

Session 11D - MUNIS Navigation



Session Description:

Maybe you are new to MUNIS or you have used it for a few years. Want to see all the bells and whistles? Let us take you on a guided tour of MUNIS. We'll look at menu setup options and toolbars, discover action keys and spool files, and navigate through applications along the way.

MUNIS 101

Table of Contents

Login and General Overview	2
A Word About Passwords:.....	2
General Navigation	5
MUNIS Drop-down Menus and the MUNIS Toolbar:	6
Action Buttons:	8
Output options.....	14
Favorites Menu	14
Organizing Favorites.....	15
Spool File Maintenance	16
Spool File Naming Convention	18
Help Options	21
Contact Technical Support	24
Other Tips & Tricks	26
Screen Resolution:	26
Print Screen:.....	27
MUNIS Screens:	28
MUNIS Releases:.....	28

Login and General Overview

Logging into the RS6000 server allows you access to this server and identifies your user id to the MUNIS application. After entering the login and pressing Enter or clicking OK a black background window appears prompting for the password.

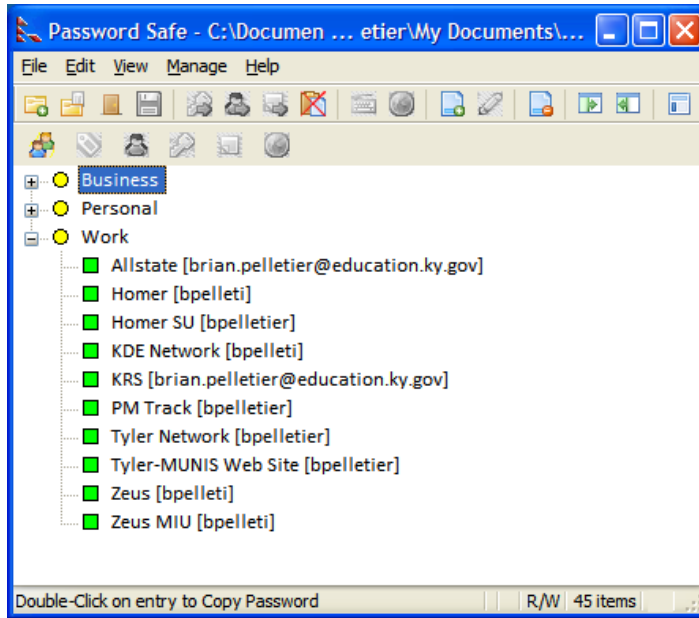


- If the window above does not appear but instead you are prompted for a password in a window similar to the small “Start an Application” window, you have incorrect client settings. This can cause a problem when your password expires. To establish the correct settings follow the link <http://www.education.ky.gov/KDE/Administrative+Resources/Technology/Financial+Management+System/User+Guides/MUNIS+and+System+Administration/MUNIS+System+Administration.htm> and select the document Installing and Troubleshooting the MUNIS Client. Follow the instructions in Manually Adjusting Client Settings starting on page 9 to resolve this issue.

A Word About Passwords:

Your password is a very important piece of information and one that should be kept secret and not easily decrypted. Using the same password or slight variations means if someone figures out one password they could likely access your accounts on other sites.

So how do you create unique passwords and at the same time remember them without writing them down or keeping them in an electronic file that could be compromised? Use a free software application! One such free application is Password Safe. This application requires you to establish and remember one password to gain access to the application which then provides access to all of your passwords. The application and password file database use a very high level of encryption to secure your passwords. Here is an example of categories and entries in the application.

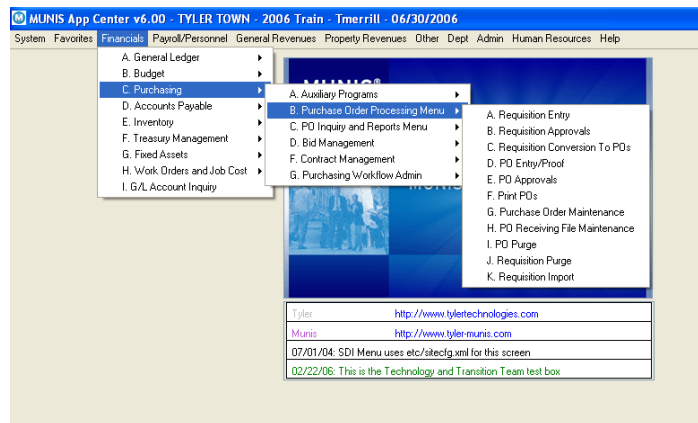


The PWSafe application provides password generate capabilities to create unique passwords with mixed case letters and numbers. It even allows you to double click on an entry to save the password to the clipboard then paste it into the password field. I have several passwords I don't know or ever have to know because I just copy and paste them into the application.

Menu Styles: MUNIS provides three different menu styles to choose from.

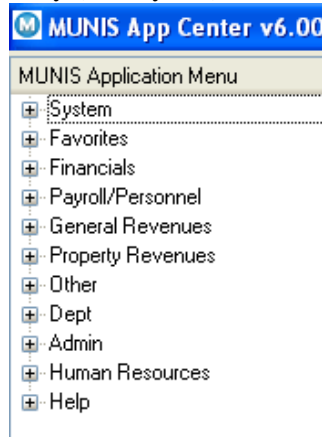
Tree is shown in the screen shot above. The menus and program names are in a column on the left side of the screen. By clicking on the plus signs or the menu names, it opens up other "branches", hence the name "Tree". The Tree menu is most popular with MUNIS users.

Pull down menu is also popular because it was an option in our 2003 release of MUNIS. The menus drop from a toolbar the top of the screen, instead of being permanently on the left column.



TIP: You can easily change your personal preferences by selecting Dept, Menu Personal Preferences.
NOTE: You will need to exit out of MUNIS completely and log back in to see your menu changes take effect.

Focusing on the left column of the MUNIS Application Main Menu, we see there are several MUNIS options available. Depending on your individual permissions, you may not see all of them. Here is a list for MUNIS Version 6 of what you may (or may not) see:



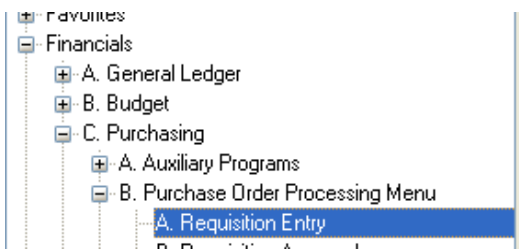
The menus are broken up first by broad category of the products that MUNIS offers. For instance, if you are looking for the Fixed Asset menus, they would first fall under “Financials”.

Notice the plus sign to the left of the names. The plus sign indicates additional menu options are available within this menu. To see the additional items, single click on the plus sign to the left of the menu name or double click the name itself. Either way will show you the menus below.

When looking at a menu screen:

- If a plus or minus sign appears to the left of the name, it is a MUNIS **Menu**.
- If no plus or minus sign appears it is a MUNIS **Program**.

The example below shows Financials, Purchasing, Purchase Order Processing Menu as all type Menus. However Requisition Entry is a Program, because there is not a plus or minus sign to the left. In order to access a program, you must double-click it.



Menu Navigation:

You can navigate menus using your keyboard:

- | | |
|--------|---|
| ↑ | Moves up one menu item |
| ↓ | Moves down one menu item |
| → or + | Expands the menu options |
| ← or - | Collapses the menu |
| Letter | moves to the next menu/program with this letter |

General Navigation

Auxiliary Menus: Depending on your permissions, you may have access to auxiliary programs. Any time you see the word, “auxiliary”, think “codes” or “setup”. MUNIS uses a variety of codes to assure data is entered correctly, and these codes initially have to be added in auxiliary menus. Also in auxiliary menus, you may need to initially setup the MUNIS parameters for the system to conform to your site’s unique processing. Each MUNIS module (product) will have its own set of auxiliary programs that you may need to access to change the settings or add/delete codes.

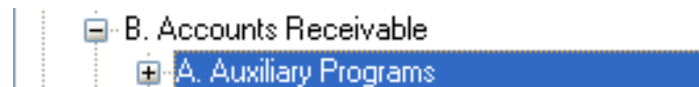
For example, there are auxiliary programs found in Purchasing:



And Accounts Payable:



And Accounts Receivable:



And many other MUNIS modules.

Inquiries & Reports Menus: There are also menus that contain nothing but **inquiry** (can’t update or enter any data) and/or common **reports** found in many different areas. For instance if you want to run reports that are based on the General Ledger chart of accounts, you can find them under Financials, General Ledger, Inquiries & Reports menu. If you want to find reports for Utility Billing, you will find them under Property Revenues, Utility Billing, Inquiries & Reports Menu.

