom navigation bar showing '1 of 25' and navigation arrows.

Yr/Per 2017/13	Fiscal Year 2017	Fiscal Year 2016	Fiscal Year 2015	Fiscal Year 2018
Original Budget	.00	.00	.00	.00
Transfers In	.00	.00	.00	.00
Transfers Out	.00	.00	.00	.00
Revised Budget	.00	.00	.00	.00
Actual (Memo)	.00	.00	.00	.00
Encumbrances	.00	.00	.00	.00
Requisitions	.00			.00
Available	.00	.00	.00	.00
Percent used	.00	.00	.00	.00

Learning the available functions and fields

Many programs have a method to gain information about the program.

- The icon in the upper right corner provides information about the program
- Another source of information is tool tips. Simply hover over a field, icon, link, command etc. to see a brief description:

Find Data

23. Click the Search icon and in the Org Code field enter 1225331 and click

Account

Fund

Org

Object

Munis 101 – City of Tulsa

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:

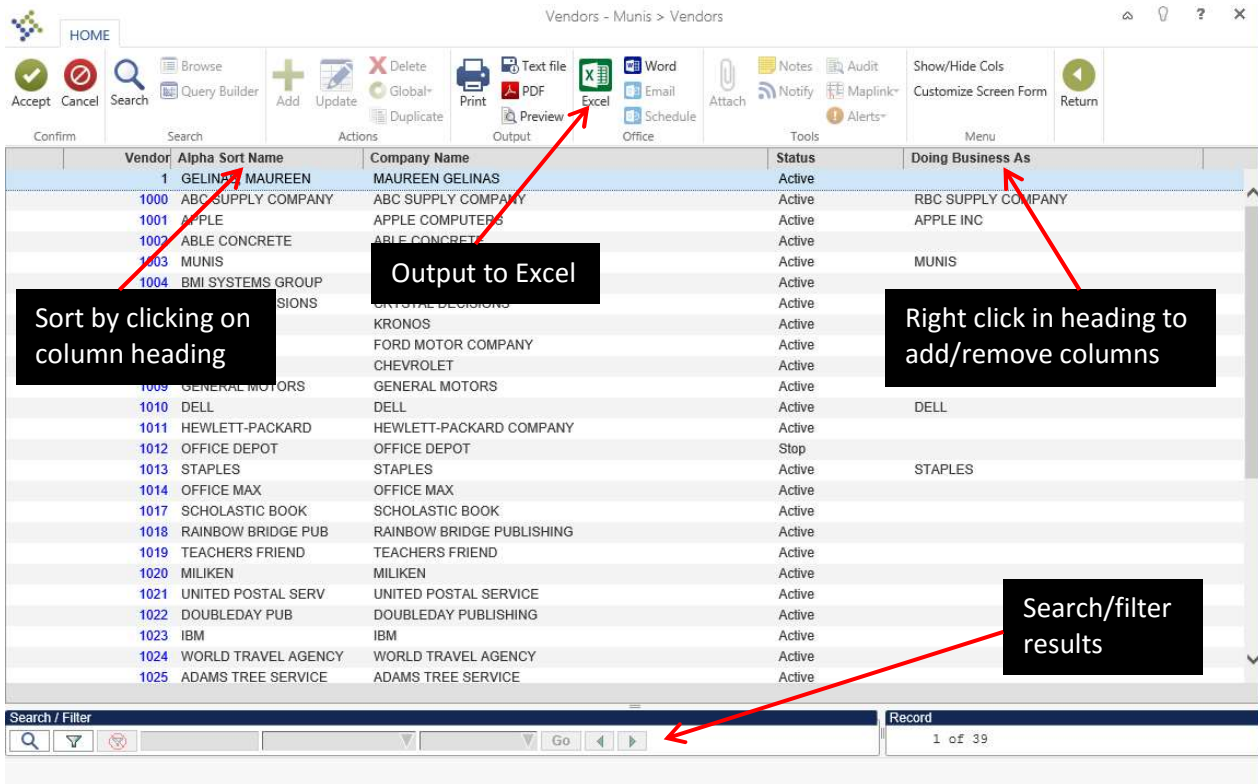
- “*” represents any number of characters and can be used at the beginning, end or middle of a string. e.g. “A*”, “A* Co.” or “*Industries”. Only valid for character fields.
- “?” represents a single character and can be used anywhere in the string. e.g. “001?075”, “370?”, “????075”. Each “?” represents 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/TIP Searching with multiple wildcards in a single field will return no results

Munis 101 – City of Tulsa

24. Click the  Browse icon to view the data in a concise format

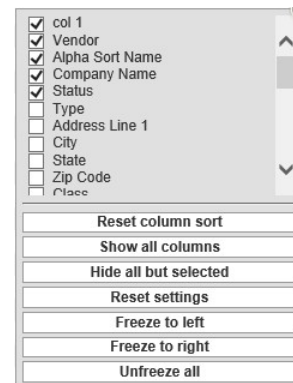
 Browse Allows a user to view records in the data set in a one line per record format. The browse screen is used to select a record, review info in summary, export data to Excel and can be customized to each user's desire.



Add/Remove/Modify Columns

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

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



customize

description

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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.



Duplicate

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

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



Output Group:



Text file

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.



PDF

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.



Preview

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



Excel

Office Group:



Word

Opens an Excel spreadsheet with the data in the current set. (Select programs)



Email

Create a mail merge with data in current set. (Select programs)



Schedule







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/TIP 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).


Munis 101 – City of Tulsa

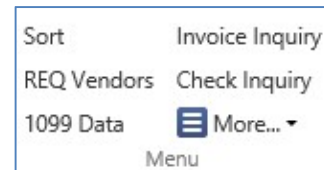
Tools Group:

-  Attach 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
-  Notes Enter notes associated with a data record
-  Notify Tyler Notify enables automated notifications through email, text, twitter
-  Audit Lists audit records associated with a data record
-  Maplink Retrieves a map associated with a data record
-  Alerts 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.

Munis 101 – City of Tulsa

-  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.
-  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 of the icon.



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 organized by tabs. The most important information appears on the first tab.