

#### **Contents**

Using The Tyler Hub Munis Page	3
Favorites	6
The Favorites group on the Munis Landing Page provides easy access to the Munis programs the frequently. Using the Edit Favorites option on the Tyler Hub page, you can manually add progralist, or you can create new categories and add favorite programs to that group	ams to this
Add a MUNIS Menu Program to My Favorites	6
Add a Website to My Programs	7
Standard Screen Features	8
Closing a program and returning to Tyler Hub	10
Minimizing the Ribbon	10
Explanation of Munis icons	11
Table Headings	15
Finding Records in Munis	16
Using Wildcard Card Characters in Searches	16
Using Query (Advanced Find)	19
Managing Selected Records	22
Browsing Records	23
Exporting Records	24
Filtering Records	24
Kayboard Shortcuts	25

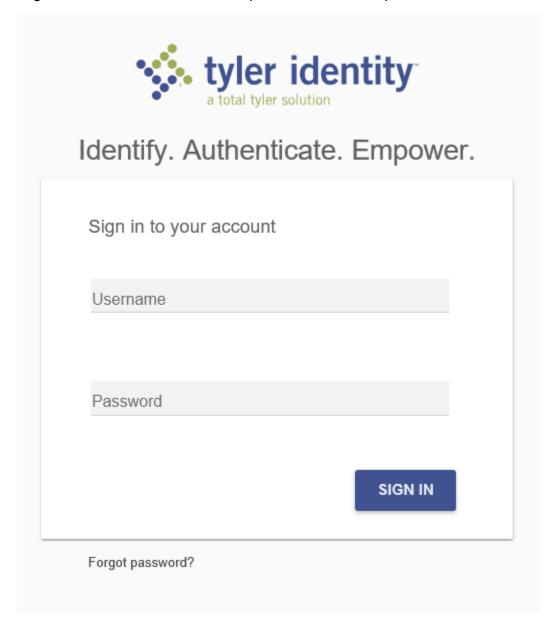
#### **Using The Tyler Hub Munis Page**

To open Munis, open Google Chrome and type the following website address:

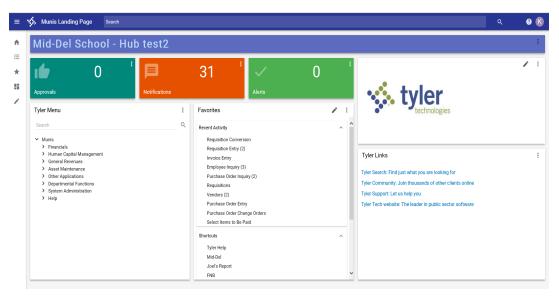
#### https://tylerhub.mid-del.net

The log in page for Tyler Identity should appear. If not, contact Kellie Duckworth (ext. 1277) or Tresa Cantrell (ext. 1278).

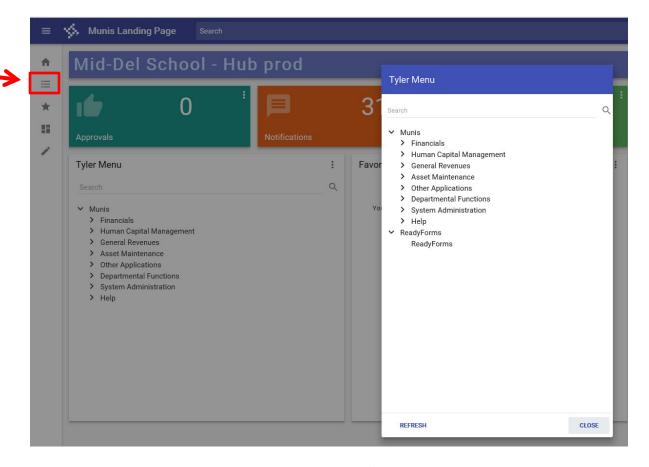
Log in is the same as the initial computer username and password.