FM Menus: There are also programs that end with “F/M” or “FM” or “File Maintenance” or “Maintenance”. These are all considered Master screens where you enter data that is more permanent, such as codes, customer records, GL accounts, physical property locations, vehicles, and other various records that you may use, add to, or update over and over.

For **General Navigation** of MUNIS, we’ll use a common program – Customer F/M. This is the central name and address program where all citizens (taxpayers, utility billing owners, etc...) are stored and maintained. It is a great program to get acquainted with MUNIS toolbar navigation.

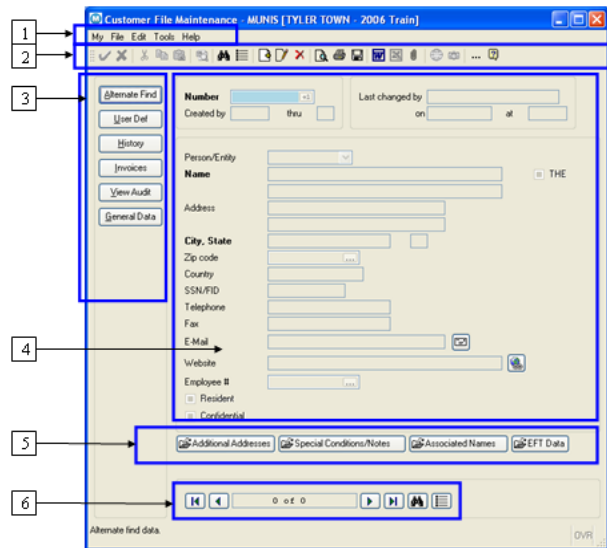
You will find Customer F/M in multiple menus since the customer file is shared among several modules and potentially users from different departments. If they don’t have access to, say, the

General Billing Billing menus...they may have access to the Accounts Receivable menus and will be able to access the Customer F/M program there.

Here is a screen print of Customer F/M found in General Revenues, Accounts Receivable, Auxiliary Programs, Customer F/M:

There are 7 areas to MUNIS program screens:

1. MUNIS Drop-down menus (defined below)
2. MUNIS Toolbar (defined below)
3. Side Bar Buttons – these buttons change according to which MUNIS program is active.
4. Work Area – this area changes according to which MUNIS program is active.
5. Embedded Screens Buttons – Not in all programs. These change as well.
6. Record Navigation Bar (defined below)
7. Tabs (not shown, but defined below)
























MUNIS Drop-down Menus and the MUNIS Toolbar:

The “My” Menu on the Drop-Down Menus allows you to perform the following 3 actions:

- Favorites – Allows you to select your existing “favorite” MUNIS programs.
- Reports – takes you to the MUNIS “Spool File Maintenance” program to view your saved reports.
- Menu Preferences – allows you to change your menu preference (Tree, Pop-Tree, Pull Down)

Under the “File”, “Edit”, and “Tools” drop down menus, you will find the exact same action buttons as on the MUNIS Toolbar. Once you enter a program, you will need to select an “action”, whether you want to find existing records, add new records, update existing records, delete existing records, etc...

Here are the Icons and their definition, along with the keyboard “shortcut” if you don’t want to use your mouse to click them:

Icon	Definition	Keyboard Shortcut	Icon	Definition	Keyboard Shortcut
	OK/Accept	Enter/Return		Display	
	Cancel	Esc		Output/Print	Ctrl-P
	Cut	Ctrl-X		Save/Spool to a File	Ctrl-S
	Copy	Ctrl-C		Export to Word	n/a
	Paste	Ctrl-V		Export to Excel	n/a
	Query Wizard	Ctrl-Q		Attachments	n/a
	Find	Ctrl-F		MapLink	n/a
	Browse	Ctrl-B		Tyler CM	n/a
	Add	Ctrl-A		Add to Favorites	n/a
	Update	Ctrl-U		MUNIS Help	F1
	Delete	Ctrl-D			

Only the icons in focus (not gray) are available. As you use different actions, the other buttons become active and available. Upon entering a new program, you may find the following options available:



Above, the first 6 icons or “action” buttons are not available because they are “grayed out”.

Help. There are 2 options under Help in the Drop-down menu:

- MUNIS Help – use this to get help on the active program or field that your cursor is in.
- About MUNIS – Some technical information helpful to the MUNIS support department.

TIP: You can right-click anywhere on the screen to get a listing of action buttons and the buttons in the left side bar!



Key and Required Fields: When you open any program in MUNIS, any Key fields are highlighted with a light blue background. Any Required fields have a bold label. In Customer F/M, you can see that the only Key field is (Customer) Number. The required fields are Number, Name, and City/State. Depending on what program you have open, there may be more or less Key and/or Required fields.


Key Fields: These fields make the record unique in MUNIS. If there is more than one key field, that means it takes a combination of those fields to make a unique record in MUNIS. You cannot change key fields once the record is created. If there is a mistake, you need to delete the incorrect record, and add it correctly. Every Key field is also a required field. These are also considered “Indexed” fields.


Required Fields: Required fields are the fields, at a minimum, needed to successfully add a record. If you try to bypass the field without filling it in, the system will prompt and require you to complete the field before the record can be saved. So, to add a new Customer into the Customer F/M program, you NEED to enter a Number, Name, and City/State to successfully add a new record.

Action Buttons:

Find: The “Find” button allows you to view existing records in the database. You can do a wide-open find, to find all records, or you can narrow your find by entering criteria to filter the data you wish to see.

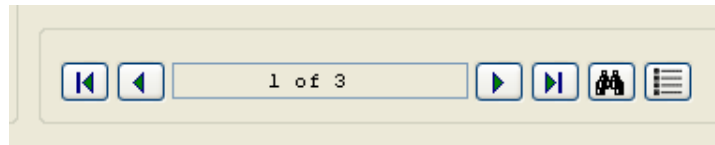
Using Customer F/M, click the find icon  then click the OK icon , to retrieve ALL records in the table. Use caution in finding all records especially in tables containing tens of thousands of records. Doing this could take several minutes or more to retrieve all the records and you may not wish to retrieve all of them anyway.

To narrow your search, click the find icon , and enter some criteria in the available fields. The available fields will be white. Use your mouse or tab key to go to specific fields. In this example, I want to find all customers who live in the state of Maine (ME). Notice in the “State” field, I put in ME.







Once you click OK  (or press Enter/Return on the keyboard), it will find the records that match the criteria you entered.

TIP: Narrowing your search by placing criteria in Key or Required fields retrieves the records more quickly.

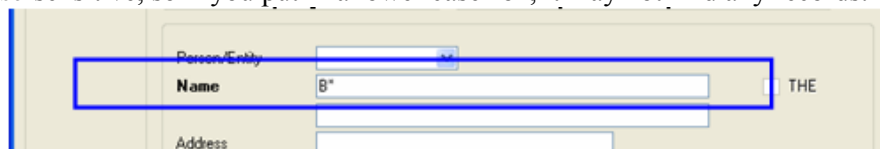
The number of records retrieved is displayed in the lower, middle of the screen in the Record Navigation area. In this example, it retrieved 3 records and is currently displaying the first of the 3 records.



Record Navigation Bar: The 6 buttons on the Record Navigation Bar are:

-  Go to the First Record Ctrl+←
-  Go to the Previous Record Ctrl+↑
-  Go to the Next Record Ctrl+↓
-  Go to the Last Record Ctrl+→
-  Find
-  Browse

Find Criteria: Use a “Wildcard” character to find data matching a portion of the find criteria. For example, to find all customers whose last name begins with the letter “B”, you would place a “B” in the name field followed by the asterisk wildcard character *. IN doing this, you are asking the system to find names that begin with “B” and may have anything else that follows the “B”. Remember that MUNIS is case-sensitive, so if you put in a lower case “b”, it may not find any records.



In this example, it found 10 records. Notice the Names all start with a “B”:

Number	Name	Address	City	State
11	BANK OF AMERICA	348 AVENUE OF AMERICAS	NEW YORK	NY
9	BANKA, KENNETH	21 BAY AVE	MUNIS	AZ
5	BEAUPRE, GEORGE L	9 PEARL AVE	MUNIS	AZ
7	BENFEY, JANE	3 TIFFANY LN	MUNIS	AZ
12	BIRON, HEIDI		FALMOUTH	NH
10	BISOL, MICHAEL	4 COVENTRY RD	FALMOUTH	MA
5	BREEN, THOMAS J	14 BEACH AVE	MUNIS	LA
9	BRKICH, AMBER	15 BAY AVE	MUNIS	MA
2	BURLINGTON PLUMBING & HEATING INC	421 WHIPPLE RD	MUNIS	VT
5	BURNS, RANDALL W	4 MEADOW AVE	MUNIS	MA

You can also put in multiple criteria, such as Names that start with B, and the State is AZ. In the above example, it would find 3 records.

