

# Tyler Munis End User Training

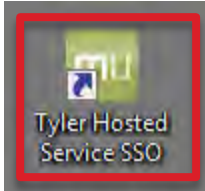
Computer log in  
Username: testuser  
Password: testuser



# Overview

- Tyler Munis is a financial system replacing JD Edwards on January 1st
- Payroll will be replaced on July 1st
- The move to Munis changes our accounts (cost centers) but will not change how we budget, cut checks, and many other processes

# How to sign into Munis



- Click on the Tyler Hosted Service SSO icon on your desktop

A screenshot of the 'Tyler Hosted Services Single Sign On' login window. The window title is 'Tyler Hosted Services Single Sign On'. The logo for Tyler Technologies is at the top left, with the tagline 'Empowering people who serve the public'. Below the logo, there are four input fields: 'Client Type' (a dropdown menu with 'Dashboard' selected), 'Select Environment' (a dropdown menu with 'Training' selected), 'User Name' (containing '6750gzimmer'), and 'Password' (containing masked characters). There are 'Go!!' and 'Cancel' buttons at the bottom. Red boxes highlight the 'Client Type', 'User Name', and 'Password' fields.

- Select “Dashboard” for client type.
- Enter your user name
  - This is 6750 First Letter of First name and First 7 Letters of Last Name (ie: 6750AHernand or 6750JSmith)
- Your initial password is Racine16 or NeedNew1
- Click Go!!
- Select “Live”

A screenshot of the 'Tyler technologies Munis SaaS Dashboard'. The header shows the Tyler Technologies logo and the text 'Munis SaaS Dashboard'. Below the header, it displays user information: 'User: 6750gzimmer | Client: MU6750 | Name: Racine County'. The main content area is titled 'Select an environment' and contains a table with four rows, each representing a different environment. The table has two columns: 'Name' and 'Database'.

Name	Database
Live -v11.2	Live Database
Test -v11.2	Test Database
Train -v11.2	Train Database
IMPL -v11.2	IMPL Database

# Intro to Dashboard

- The dashboard is your main home screen. You can add Web Parts (apps) and favorites (bookmarks)

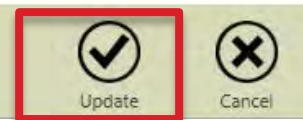
The screenshot shows the Tyler Dashboard interface for Racine County, WI - Live. The top navigation bar is dark blue and contains the following elements from left to right: 'BROWSE', 'DASHBOARD', a user profile icon for 'Gwen Zimmer', 'MY TYLER', 'VIEWS', 'TYLER MENU', and 'WEB PARTS'. The 'WEB PARTS' button is highlighted with a red box. Below the navigation bar, the dashboard title 'Tyler Dashboard' is displayed next to a search bar. On the left side, a 'My Favorites' button is highlighted with a red box, along with 'Recent Activity' and 'EDIT FAVORITES' options.

- Click “Web Parts” then MUNIS Workflow then Approvals (Tile). Click Update.



### Manage Personal Web Parts

The screenshot shows the 'Manage Personal Web Parts' interface. On the left, there are three tabs: 'Munis', 'SharePoint', and 'Dashboard'. Under the 'Munis' tab, a list of web parts is shown, including 'Accounts Payable', 'Accounts Receivable', 'Budgeting', 'Business Licenses', 'General Ledger', 'Human Resources', 'MUNIS Workflow', 'Approvals (Tile)', 'Notifications (Tile)', 'Alerts (Tile)', and 'Work Flow Manager'. The 'MUNIS Workflow' and 'Approvals (Tile)' items are highlighted with red boxes. A red arrow points from the 'Approvals (Tile)' item to a corresponding 'Approvals (Tile)' tile in the main workspace. The workspace is divided into four sections: 'Tile' (top-left), 'Right Tile' (top-right), 'Header' (middle), and 'Left' and 'Right' (bottom). The 'Approvals (Tile)' tile is currently placed in the 'Tile' section.