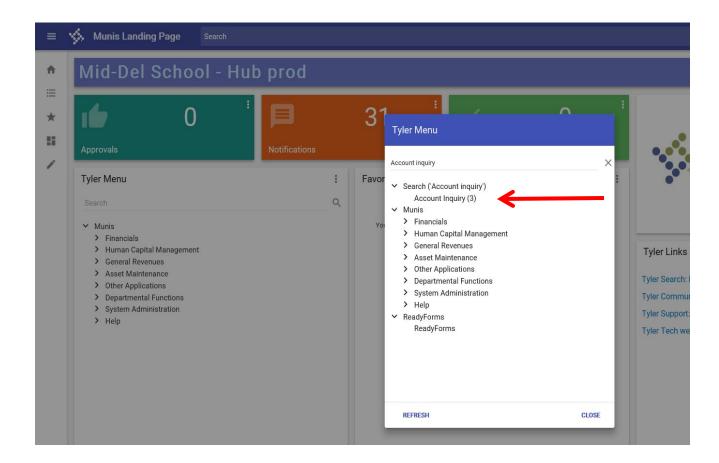
The Munis Hub Page has a new look. Below is a sample.



To Display the Munis menu, click on the Tyler Menu in left toolbar.



Using the Search box on the Tyler Menu, you can search for Munis programs by name. When you complete a search, results for multiple instances of the same program are summarized. For example, if there are three instances of an identical Account Inquiry program on your Munis menu, the search results display Account Inquiry (3). For programs with identical names that are not identical programs, the search results display the name for each program.



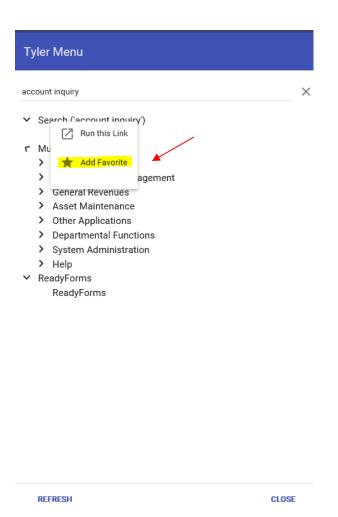
You can also create a Favorites list for your frequently accessed programs, sorting them by category for ease of use. In addition, the Mid-Del Munis Hub also provides the Recent Activity section that provides direct access to the ten most recently accessed programs. To return to a recently viewed program, click the program name in the Recent Activity list.

#### **Favorites**

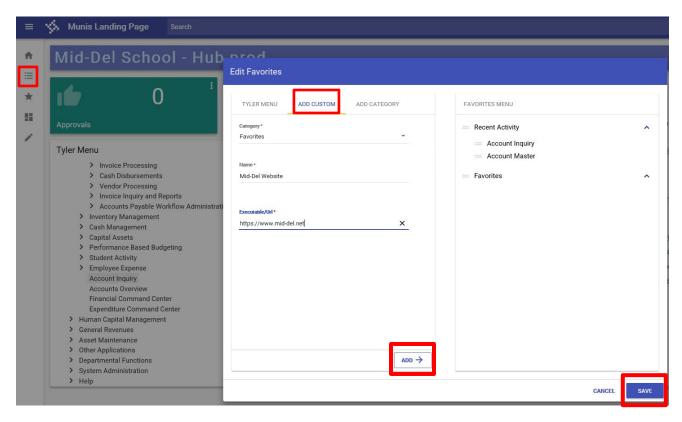
The Favorites group on the Munis Hub provides easy access to the Munis programs that you use frequently. On the left toolbar is the button on the Munis Hub, you can manually add programs to this list, or you can create new categories and add favorite programs to that group.

### Add a MUNIS Menu Program to My Favorites STEPS:

- 1. Click **Tyler Menu** ≡ in the left toolbar.
- 2. On the Tyler Menu, search or navigate to the desired program.
- 3. Right-click on the program desired and then click on 'Add to My Favorites'.