To find all records that contain the word, “BANK”, put an asterisk on both ends of the word you want to find. For instance, *BANK* would find “BANK OF AMERICA” and also “1ST NATIONAL BANK”

Other symbols that you can use to find records are:

Greater Than >

Greater Than or Equal To >=

Less Than <

Less Than or Equal To <=

Not Equal To <> or !=

Range : or .. (A range from Jan 1 to Jan 31 would be 1/1/06:1/31/06)

Or | (this is called the pipe symbol, located above the Enter key. For example, if you want to find either ME or MA, use ME|MA)


The Greater Than and Less Than symbols are great for use in date fields when you are trying to find records before or after a certain date. For example, if you want to find all records that have been added to Customer F/M on or since January 1st, 2005, you would find on the date field for Greater Than or Equal To 1/1/2005. That would look like this:





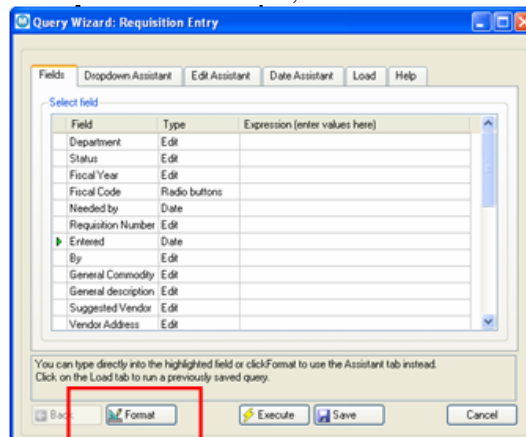
The screenshot shows a search interface with two main input areas. The left area is labeled 'Number' and contains a text box with a '+' icon and a 'Created by' field with a 'thru' field. The right area is labeled 'Last changed by' and contains a text box with a date field set to '1/1/2005' and an 'at' field. A blue box highlights the date field and the 'at' field.

Query Wizard (Advanced Find): This optional tool guides a user in defining search criteria to find selected records. This tool is very useful for combining multiple search criteria on Dropdown fields in MUNIS or when you need help in formatting complex search criteria.

For example, to find all requisitions entered on 7/4/2005 and 7/5/2005 (two days), open Requisition Entry.

Using the typical Find tool, I would do this by clicking the Find icon , go to the “Entered” field, then put in the 2 dates, separated by a pipe symbol, like this 7/4/2005|7/5/2005.

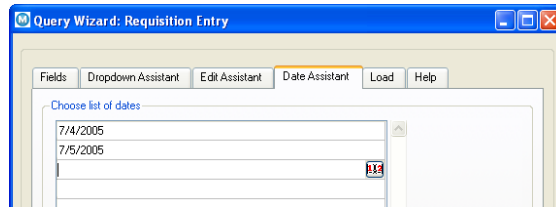
To do this using the Query Wizard, after clicking Find , click the Query Wizard icon  (It will only become available after you click the Find icon). Put your cursor beside the “Entered” field, in the Expression column. Once your cursor is in that field, click the Format Button:



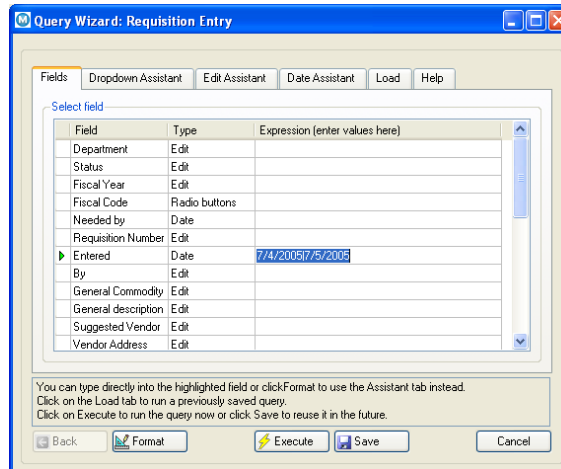
The screenshot shows the 'Query Wizard: Requisition Entry' dialog box. It has tabs for 'Fields', 'Dropdown Assistant', 'Edit Assistant', 'Date Assistant', 'Load', and 'Help'. The 'Fields' tab is active, showing a table with columns 'Field', 'Type', and 'Expression (enter values here)'. The 'Entered' field is selected. At the bottom, the 'Format' button is highlighted with a red box.

Field	Type	Expression (enter values here)
Department	Edit	
Status	Edit	
Fiscal Year	Edit	
Fiscal Code	Radio buttons	
Needed by	Date	
Requisition Number	Edit	
Entered	Date	
By	Edit	
General Commodity	Edit	
General description	Edit	
Suggested Vendor	Edit	
Vendor Address	Edit	

Depending on what type of field (Dropdown, Edit, or Date), your cursor takes you to the corresponding tab (Dropdown Assistant Tab, Edit Assistant Tab, or Date Assistant Tab). By choosing a **Date** field (“Entered”), it takes me to the **Date** Assistant Tab. To put the 2 dates in a list, I would enter the 2 dates on 2 lines, like this:

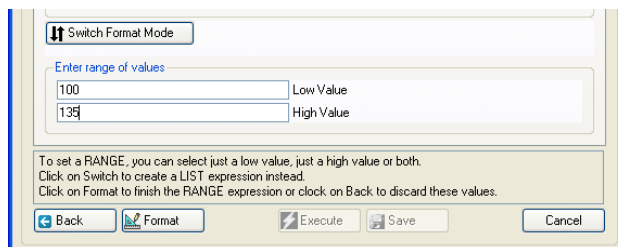


Then, click the Back button. It shows how the correct formatting would look for that field:



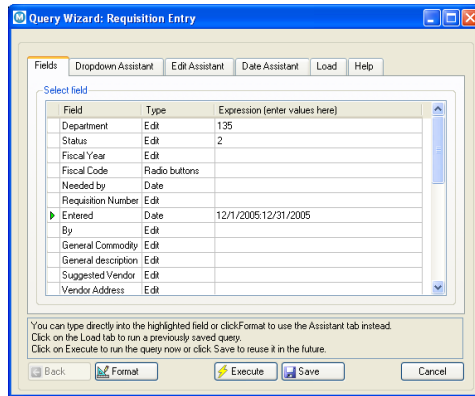
The Query Wizard essentially reproduces the same search as putting in the 2 dates, separated with a pipe symbol.

If I wanted to put in a range of criteria (from a certain starting point to a certain ending point), I could have clicked the “Switch Format Mode” button which would take the cursor to the bottom part of the screen, where I can put in a “range”. In this example, I am trying to find the department codes from 100 to 135 and anything in between. NOTE: Not all fields allow a range entry in Query Wizard, so the “Switch Format Mode” button may not be available.

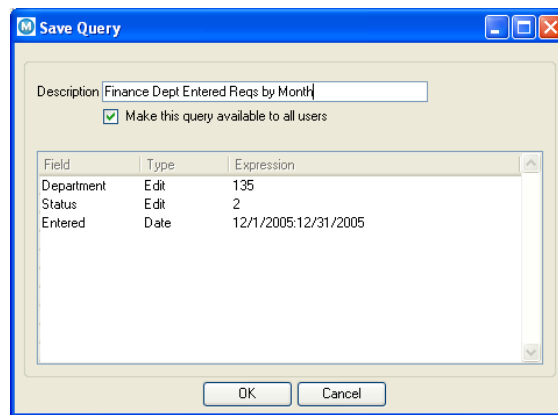


A powerful feature of the Query Wizard is the ability to **Save the Query** for later use. This is especially beneficial for occasionally used complex queries or for use by novice users.