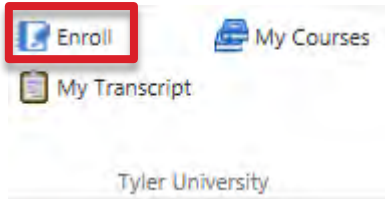


# Sign in to Tyler University

BROWSE

DASHBOARD

- On the Dashboard, click on Dashboard



- Click on Enroll

## Enrollment

### DEFAULT MESSAGE

There were no records found. Make sure the Tyler Use

Tyler U ID:

Tyler U Password:

Save Profile

- Enter your county email address  
Your initial password is tyler123  
Click Save Profile

# How will your accounts change?

- Munis uses Orgs instead of Cost Centers
  - In JDE, Sheriff's cost center is 10180
  - In Munis, it is 11800000
- All objects codes will be universally shared
  - In JDE, the object code for Office Supplies is 7010
  - In Munis, the object code is 441500
- Some departments will be using Projects (HSD, BHS, PW) for better tracking and reporting
- Finance Department will be providing a copy of the 2017 Budget with new Munis account numbers

# Introduction to Centrals

- Munis uses programs called Centrals to easily look up information
- Centrals will give a good overview and allow you to dig in deeper



- Click on Tyler Menu

## Tyler Menu

- In the search box, type “central” and press enter

• Munis

• Search ('central')

Invoice Central

Vendor Central

Account Central

Contracts Central

Purchase Order Central

- All Centrals programs that you have access to will appear. Click on Vendor Central



# Vendor Central

Search by vendor name

[Advanced Search](#)

The first screen pulls up a search box. Type in Racine and press enter.

VENDORS

racine

Advanced My Searches

Search Office

Vendors: 58

CARLSON RACINE ROOFING AND 1441 ACTIVE	CENTRAL RACINE COUNTY HEALTH DEPT 1468 ACTIVE
EYE CLINIC OF RACINE LTD 1847 ACTIVE	FAMILY SERVICE OF RACINE 1855 ACTIVE

This pulls up all vendors with the word “Racine” in their name.

FAMILY SERVICE OF RACINE  
1855  
ACTIVE

Click on Family Service of Racine

Settings

×

Available tiles

1099 History

Addresses

Commodities

Vendor

Select all

Unselect all

OK

Cancel

The first time will require you to click Select All and OK

racine

Advanced

Search

Vendor Performance

View/Maintain

Office Tools

## FAMILY SERVICE OF RACINE

ACTIVE

1099 History

Commodities  
0

Addresses  
0

**Vendor**  
Vendor Number  
1855  
Entity  
1  
Type  
Performance

Invoices Checks Purchase Orders Contracts

Time frame

No invoice records found.

This will show a brief overview of the vendor including invoices paid, checks issued, purchase orders, or contracts.

Click on Vendor.

# FAMILY SERVICE OF RACINE: Vendor

ACTIVE  

Main Information

Payment/Miscellaneous

## GENERAL

Vendor Number  
1855

Status  
ACTIVE

Status Reason  
*no data*

Entity  
1

Type  
*no data*

Performance  
*no data*

## IDENTIFICATION

SSN  
*no data*

FID  
39-0808507

DUNS  
*no data*

## CONTACT INFORMATION

Other Name  
*no data*

DBA  
*no data*

Address  
420 7TH ST  
RACINE WI 53403

Email  
*no data*

Web Site  
*no data*

## IRS INFORMATION

1099 Vendor  
Yes

Default Code

Backup Withholding  
No

W-9 Sent  
Yes

W-9 Received  
No

## ADDITIONAL CONTACTS

No vendor contacts found.

This is the new vendor number. If the status is Active, they are available to be used for AP, PO's or Contracts