### Add a Website to My Programs STEPS:

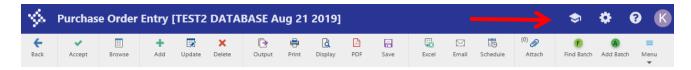


- 1. On the left side toolbar click on the Favorites button
- 2. In the Favorites window, click on Edit Mode.
- 3. In the **Category** field, choose from the list. Click on **Add Custom** to add a new link. (Note: You can create personalized categories by choosing **Add Category** at the bottom of the Edit Favorites window. Once the category has been added, it can be chosen from the list.)
- 4. In the **Name** field, enter the name that you want to appear in the My Favorites list.
- 5. In the **URL** field, enter the URL to the website, be sure to include the HTTP://.
- 6. Click the **Add** button. The website will appear in your Favorite list.
- 7. Don't forget to click the **Save** button.
- 8. To **Delete** favorite, click on **Edit Mode** and hover over favorite and click on trash can.

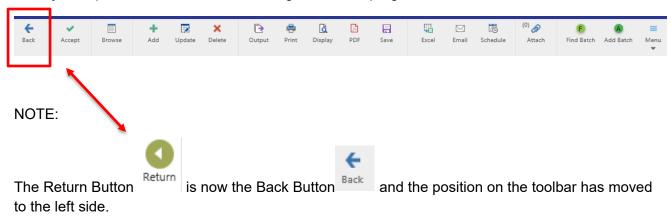
#### **Standard Screen Features**

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

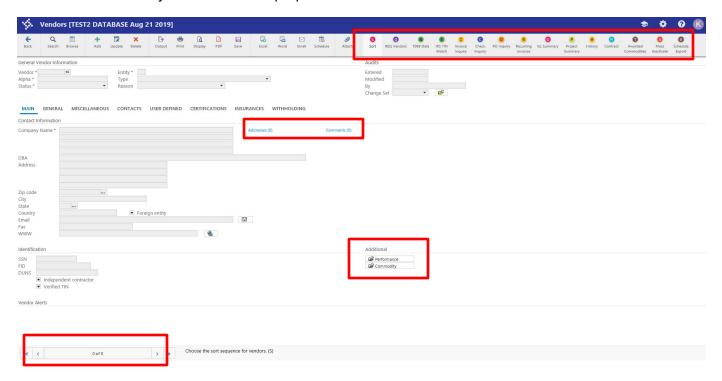
At the top of the screen, the header includes the Tyler U Classes, Settings, Help and Account button, which has several shortcuts as well.



Directly under the header is the Munis ribbon. This ribbon contains groups of related buttons that allow you to perform various actions throughout Munis programs.



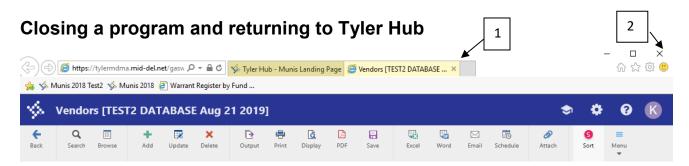
The work area for a Munis program is centered on the screen and contains the fields required to complete program actions. Often, if there are numerous fields, the work area is divided into tabs, which sort the fields by intended use or purpose.



The navigation bar at the bottom of the screen allows you to move through an active set of records, one record at a time, or to move directly to the first or last record of the set.

The Menu group in the ribbon provides the program-specific actions available for a program. These options differ by program. Sometimes menu options display additional screens for the selected program, and sometimes they open other related programs.

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

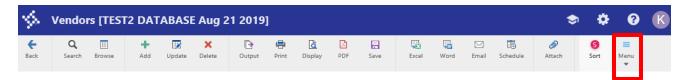


You have 2 choices to close a program and return to Tyler Hub:

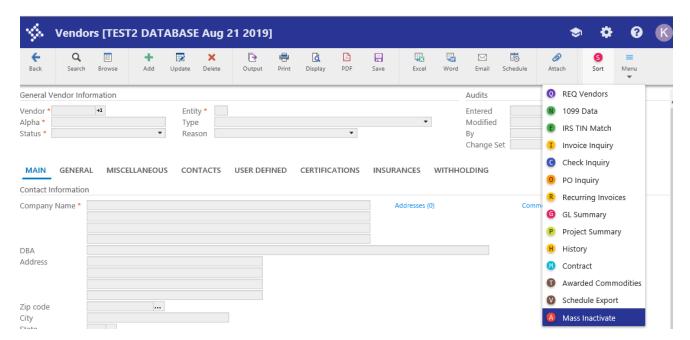
- 1. Click the X on the Tab and select Exit.
- 2. Click on the red X on the top right side of the screen

#### Minimizing the Ribbon

When you click the minimize button, the screen refreshes to display an abbreviated ribbon. This ribbon includes only the key options for managing records. Labels for the options do not display; however, if you hover your pointer over an option, the program provides a description.