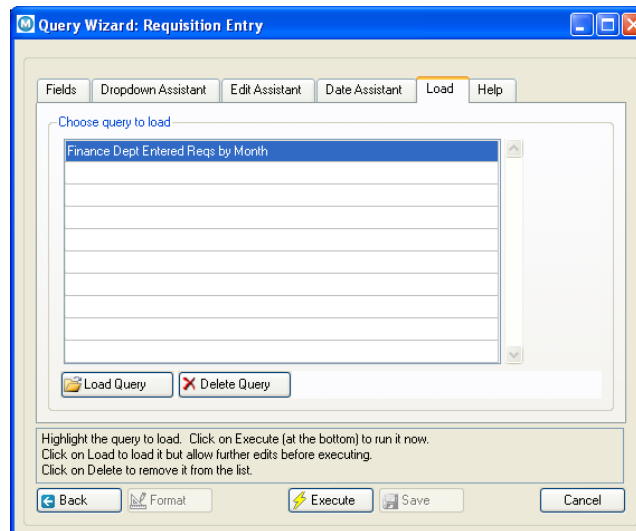
For example, I want to find all requisitions that are still status 2 (Created), for the Finance Department (code 135), and were entered in December, 2005 (from Dec 1 to Dec 31). If I save the Query, I would only need to change the dates to run it once a month. Enter the search criteria using the Query Wizard, and then click the Save Button:




Give the Query a meaningful name so you will remember what it does, then click OK:

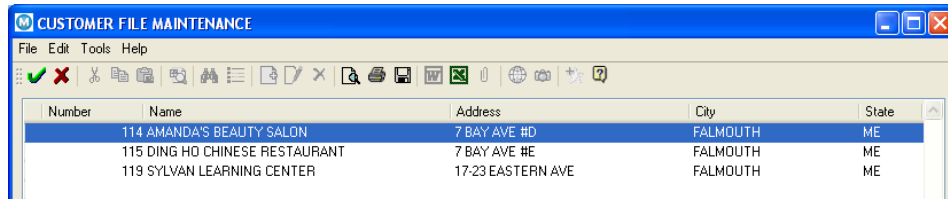



To run the query again, go into **Query Wizard** and select the “Load” tab. You will see your saved Queries there. You can either Execute the query, or click the “Load Query” button if you wish to make changes to the query (like changing the dates each month) before running it.




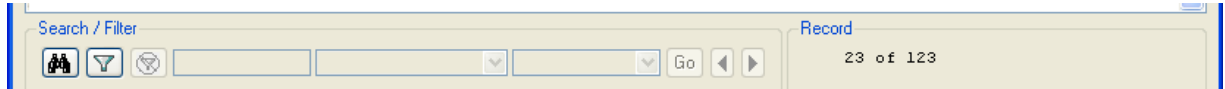
Browse: After finding records, you can click the Browse icon  to show the records in a list. You can sort the list in either ascending or descending order on any column that displays. Right-clicking


anywhere in the column heading allows you to add or delete columns. If you have made any changes, click OK and MUNIS will remember your preferences for these columns next time you browse data in this program.





- The total number of records displays in the lower right of the screen including your current record.
- To navigate through the records, use your arrow keys on your keyboard, or just click with your mouse. The record you are on will be highlighted in blue.
- Use the scroll bar on the right to view records that extend beyond the end of the screen.
- To select a record, double-click with your mouse, or while on the record you want, either press the OK button  or hit Enter/Return on the keyboard.


You can go to individual records that are in your Browse screen list, by pressing the find button  in the lower left corner. Your cursor highlights the record you want to find.




While in the Browse screen you can further “filter” your data. Click the Filter button in the lower left corner of the screen  and enter more filter criteria without returning to the main screen to find the records again.

Another great feature of this browse screen is the ability to export all selected records to Microsoft Excel by clicking the Excel Icon . You must have Microsoft Excel on your PC in order to use this feature.





 **Add (Ctrl-A):** Use this icon to add a new record into the program. Remember to enter information into the Key and the Required fields at a minimum. Use the tab key and the shift-tab key to navigate from field to field. Don’t use your mouse!

 **Update (Ctrl-U):** Use this icon to change an existing record. Use the tab key and the shift-tab key to navigate from field to field.

 **Delete (Ctrl-D):** The system prompts you verifying your desire to delete the record. This option only deletes one record at a time – it won’t delete all the records in your “find set”.

Output options

Output is a general term for viewing, printing, or saving the records you want to see. It could be a list of records, or it could be a report.


- Print to the screen (Display)  as Plain Text. Useful before printing.
- Print to the screen (Display)  as a PDF (Adobe Acrobat) Presentation Quality Report! You have all the functionality of any Adobe PDF document (save, email, print, page, etc...) From here, you can print it to any network print (including your local printer).
- Print to your default printer . Your default printer is defined in the System Parameters. The printout will look like the plain text display.
- Save/Spool your list or report . This will save the list/report as a file to view or print later.
- Or click File / Output to select other printers or to see all the above and more output options.

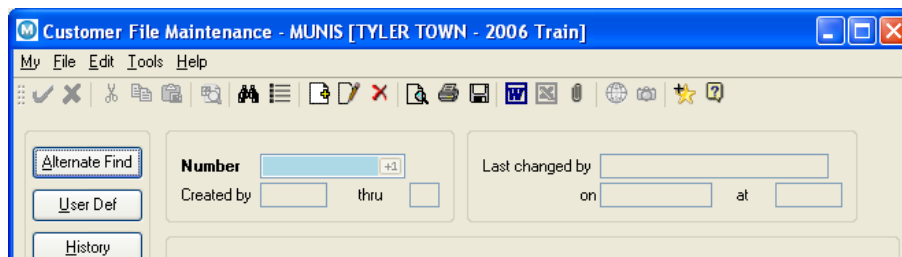
Tip: When choosing the File / Output option, you are able to select different printers – both network (shared) printers and your local printer connected to your PC! This behaves similar to Microsoft Office products where the printer icon is your default only, but if you select File / Print, you can select a different printer.

Favorites Menu

Favorites are programs that you use frequently and want to have easy access to them. Rather than find them in the MUNIS menus every time you want to use them, you can store them for quick-access in the “Favorites” menu.

To use favorites you must first add one or more programs as a favorite.

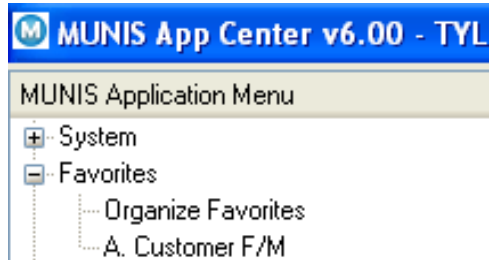
To add a favorite open any program and click the Add to Favorites icon . It is located on the MUNIS toolbar. Here is the Customer F/M example:



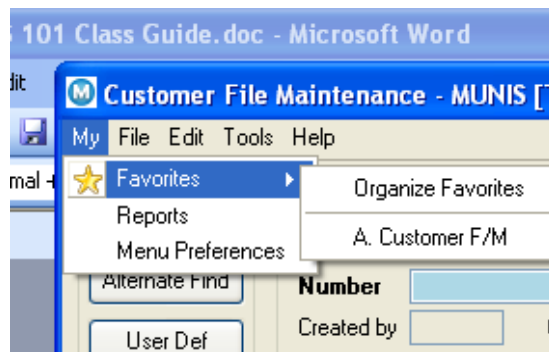
NOTE: You must restart MUNIS to see the programs added to your favorites menu.

After adding favorites, there are 2 ways to access them in MUNIS:

- You can access them via the Menu Tree under “Favorites”



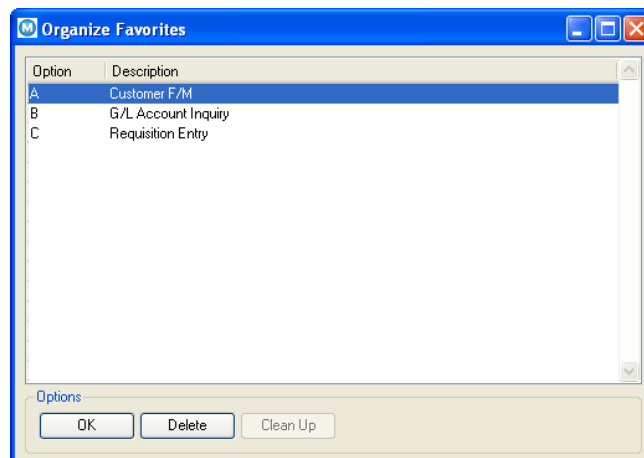
- Or, you can use the “My” Menu on any program.



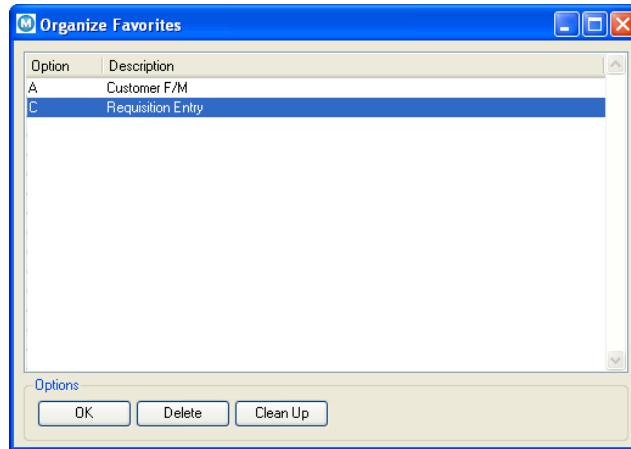
Organizing Favorites

Clicking on the “Organize Favorites” option allows you to delete the favorite (it will not delete the MUNIS program entirely, it will just remove it from your favorites menu). For example, lets say you have 3 items in your favorites, and you want to move the one in the middle of your list, because you don’t use that program very often.