This is the tax ID number

This is the current address

If we have an email address or website, it'll show here

We can add contacts to a vendor

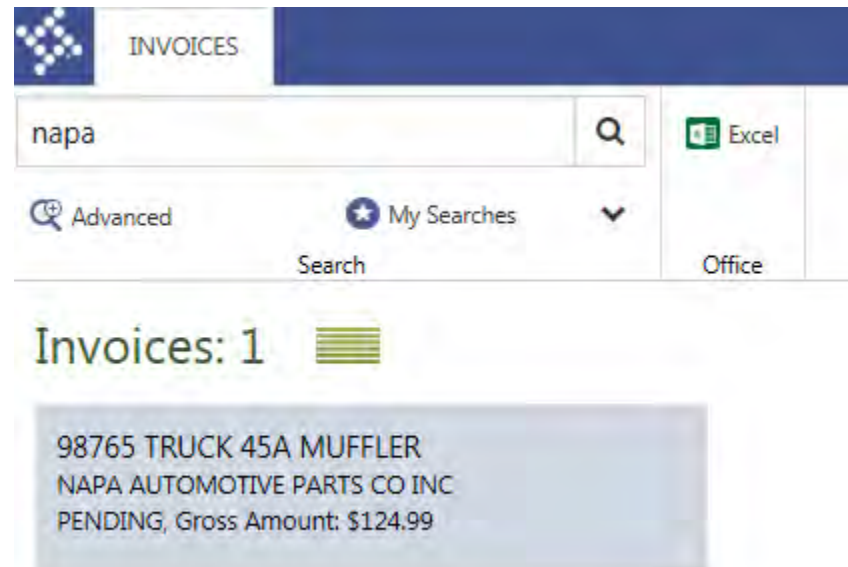
# Invoice Central

Search by vendor name or invoice number

[Advanced Search](#)

The first screen pulls up a search box. Type in Napa and press enter.



This pulls up all invoices with the word “Napa” in their name.

98765 TRUCK 45A MUFFLER  
NAPA AUTOMOTIVE PARTS CO INC  
PENDING, Gross Amount: \$124.99

## Click on Napa Automotive Parts

**98765 TRUCK 45A MUFFLER**  
PENDING, [NAPA AUTOMOTIVE PARTS CO INC](#)

Journal Number:  
Year / Period: 2016 / 12

**Invoice** [Payment](#) [Invoice Details](#) [Withholdings](#)

### GENERAL

Purchase Order <i>no data</i>	Department PUBLIC WORKS & DEVEL...
Contract <i>no data</i>	Voucher <i>no data</i>

### AMOUNTS

Gross	124.99
Discount	0.00
Tax	0.00
Net	124.99

### DATES

Invoice	12/13/2016
Due	12/13/2016
Discount	<i>no data</i>
Received	12/13/2016

This pulls up information about the invoice that was paid to Napa.

Invoice **Payment** Invoice Details Withholdings

GENERAL

Payment Method Normal	Check Number <i>no data</i>	Check Status <i>no data</i>	Clear Date <i>no data</i>
Cash Account 10 101101	Check Run <i>no data</i>	Check Date <i>no data</i>	Check Amount \$0.00

Payment will show info about the check, including check number and date.

Invoice Payment **Invoice Details** Withholdings

Description	Line	Project Account	Org	Obj	Proj	1099 Code	Amount
+ TRUCK 45A MUFFLER	1		660230	418500		N	124.99

Invoice Details will show what account number was charged for the invoice.

# Account Central

## Search

<i>Fund</i>	<i>Org</i>	<i>Object</i>	<i>Project</i>	Q
-------------	------------	---------------	----------------	---

[Advanced Search](#)

The first screen pulls up a search box. Type in 660230 in the Org and press enter

<i>Fund</i>	660230	<i>Object</i>	<i>Project</i>	Q	Excel	Totals
Advanced	My Searches		▼		Office	Options
Search						

Accounts: 25

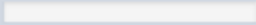
MISCELLANEOUS REVENUE 660230-329000- 0% Used  Available 0.00	SALE OF MATERIALS 660230-329500- 0% Used  Available 0.00
LICENSES/PERMITS 660230-418000- 0% Used  Available 0.00	VEHICLE REPAIRS 660230-418500- 0% Used  Available -124.99

This pulls up all of the objects available to this org Shop Operations



VEHICLE REPAIRS

660230-418500-

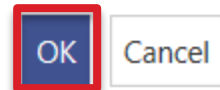
0% Used  Available -124.99

Click on Vehicle Repairs

Available columns

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Amount           | <input type="checkbox"/> Check #           |
| <input type="checkbox"/> Comment                     | <input type="checkbox"/> EffectiveDate     |
| <input checked="" type="checkbox"/> Original Details | <input type="checkbox"/> Posted            |
| <input type="checkbox"/> Ref 1                       | <input type="checkbox"/> Ref 2             |
| <input type="checkbox"/> Ref 4                       | <input checked="" type="checkbox"/> Vendor |
| <input type="checkbox"/> Voucher                     | <input type="checkbox"/> Warrant           |

Select all   Unselect all   Default



The first time will require you to click OK

# VEHICLE REPAIRS

660230-418500-

Account

Segments

Monthly Data

Budget Rollup

Current Year vs. CFWD

## Account Totals

	2017	2016	2015	2014
Original Budget	0.00	0.00	0.00	0.00
Transfers	0.00	0.00	0.00	0.00
Revised Budget	0.00	0.00	0.00	0.00
Actual (Memo)	0.00	124.99	0.00	0.00
Encumbrances	0.00	0.00	0.00	0.00
Requisitions	0.00	0.00	0.00	0.00
Available Budget	0.00	-124.99	0.00	0.00
Percent Used	0 %	0 %	0 %	0 %

The Account tab shows the current year and three year history for budget, actuals, available budget, and percent used

▼ Transactions 2016 ▼

**Total Amount: \$124.99**

Original Budget	0.00
Transfers	0.00
Revised Budget	0.00
Actual (Memo)	124.99
Encumbrances	0.00
Requisitions	0.00

Source	Year	Period	Journal	Amount	Original	Vendor
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<a href="#">API</a>	2016	12	0	124.99	<a href="#">Details</a>	<a href="#">NAPA AUTOMOTIVE...</a>

Opening the Transactions window will show details about transactions in this account. To see more information about the invoice paid, you can click on any of the blue hyperlinks to move to that central's program.

# Workflow in Munis

- Munis allows workflow to help automate processes and limit paperwork
- You may see activity on your dashboard in the Approvals web part which will require you to approve or reject work
- Workflow varies by department but can include Accounts Payable, Journal Entries, Purchase Orders, Contracts, and Cash Receipts



Racine County, WI - Train

# Tyler Dashboard

▼ My Favorites

- Journal Inquiry/Print
- General Journal
- Entry/Proof
- Account Inquiry
- Invoice Entry
- Account Master

Racine County, WI - Train

Approvals

**1**

0 unread

Notifications


**1**

0 unread

If workflow has been sent to you, it will be shown on the Approvals web parts

## Approvals


By Process Code **By Date**



*All Process Codes* 

VIA: Vendor profile creation approval  
New vendor profile record approval re... Thu Nov 10 2016

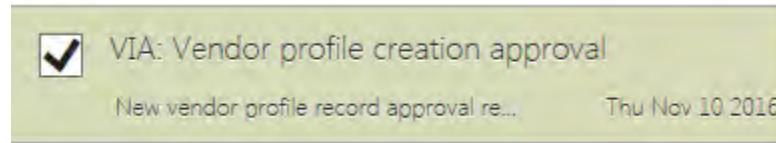
[VIA: Vendor profile creation approval](#)

**Created** Thu Nov 10 2016  
**Reason** Approval of one or more vendor fields is required.

<b>General Description</b>	New vendor profile record approval required	
<b>Vendor Number</b>	3055	
<b>Vendor Name</b>	NAPA AUTOMOTIVE PARTS CO INC	
<b>Group</b>	Remit Address	
<b>Field</b>	Name	
<b>Old Value</b>		
<b>New Value</b>	NAPA AUTOMOTIVE PARTS CO INC	
<b>Group</b>	Remit Address	
<b>Field</b>	AddressLine1	
<b>Old Value</b>		
<b>New Value</b>	4321 WASHINGTON AVE	
<b>Group</b>	Remit Address	
<b>Field</b>	AddressLine2	
<b>Old Value</b>		
<b>New Value</b>		

 Refresh  Close

Clicking on the Approvals will show all work that needs to be approved



Clicking on the approval item will bring up available actions



The work can be approved, rejected, held, or forwarded

Questions, comments or concerns?