The Menu option continues to provide access to a program's extended functionality.



When you select an action option (for example, Add or Update), the screen refreshes to display the Accept and Cancel options.



To see the explanations on your screen that are shown below, right click your mouse between any two icons on the top ribbon bar. Click on Enable Text at the bottom of the menu.

TIP: If your mouse is not between any two icons on the top menu bar, you will not see the Enable Text option at the bottom of the menu. Reposition your mouse and try again.

#### **Explanation of Munis icons**

The following table provides descriptions for the Munis ribbon groups and buttons. If a button is dimmed on a program screen, the selection is not available.

Button	Description	
Confirm	Confirm	
Back	Back closes the current screen and returns you to the previous screen of the active program. If you are on the first screen hitting the back button will completely close the program you are currently using.	
Back		
	Accept saves information after you create or update a record. This button is often highlighted when adding, updating, or searching for records.	
Accept		
Ø	Cancel ends an operation, such as adding or updating a record.	
Cancel		
Search		
Q	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	
Search	further define a search.	
	Browse is available when an active set of records exists, or after an active set is created using the Search 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	
Browse	screen. On a browse screen, the Excel button exports the data directly to a Microsoft® Excel spreadsheet.	

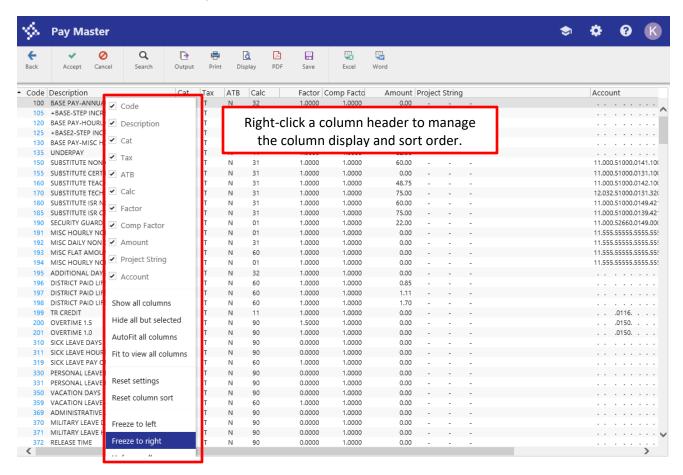
Button	Description
Actions	
Add	Add enters a new record into the database. When you click Add, entry fields become available with the cursor positioned in the first field. The program may place default values in fields to save you keystrokes, but typically you can replace the default values. Press <b>Tab</b> to move from field-to-field or select a field with the pointer. 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.
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 a key field, you must delete the record and enter it again.
X 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.
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.
Duplicate	i e e e e e e e e e e e e e e e e e e e
Output	
Print	Print sends a report directly to your default printer. In many instances, this output option provides 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.
Save Save	Save a report to a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. The Saved Reports program is available on the Departmental Functions menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
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.
Display	Display immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.
Display	