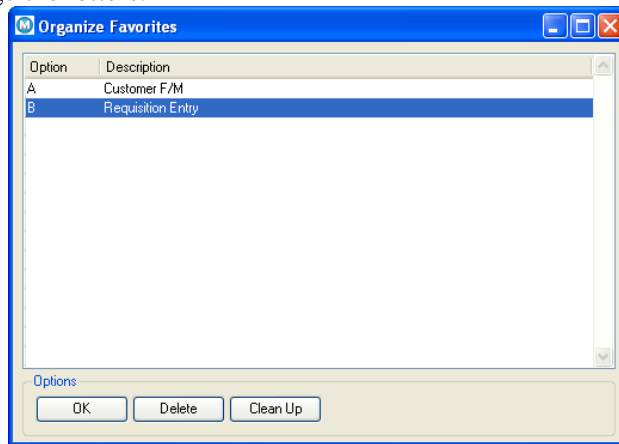
Double Click “Organize Favorites”. It brings up the following screen:



Highlight the program you want to delete by single clicking it. Press the “Delete” Button.




Now click the “Clean Up” button. This will reorganize the A, B, C order in your favorites menu. It will automatically change the letters.



When done, click OK or click the Red “X” in the upper right corner. You will see the changes instantly.

Spool File Maintenance

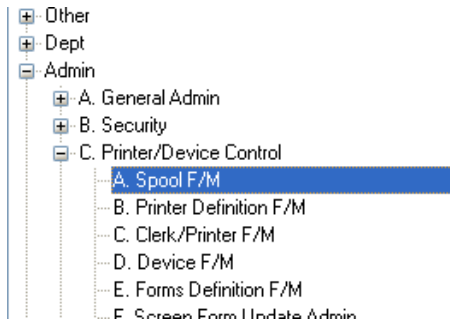
The last form of output is to Spool the output/report. Spooling a report saves it as a file on your server. Once “spooled”, you can view or print the report at any time, and as many times as you need.

After defining your report or selecting output records, click the Spool Icon . The bottom of the screen alerts you that a spool file has been created and provides the spool file name as well as how many pages the file/report is. The name is system-generated but change be changed.

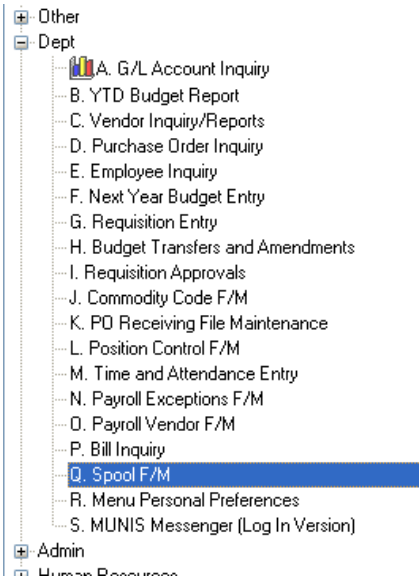
The \$pool file 'arcstmnt.003' has been created -- 1 page(s).

Viewing and/or printing spool files: The spool file maintenance program allows you to view or print spooled files. This program can be opened 3 ways:

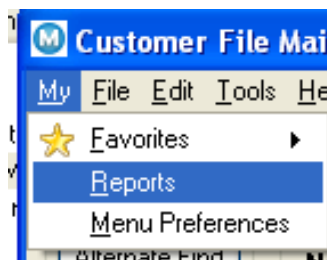
- From the menu: Admin, Printer/Device Control, Spool FM




- From the menu: Dept menu. This could be saved as a Favorite to make it easier!



- From the “My” menu option from any open MUNIS program. Choose Reports. NOTE: This option only allows you to view/print your own spool files.



If you access Spool F/M via “My” Menu, a listing of your spooled files is presented. If you access Spool F/M via the Admin or Dept menu, you must find the spool file(s) before you can view or print

them. To do this, press the Find Button .

Depending on permissions, you may only be able to find/view your spool files. This is a benefit as it presents only your files and not all files generated by everyone using MUNIS. Only full permissions allows access to the “User ID” column. If you don’t have permissions to view other users’ spool files, you won’t be able to access the “User ID” field when in Find mode.

Spool File Naming Convention

MUNIS uses 2 file naming conventions depending upon the version of MUNIS used to create the report.

MUNIS V6 & prior

poinquery.001

glytdbud.259

prempmst.049

MUNIS V7 & later

poinquery0001.txt

glytdbud0259.txt

prempmst0049.txt


In both versions the first 8 characters of the filename typically mimics the name of the program that generated the file. In V6 and prior the name is followed by a period then a 3 digit sequence number for the report. In V7 and later, a 4 digit sequence number follows the name and the report has a “.txt” extension. The new version allows up to 10,000 unique copies of a report from the same program. The new version also easily allows the report to be opened with Notepad or other applications that recognize the “.txt” extension.

The list is returned alphabetically by the User ID, then the Spool Name. However, you can sort the columns. In this example, I sorted by the Date column:


NOTE: You can also highlight a file and double-click or press <ENTER> to preview.

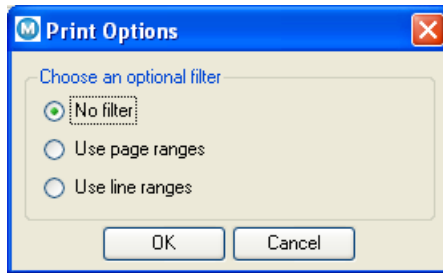
User ID	Spool Name	Report Title	Date	Time	Pages
jfaunce	ubproof.001	U/B CHARGE PROOF/REGISTER	06/14/2006	15:17	5
jfaunce	ubnewbil.001	BILL PRINT/STATEMENT	06/14/2006	15:21	8
jfaunce	ubgenrar.001	GENERATE A/R JOURNAL ENTRIES	06/14/2006	15:19	2
jfaunce	arcshrcr.001	PAYMENTS PROOF	06/15/2006	11:01	3
jfaunce	arcshrcr.003	PAYMENTS PROOF	06/15/2006	11:08	3
jfaunce	arcshrcr.002	PAYMENTS PROOF	06/15/2006	11:06	3
jfaunce	prempimp.001	EMPLOYEE IMPORT	06/22/2006	14:51	2
jfaunce	ubchgmt.001	CHARGE ERROR LIST	06/22/2006	13:59	1
munis	prempimp.004	EMPLOYEE IMPORT	06/22/2006	15:13	2

After selecting a list of spool files you have several options:

Display the report: Just double click anywhere on the line. Or, Click the Display Icon  after highlighting the report you wish to see. You are prompted to display as plain text or as a PDF, just like anywhere else in MUNIS. You now have the exact same capabilities as the reports to page through the report. You can also click the button, “Display Files” on the left column:

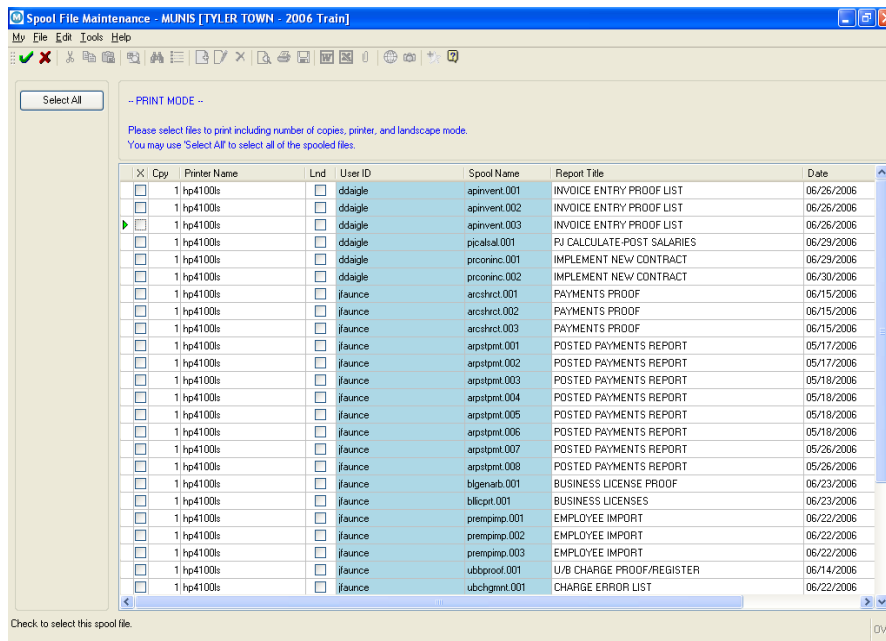
The Display Files option, allows you to elect to display only a few pages of the report, or even just a few lines of the report (see next option for a more detailed description).

Print the report: Highlight the report you wish to print by single-clicking on it. Then, press either the printer icon  to print the entire report to your default printer, or select Print Files button from the left column. If you select this option, you will get the following pop-up:

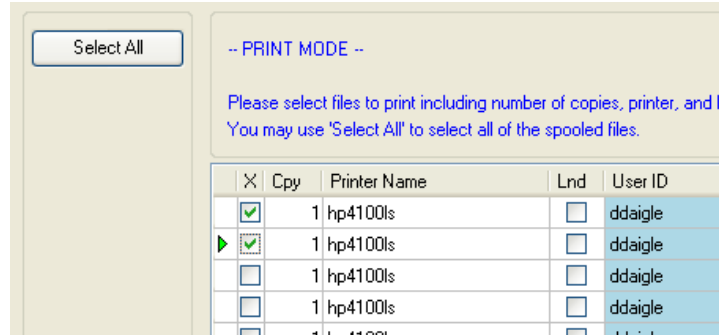


- **No filter** means you would like to print the entire report (all the pages).
- **Use page ranges** means you would only like to print some of the pages (the first few, some pages in the middle, or the last few).
- **Use line ranges** means you would like to print only certain lines within the report.

No filter: If choosing No filter, when you click OK, you get the following screen:

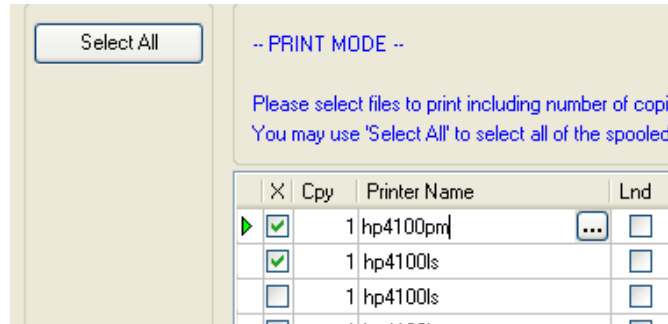


This screen allows you to select multiple spool files (reports) to print. Notice the “Select All” button in the left column. Whatever spool files you would like to print will need to be checked off in the left column under the “X”. For example, if I would like to print the first 2 spool files in the list, I would check off only those 2:




Also, you can select the number of copies of the spool file you would like to print by changing the default, 1, to any other number under the “Cpy” column.

Then, select a Printer from the list (hp4100ls in this example). You can change it by clicking in the printer column for the record you want to change, then selecting a different printer from a list. This gives you the option of printing multiple reports to different printers at the same time!



Finally, there is an option to print in Landscape mode (the Lnd) field. This option is only used with older printers that don’t recognize the print commands and should be left unchecked.

After selecting report(s) to print, and designating a printer, click OK .

Use page ranges: You will get the same options as above, plus access to 2 other fields: Start and End. Notice on the 2nd line down, I have put in a start page of 4 and end page of 4. That means, it will only print the last page for the 4-page report.

X	Cpy	Printer Name	Start	End	User ID	Spool Name	Report Title	Date	Time	Pages
<input checked="" type="checkbox"/>	1	hp4100pm		1	ddaigle	spinvent.001	INVOICE ENTRY PROOF LIST	06/26/2006	08:50	1
<input checked="" type="checkbox"/>	1	hp4100ls		4	ddaigle	spinvent.002	INVOICE ENTRY PROOF LIST	06/26/2006	15:52	4
<input type="checkbox"/>	1	hp4100ls		1	ddaigle	spinvent.003	INVOICE ENTRY PROOF LIST	06/26/2006	16:01	4
<input type="checkbox"/>	1	hp4100ls		0	ddaigle	spinvent.004	INVOICE ENTRY PROOF LIST	06/26/2006	11:22	0

Use line ranges: Although rarely used, this function allows you to print only a selection of lines from a report. There is a Start and End, just like the pages, however you would put in only the lines you want to see.

Display PDF Files (or Text as PDF in V7.X): Selecting this option allows you to view any spooled report using the Adobe PDF Reader. This provides a presentation quality view of the report and also provides the capability of:

- Saving the file to your local workstation or windows server

- Emailing the report to one or a group of individuals

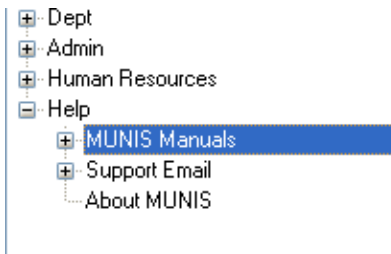
Help Options

MUNIS Help is context-sensitive, meaning it provides help based upon where you are in the MUNIS application. There are several ways to access the context-sensitive help from within MUNIS.

- Product-Level Help (Context-sensitive help is available for all MUNIS modules)*
- Screen-Level Help*
- Field-Level Help*
- New Help Format
- On Screen Field Help (ToolTip or Status Bar)
- Contact Technical Support

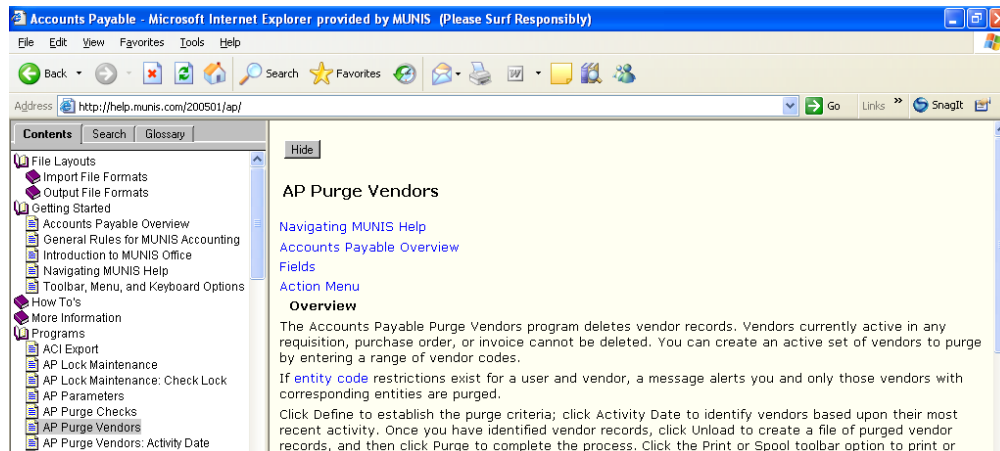
*A high-speed internet connection is best for these help options.

Product-Level Help (Context-sensitive): Updated help is included with every new MUNIS release. Help is accessible by clicking the **Help** menu and then **MUNIS Manuals** from the main MUNIS menu:



This type of help is available for every MUNIS module. Upon clicking the module name, you are directed to a Web site. The Release Notes on this site show all the latest features in your release.

Here's a sampling from the Accounts Payable help, and the Purge Vendors Program:



Video based tutorials are also available starting with MUNIS Version 7.3. They provide valuable guidance on using. They are available in MUNIS Version 7.3. Here is a sample

Payment Entry - MUNIS [MUNIS]

My File Edit Tools Help

Entry Date 06/02/2008

Clerk michelle.wainer

Receipt Option 0 - NO RECEIPTS

Department T161 161 TOWN CLERK

Batch Number 2762


> Entry Date - This box indicates the date the batch is created. The current date is the default date, but you can change it to a future date.

> Clerk - This box indicates the user name of the clerk who created the batch. You cannot update this field.

> Receipt Option - This list indicates the option to use to print receipts. The default value of 0 -NO RECEIPTS directs the program to not print receipts. Other options on the list allow you to print individual receipts for each transaction; to only print a summary of receipts processed; to print both individual receipts and a summary; or to print an individual receipt if you only process one payment for one customer or to print a summary receipt if you process several payments for one customer.

> Department - This box indicates the department code for the clerk. Department codes are established in the System Department Code Maintenance program.

3 of 12

Screen-Level Help: Open any MUNIS program and click the Help Icon  on the MUNIS toolbar to see the help available on the Web site for the current program. This is the same help information as described above. The advantage is you do not need to find the topic in the help content first – you are taken directly to the help for that program, without having to navigate through to locate it. Here’s a sample of the help for Customer File Maintenance:

Customer File Maintenance - Microsoft Internet Explorer provided by KY Dept. of Education

http://help.munis.com/v73/ar/Content/Programs/arcstmm01.htm

File Edit View Favorites Tools Help

Customer File Maintenance

Contents and Navigation

Customer File Maintenance

The Customer File Maintenance program allows you to view and maintain data for all of your customers. You must be an [authorized user](#) to add, update, or delete customer records.