Button	Description
Office	
Excel	<ul> <li>Excel exports the active set of records to a Microsoft Excel spreadsheet.</li> <li>If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application.</li> <li>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</li> </ul>
Excel	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 records.  The file created during export is automatically saved to your Munis directory; 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.
Word	
Email	Email creates an email message that contains a hyperlink to the active record.  When the email recipient clicks the hyperlink, Tyler Hub opens, and in turn opens the Munis program with the linked record as the current record.  Note: This feature requires that the Tyler Hub page be enabled.
Email	
Schedule	Schedule displays the Appointments screen, which schedules meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message containing meeting start and end times, and a meeting
Schedule	description. You can define the meeting times and modify the description, as appropriate.  When the email recipient accepts the meeting, it is automatically added to his or her Exchange calendar.
Tools	
(0)	Attach allows you to view, add, or delete documentation related to the current record.
Attach	If your organization uses Tyler Content Manager (TCM), the Attachments option displays a Document Mappings dialog box. When you select an available mapping, the program opens TCM.
Attach	If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you can add or access documentation from your Munis server. 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: This option is accessible only if the View Attachments and Associated Documents    Note: The policy of the Delay   Marin Systems   System
	check box is selected in the Roles – Munis System program. In addition, the TylerCM for Munis Settings program must get setup to accommodate your attachments preference.

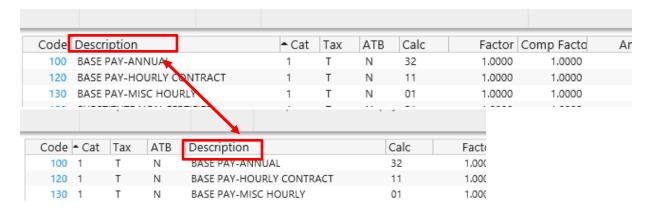
Button	Description
Text Text	Text provides the option for adding or updating notes for the selected record. If more than one type of Notes options are available, click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
Notify	Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone or email using predefined content.  Note: This feature is only available if your organization has implemented Tyler
Notify	Notify.
View History View History	View History provides a history for the selected record.
Menu	
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.
Menu	

#### **Table Headings**

On browse screens and in other instances where Munis provides information in a table format, the column headers for tables include column display and sort order options. To define the columns that display or to reset the sort order, right-click a column heading. Select or clear check boxes to add or remove items from the display, or use the options provided to reset the entire table.



Within a table, to change the order of columns, click a column header and drag it to a new postion.



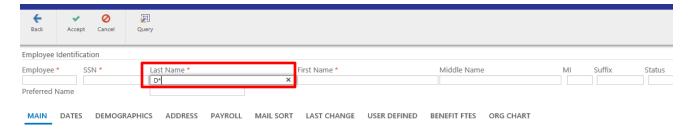
#### **Finding Records in Munis**

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.

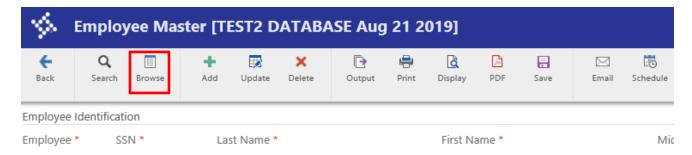
For the most efficient search, be sure to complete the Key or Required fields on the screen. Key and required fields are identified by boldface labels.

#### **Using Wildcard Card Characters in Searches**

Wildcard characters are symbols that refine your search criteria or provide a substitute for unknown values. Boxes where you can type characters or numerals accept wildcard characters. For example, in a Name field, if you type "J" and use the asterisk (\*) wildcard character, the program finds 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, 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 as 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.

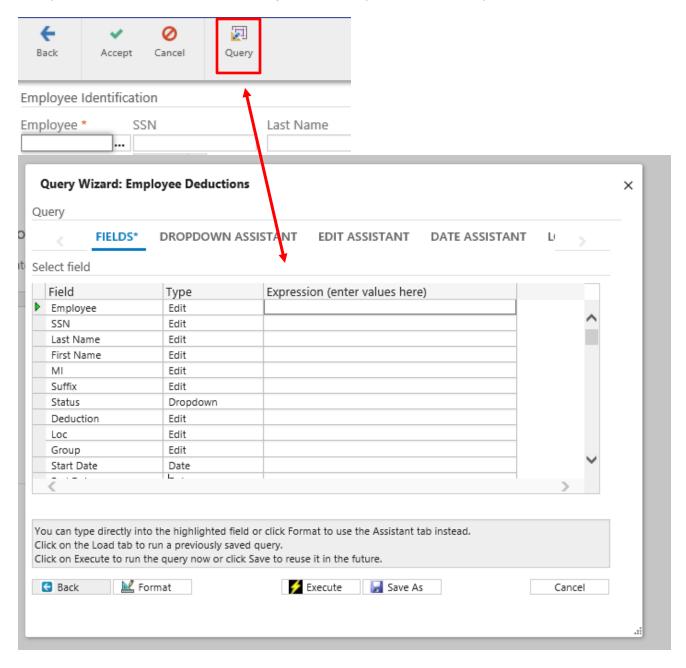
The following table provides a list of wildcard characters and their descriptions.

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
	Use to find records with a value less than the data typed in the box. For
	example, typing <l a–k.<="" data="" finds="" from="" th=""></l>
<=	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.
45 on l=	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
</th <th>example, typing &lt;&gt;1 finds all records where the value is not equal to 1. less than ASCII (33)</th>	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
. 01	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
	account, bank, credit.
	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
2	On.
?	single-character wildcard
	Use to find 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:
	oso to initia an couces, as follows.
	Start with N or T: [NT]*
	• •

Symbol	Description
	<ul> <li>Start in lowercase: [a-z]*</li> <li>Start in uppercase: [A-Z]*</li> <li>Use to find all two-character codes, as follows:</li> </ul>
	<ul><li>Start in lowercase: [a-z]?</li><li>Start in uppercase: [A-Z]?</li></ul>

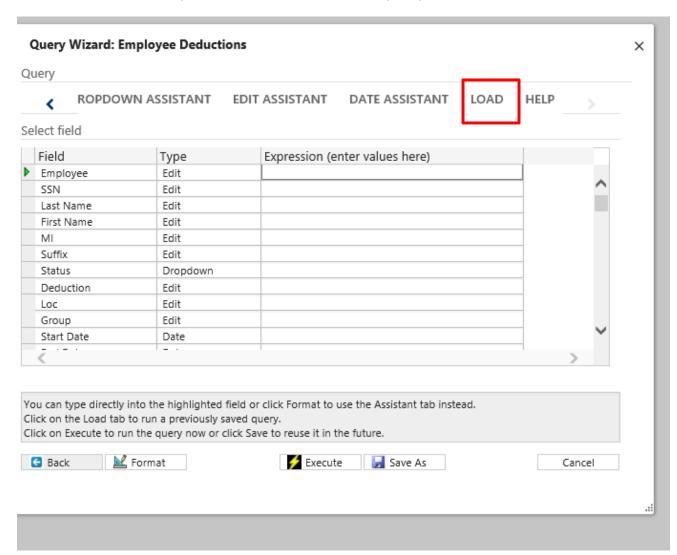
#### **Using Query (Advanced Find)**

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 Search.



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. 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:

- Click Search on the ribbon.
- 2. Click **Query Builder** 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.
- 3. 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.
- 4. Build an expression:
  - List expression.
    - Add items to include in your list expression.
  - 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.
- 5. Click Format again.
  - The list or range expression you created appears in the Fields tab.
- 6. 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 Fields tab or one of the Assistant tabs. Once you have created a query, you can view or select them using the Load tab.

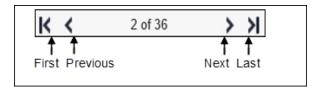
To remove an item from the Select List of Items on the Dropdown Assistant tab, double-click the item or press **Enter** to remove the item from the list.

**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, you can 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 2 of 36.



To navigate the active set of records:

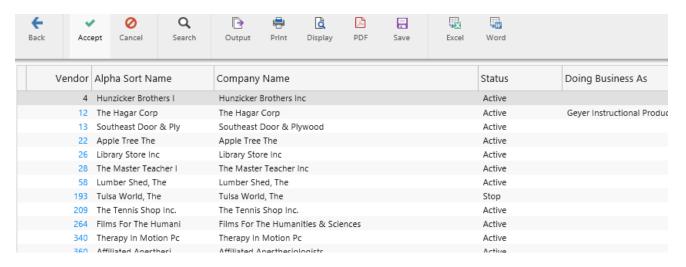
- Click **First** to view the first record in the active set (record 1).
- Click Previous to view record 1 of 36.
- Click Next to view record 3 of 36.
- Click Last to view the last record in the active set (record 36).

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

**Note:** The Attachments button displays in the navigation bar according to the parameters defined in the System Administration Site Settings program. If the Remove the Indicator from Application Main Screens check box is selected on the General tab of the Site Settings program, the Attachments button is not available in the navigation bar.

#### **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.



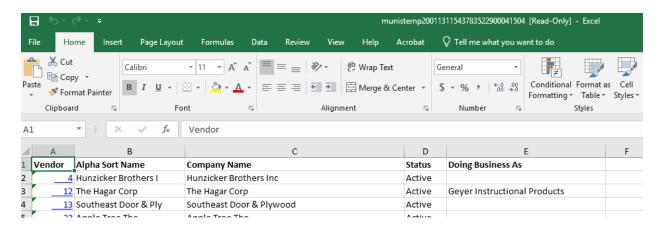
You can sort the data, view or hide columns, export the data, or filter the data to create a more specific data set:

- 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 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, the program exports the active set of records to a 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 that directs you to save the file to your workstation.

#### **Filtering Records**

The Munis browse screen includes a filter option that provides a filter for 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 to filter the data.
- 4. Click **Go** to execute the 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."
- 5. Click **OK** to continue.

#### Notes:

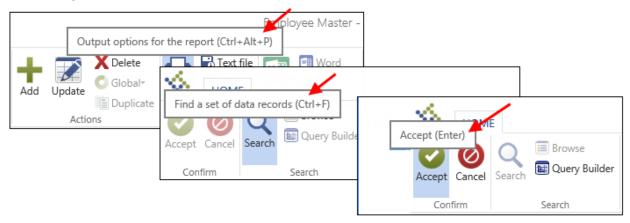
- Filters are not case-sensitive.
- Filter results are 'equal to' for date or numeric columns, and 'contains' for character columns (unless you include special characters such as >=).
- Totals, which can be any mix of sum, average, minimum, or maximum value, are recalculated for any filter.
- Format 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.

#### **Keyboard Shortcuts**

Munis provides task shortcut keys and menu shortcut keys that allow you to use your keyboard to complete tasks or access program options.

Task shortcut keys are available for actions typically initiated from the ribbon. When you hover your pointer over a ribbon option, a ToolTip provides a description and the applicable shortcut keys, as available. For example, if you hover your pointer over the Search option on the ribbon, the ToolTip indicates Ctrl+F as the shortcut for the action.



Available Shortcuts	
Shortcut	Action
Enter	Saves the active record.
Esc	Cancels changes to the active record.
Tab	Moves forward to the next available field; press <b>Shift+Tab</b> to move back to a previous field.
Space Bar	Clears or selects check boxes.
	Displays available options in a list field. Use the up and down arrows to move through the options; press <b>Enter</b> to select an option.
Ctrl+U	Initiates Update mode for the current record.
Ctrl+Alt+P	Prints the active record or active set of records.
Ctrl+I	Initiates Add mode in an active program.
Ctrl+F	Initiates the Search process.
Ctrl+D	Deletes the active record.
Ctrl+B	Provides a browse screen of the active set of records.
Ctrl+Down Arrow	Move to the next record in an active set.
Ctrl+Up Arrow	Move to the previous record in an active set.
Ctrl+Right Arrow	Move to the last record in the active set.
Ctrl+Left Arrow	Move to the first record in the active set.

Menu shortcut keys are assigned to the program-specific options available in the Menu group of the ribbon. These shortcut keys are programmatically created and assigned to the Menu group option in the following order:

- Alt+1 through Alt+0
- Alt+Shift+1 through Alt+Shift+0
- Ctrl+Alt+Shift+1 through Ctrl+Alt+Shift+0

These shortcut keys do not function with the numeric keypad; you must use Alt+[standard keyboard number] for these to work. In addition, these shortcut keys are assigned to existing Menu options, in the order the Menu options are currently arranged. If a new option is added between two existing options, the shortcut keys change from the point of the added option through the rest of the available options. The same is true if a Menu option is removed; in this case, all shortcuts from the deleted option through the remainder of the list are reassigned.