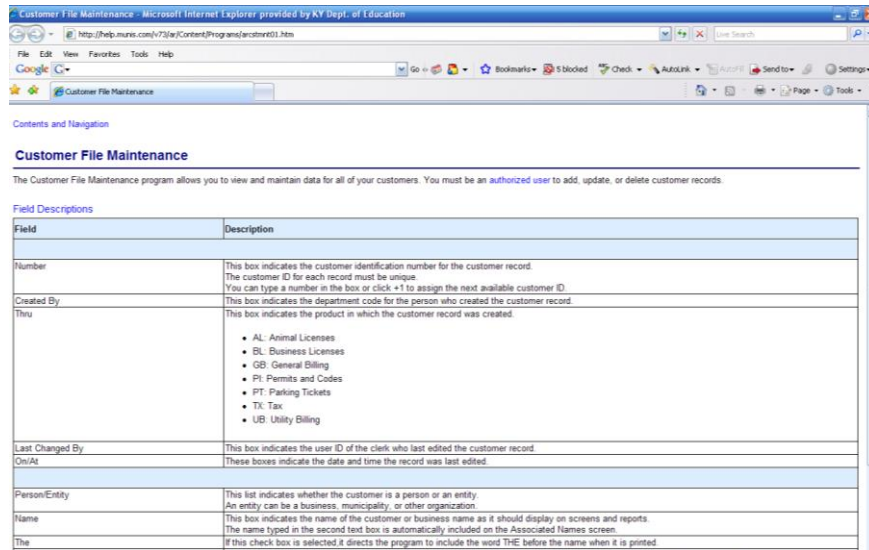
Field Descriptions

Tasks

General Resources

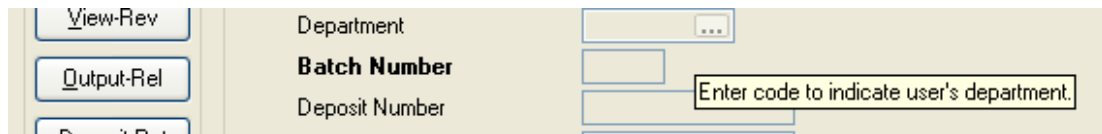
- General MUNIS FAQs
- Getting to Know MUNIS
- MUNIS KnowledgeBase
- Navigating MUNIS Help
- Toolbar, Menu, and Keyboard Options
- MUNIS Technical Support

Within the Screen Level Help select the Field Descriptions link to gain access to detailed description of each field:



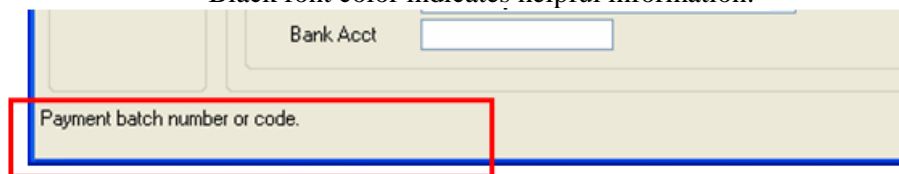
On Screen Field Help: This help has been around for a while, but it is very important to know that it is there. There are 2 types of On-Screen Field Help:

- “ToolTip” Help. Just hover your cursor over any button or field, and the help will display.

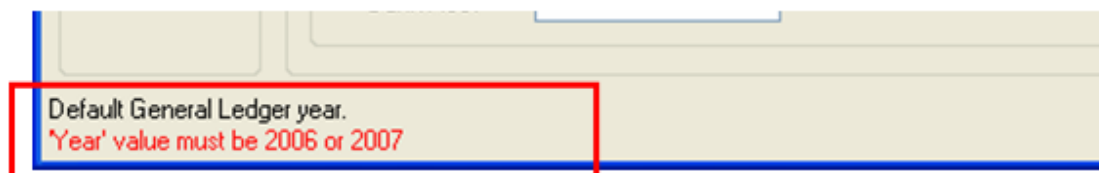


- “Status Bar” Help. Whatever control is active, whether it be a button that is highlighted or a field that your cursor is in (during add or update), there is help info that displays in the **lower left** portion of the MUNIS screen.

Black font color indicates helpful information:



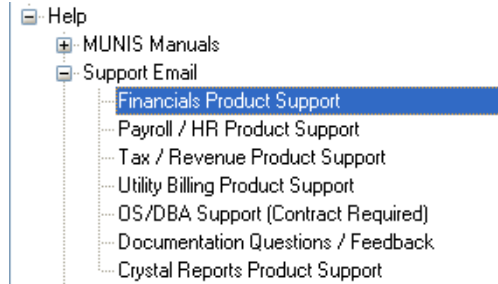
Red font color indicates there is an error or warning for the action you are performing:



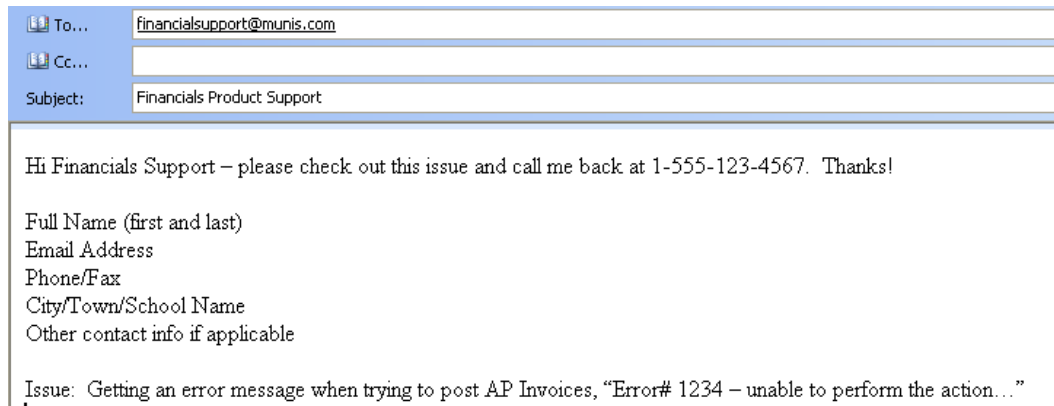
Contact Technical Support

The last (but certainly not the least) form of Help is to contact the MUNIS Technical Support Department. This can be done 3 ways:

- **Email:** From the MUNIS Main Menu, click **Help, Support Email**, and then double-click the Technical Support Department you wish to send an email to.



This opens your email program and places the MUNIS support department email address in the “To” field and a default Subject in the Subject line. Include as much information as possible, including your contact info, the program giving you the problem or question, and any error messages that appear on your screen.



NOTE: Do NOT submit any Critical/Priority 0 or 1 issues via email to MUNIS Technical Support. Although email is monitored, any priority 0 or 1 issues need to be called into MUNIS Technical Support directly.

Phone: 1-800-772-2260, 3. Then, listen for your specific module with the issue:

- | | |
|---------------------|--|
| 1 - Financials | 5 - OSDBA (Hardware Issues for OSDBA Customers) |
| 2 - Payroll/HR | 6 - ASP (Data and Hardware Issues for ASP Customers) |
| 3 – Tax | 7 - Crystal Reports |
| 4 - Utility Billing | 8 - Tyler Education Management |
| | 9 - Tyler Form Processing |

If you leave a message, please provide your full name, your city/town/school district, a return phone number, and a brief description of your issue, including the module and/or program.

- Web site:** This is the easiest and fastest way to report a **non-emergency** issue to MUNIS Technical Support. Go to: <http://support.munis.com>. Click “Support” then click “Tyler Client Portal” in the left column. **NOTE:** To use Customer Tools, you must first be logged in as a registered user



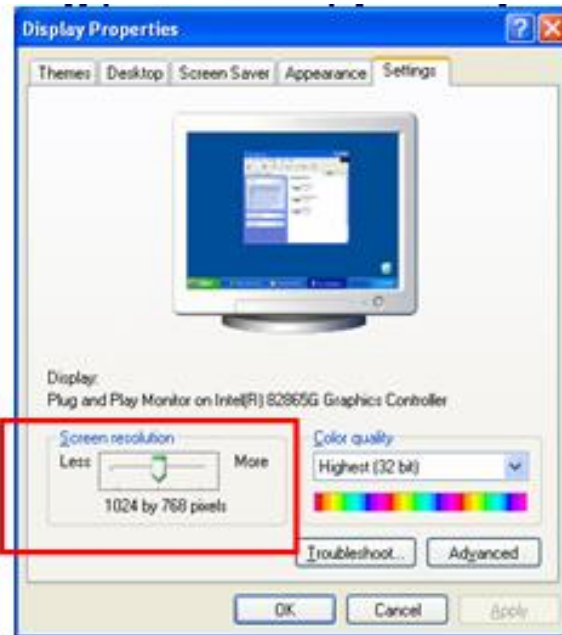
Other Tips & Tricks

Screen Resolution:

MUNIS runs optimally in 1024 x 768 resolution. To check or change your screen resolution, right click anywhere on the background of your desktop and click ‘properties’:



The Display Properties Box appears. Click on the “Settings” tab, and change your Screen Resolution to 1024 x 768 pixels. Then click Apply and OK. You may get a warning, click OK:

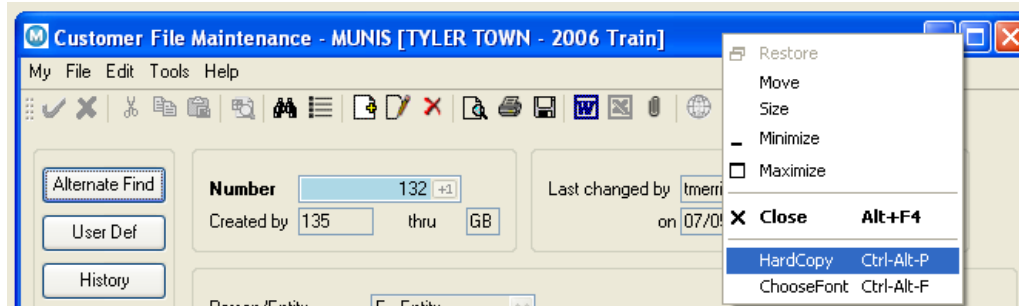


Note: This will change the resolution (size) of all your programs – not just MUNIS. After making the change, run your other programs to see if they are satisfactory. You may just want to give it some time to adjust to the new settings. You can always change it back if you choose.

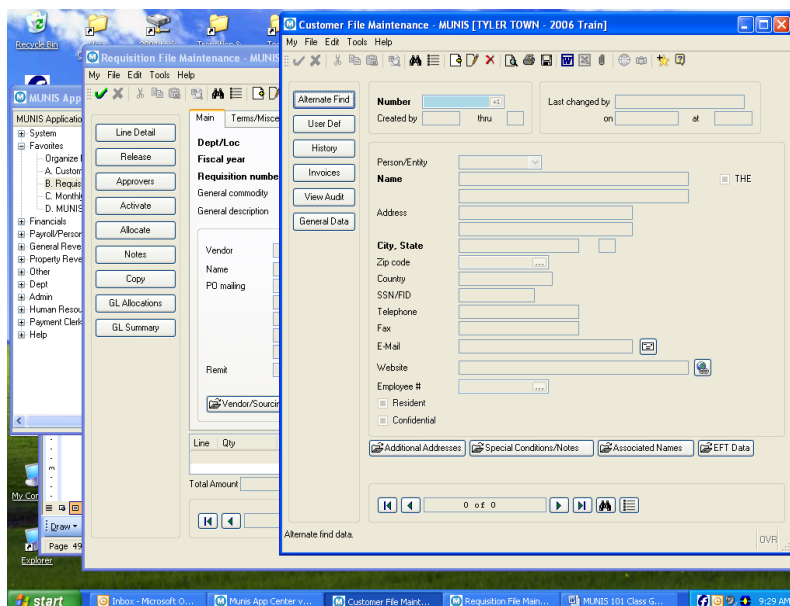
Print Screen:

There are 2 ways to do a Print Screen in MUNIS.

1. Print a Hard Copy: On the blue bar at the top of the MUNIS Program screen, right click. Select “Hard Copy”. Your local printer dialog box will appear to select a printer. This prints an exact copy of the active MUNIS window/program.

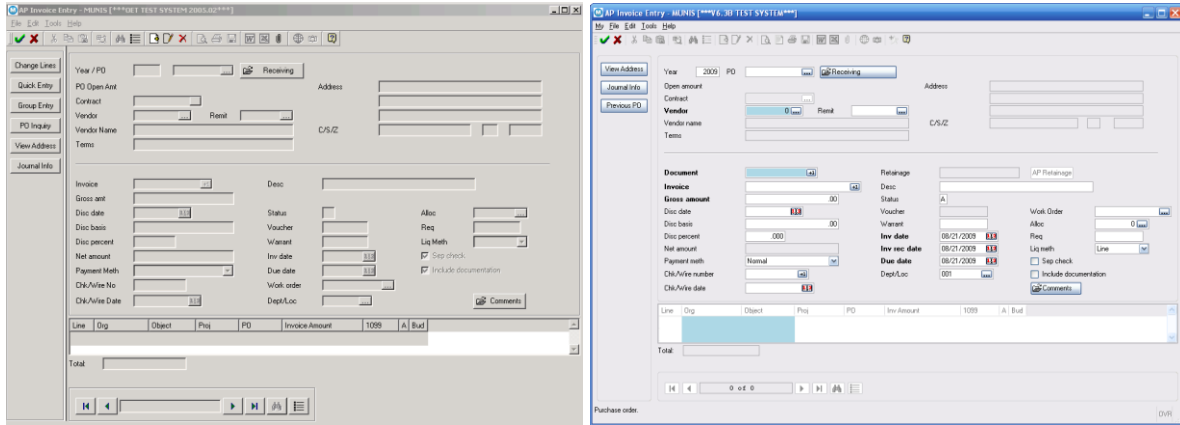


2. Copy and Paste: There are 2 ways to copy and print screen using this method.
 - a) To **capture only the Active MUNIS Program** (the active program is the window with the dark blue bar at the top) press Alt-Print Screen on your keyboard. This will copy the image of the active program to the clipboard. Now you can open Word or any other word processing document (even other programs like Excel or Powerpoint), and paste the image into the document. You now have all the functionality in Word to crop and/or size the image. This is very helpful in creating documentation for your staff. Another great feature is that you can paste the image into emails! This function works with all Windows-based programs.
 - b) To **capture everything you see on your monitor**, press the Print Screen button on your keyboard. This will copy the image of your entire desktop – active programs, inactive programs, your background, your task bar at the bottom of your screen, etc... You would then paste the image into Word or other Word Processing Document. Here's a sample:



MUNIS Screens:

The appearance of a MUNIS program screen will vary based upon your Windows Desktop settings. The settings may be manipulated individually or you may load a Windows theme to define a set of appearance parameters for your window panes. Take a look at the same program displayed using different themes/settings:



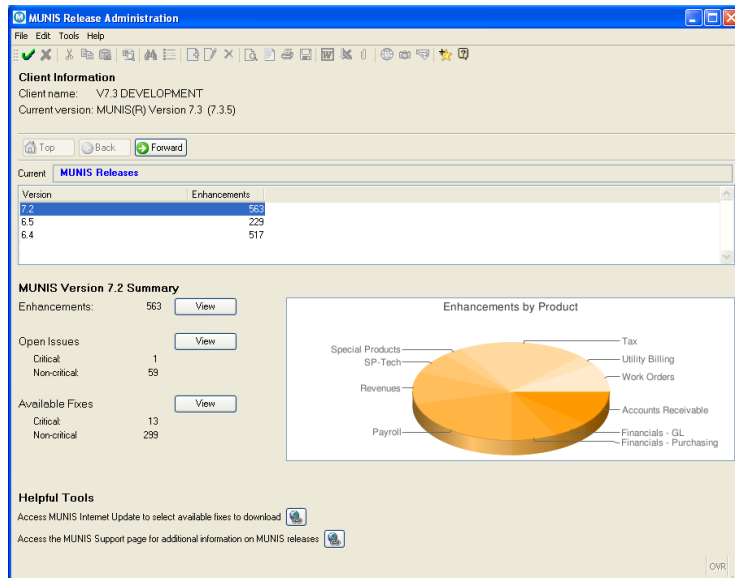
It's hard to believe this is the same exact program viewed using two different Windows themes. If your screen looks like the one on the left you can brighten it up by changing your theme. The screen on the right uses the Windows Royale theme. Start by downloading this theme from a Microsoft web site. Once saved you can open your Windows properties and change the theme.

Right click anywhere on the background of your desktop and click 'properties'. The Display Properties Box appears. Click on the drop down box under "Theme:" and select "Browse...". Locate the Royale theme you saved and open it. Then click Apply and OK.

MUNIS Releases:

MUNIS periodically releases new versions including major releases (e.g. 7.0, 8.0 etc.) and minor releases (e.g. 7.2, 7.3, 7.4 etc.). Between releases MUNIS enhances programs as well as corrects reported program bugs and makes the programs and associated information available to customers through the MUNIS Release Administration and MUNIS Internet Update programs.

The MUNIS Release Administration program is found in the Admin -> Admin Inquiry menu. This program provides information regarding enhancements, open issues, and available fixes for various MUNIS releases/modules.



You may drill down into a release or functional area to obtain more detailed information regarding an enhancement or release:

