



Using Enterprise ERP *powered by Munis®*

2021.6

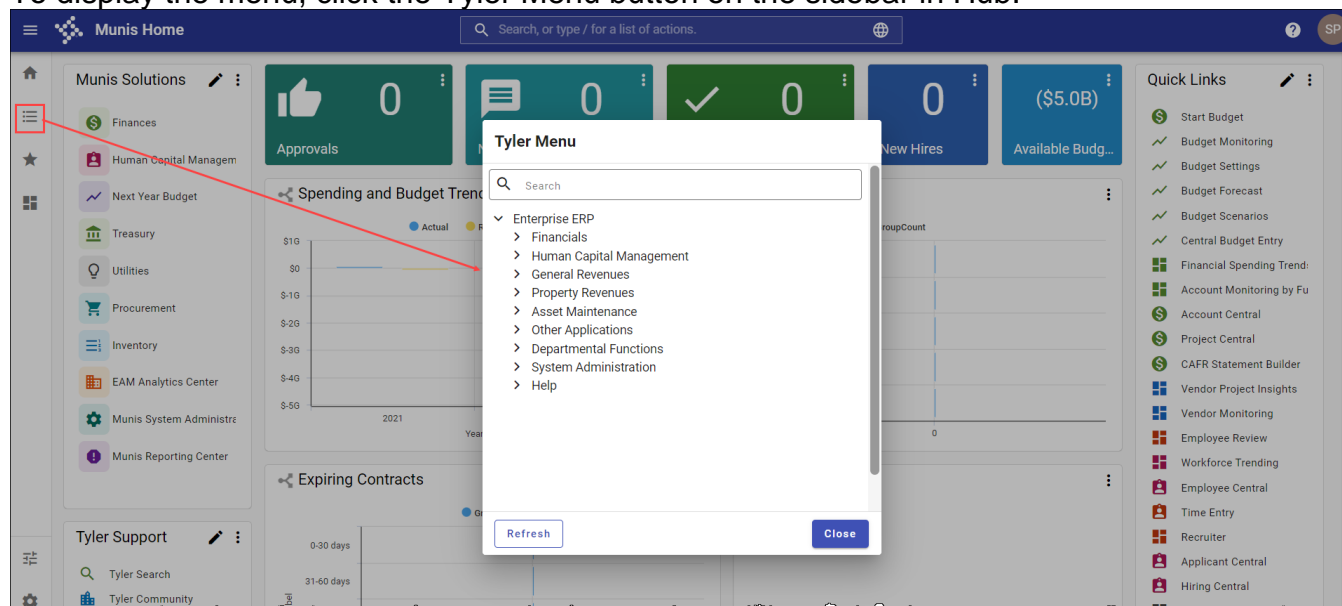
TABLE OF CONTENTS

Using Enterprise ERP, powered by Munis.....	3
Enterprise ERP Permissions and Security	4
Enterprise ERP Menus.....	5
Standard Screen Features	6
Help	8
Settings	9
Toolbar	10
Keyboard Shortcuts	13
Table Headings	15
Finding Records in Enterprise ERP	16
Using Wildcard Characters in Searches	16
Using Query (Advanced Search)	19
Managing Selected Records	20
Browsing Records	21
Exporting Records.....	21
Filtering Records.....	22
Reports	23
Enterprise ERP Scheduler.....	24
Attach/Content Manager.....	28
Enterprise ERP Server	28
Content Manager	29
Excel and Word.....	31
Excel.....	31
Word.....	32

Using Enterprise ERP, powered by Munis

Using Enterprise ERP, powered by Munis provides details for standard Enterprise ERP, powered by Munis® screen, toolbar, and menu options. It also provides an overview of several features that enable you to efficiently manage information within Enterprise ERP programs.

To display the menu, click the Tyler Menu button on the sidebar in Hub.



You can also add the Tyler Menu card to your home page or add the Enterprise ERP Landing Page. See the *Hub User Guide*, available from the Tyler group on Tyler Community, for more information on managing cards and pages in Hub.

Using the Search box on the Tyler Menu, you can search for Enterprise ERP programs by name. When you complete a search, results for multiple instances of the same program are summarized. For example, if there are two instances of an identical Employee Master program on your menu, the search results display Employee Master (2). For programs with identical

names that are not identical programs, the search results display the name for each program.

Tyler Menu

✕ employee master

▼ Search ("employee master")

Civil Service Employee Master

Employee Master (2) ←

Pension Employee Master

Projection Employee Master (3)

Terminated Employee Master

▼ Enterprise ERP

> Financials

> Human Capital Management

> General Revenues

> Property Revenues

> Asset Maintenance

> Other Applications

> Departmental Functions

> System Administration

> Help

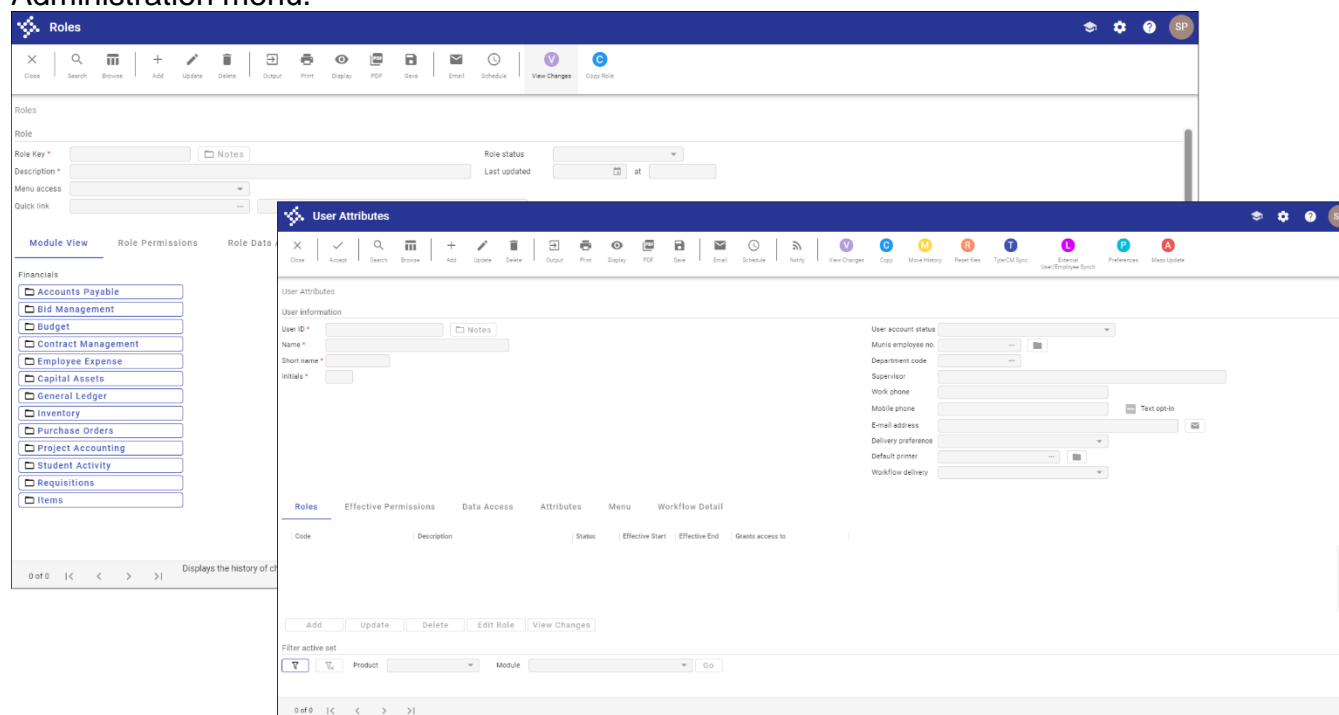
Refresh

Close

Enterprise ERP Permissions and Security

Permissions and security settings determine the programs and options available to individual Enterprise ERP users. User permissions and security settings are typically determined by a user's responsibilities as they relate to using the Enterprise ERP system. For example, an employee who enters payroll information does not necessarily require permissions to access the Tax Billing programs. Permissions and security settings are maintained by system administrators using the Roles and User Attributes programs available on the System

Administration menu.



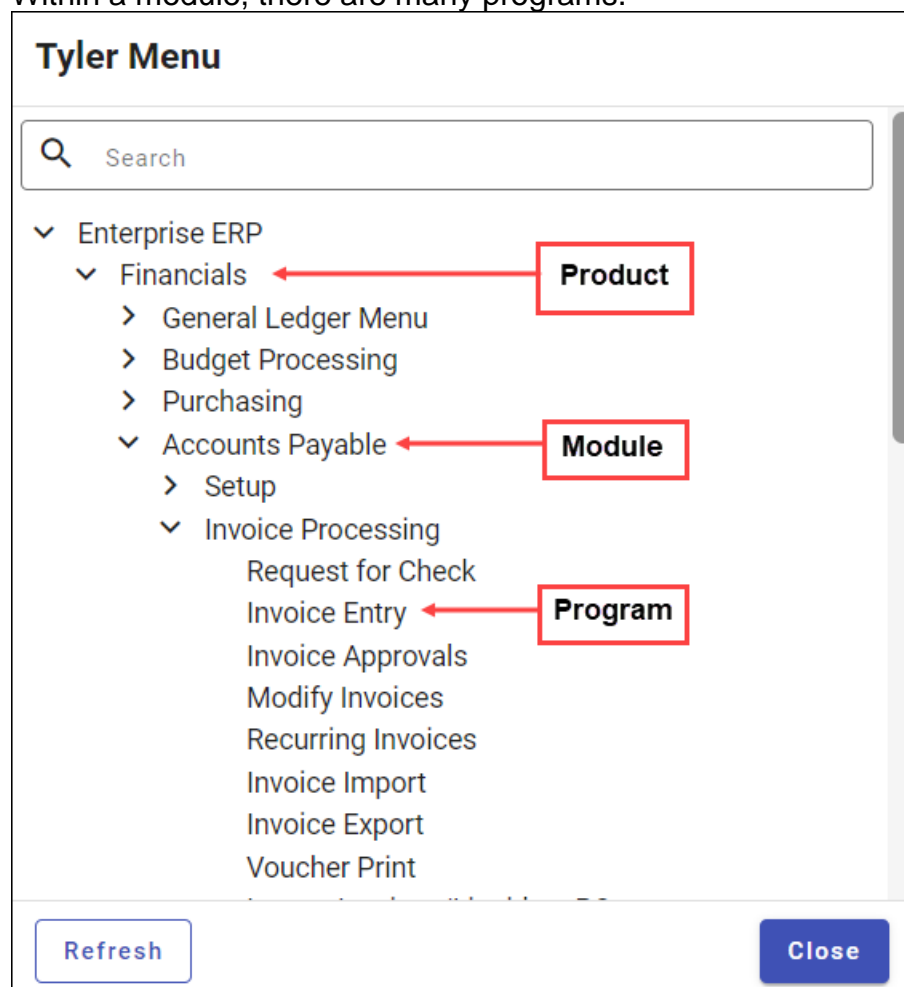
The screenshot displays two overlapping windows from the Tyler Technologies administration interface. The top window, titled 'Roles', shows a form for creating or editing a role. It includes fields for 'Role Key', 'Description', 'Menu access', and 'Quick link'. A sidebar on the left lists various modules under the 'Financials' product, such as 'Accounts Payable', 'Bid Management', 'Budget', 'Contract Management', 'Employee Expense', 'Capital Assets', 'General Ledger', 'Inventory', 'Purchase Orders', 'Project Accounting', 'Student Activity', 'Requisitions', and 'Items'. The bottom window, titled 'User Attributes', shows a form for creating or editing a user. It includes fields for 'User ID', 'Name', 'Short name', 'Initials', 'User account status', 'Munis employee no.', 'Department code', 'Supervisor', 'Work phone', 'Mobile phone', 'Email address', 'Delivery preference', 'Default printer', and 'Workflow delivery'. Both windows have a top toolbar with icons for various actions like 'Close', 'Search', 'Add', 'Update', 'Delete', 'Output', 'Print', 'Display', 'PDF', 'Save', 'Email', 'Schedule', 'View Changes', and 'Copy Role'.

Enterprise ERP Menus

In Enterprise ERP, menus are available according to the security permissions granted to your user role. Typically, permissions are granted according to need. For example, if your primary job is to enter timesheets in Payroll, then the System Administration, Financials, and General Revenues menu options might not be available.

Menus are divided by Enterprise ERP products, and then by modules within those products. For example, Financials is a product and Accounts Payable is a module within that product.

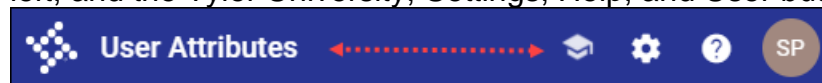
Within a module, there are many programs.



Standard Screen Features

The standard Enterprise ERP program screen contains several working sections, including the omnibar, a toolbar, and a navigation bar.

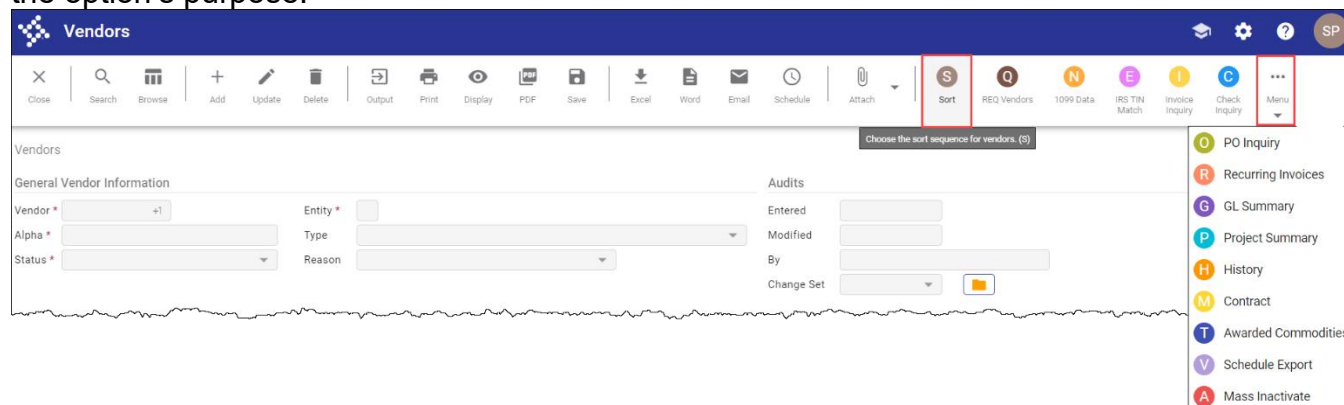
At the top of the screen, the omnibar includes the Tyler logo, and the program name on the left, and the Tyler University, Settings, Help, and User buttons on the right.



Directly under the omnibar is the toolbar. The toolbar provides all the options that allow you to perform various actions throughout the individual Enterprise ERP programs. The toolbar updates according to the options available within the active program screen. To the left, the toolbar provides the standard options available for adding or maintaining records and reporting; to the right, the toolbar provides the options specific to managing data in the active program.

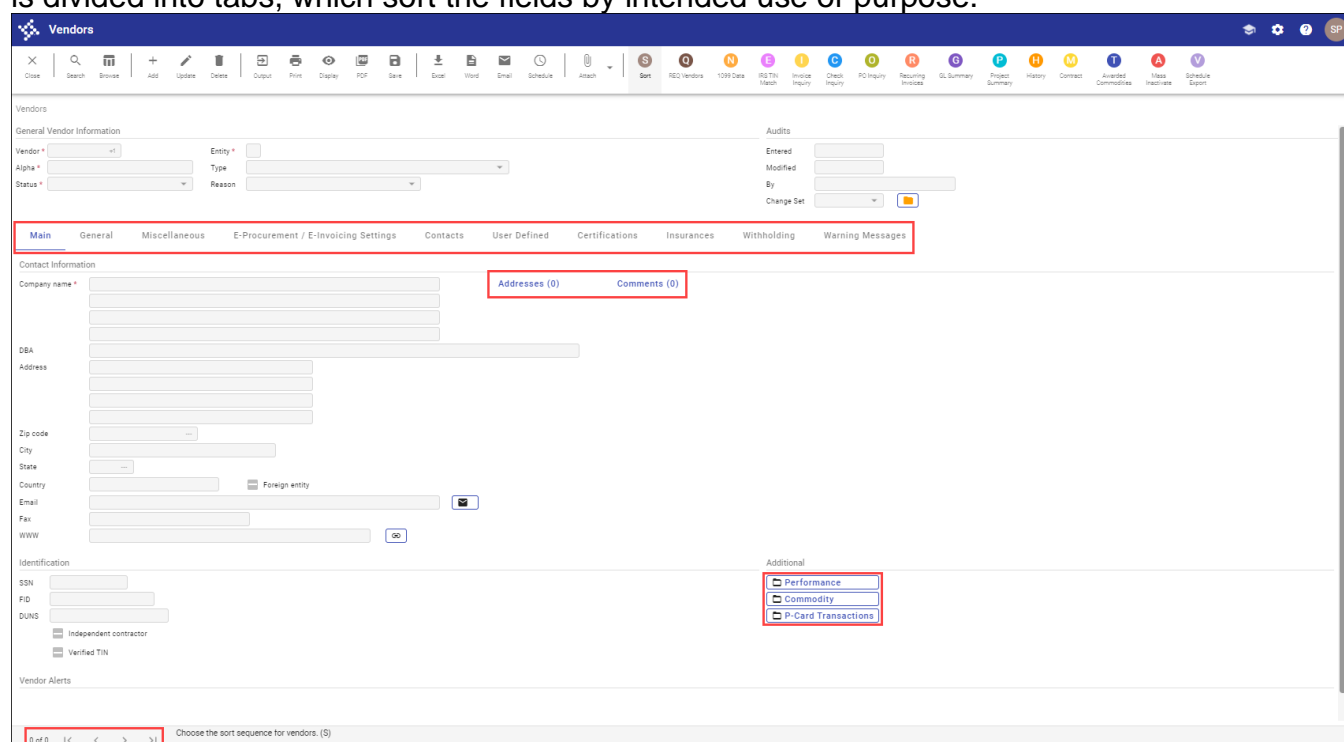
When a program contains many program options, the Menu list provides access to those not displaying directly on the toolbar. Hovering over the option name displays a brief description of

the option's purpose.



The screenshot shows the top of the Vendors screen. The navigation bar includes icons for Close, Search, Browse, Add, Update, Delete, Output, Print, Display, PDF, Save, Excel, Word, Email, Schedule, Attach, Sort, REQ Vendors, 1099 Data, IRS TIN Match, Invoice Inquiry, Check Inquiry, and a Menu icon. The Menu dropdown is open, showing options: PO Inquiry, Recurring Invoices, GL Summary, Project Summary, History, Contract, Awarded Commodities, Schedule Export, and Mass Inactivate. The main area shows the 'General Vendor Information' tab with fields for Vendor, Alpha, Status, Entity, Type, Reason, Audits, Entered, Modified, By, and Change Set.

The work area for an Enterprise ERP 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.



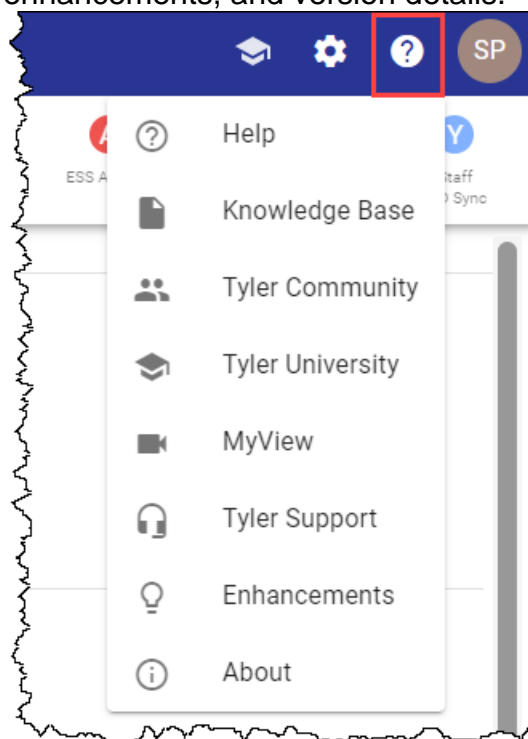
The screenshot shows the main work area of the Vendors screen. The 'Main' tab is selected, showing fields for Contact Information (Company name, DBA, Address, Zip code, City, State, Country, Email, Fax, WWW) and Identification (SSN, FID, DUNS, Independent contractor, Verified TIN). The 'Addresses (0)' and 'Comments (0)' links are highlighted. The 'Additional' section includes links for Performance, Commodity, and P-Card Transactions. The bottom navigation bar shows '0 of 0' records and navigation controls.

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.

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.

Help

In the omnibar, the Help button provides access to Enterprise ERP online help content, the KnowledgeBase, Tyler Community, Tyler University, MyView, Tyler Support, program enhancements, and version details.

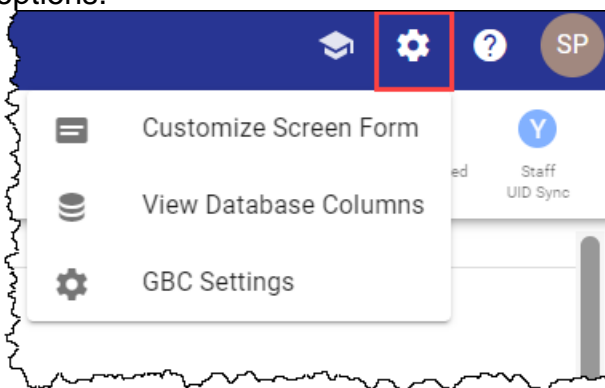


- **Help**—Provides screen-level help for programs and subprograms throughout the Enterprise ERP applications. A typical help screen includes an overview, a list of procedures, and a field descriptions table. You can access additional resources, release notes, and additional help topics from the table of contents.
- **Knowledge Base**—Provides resource documentation for all Enterprise ERP products. When you access the knowledgebase using the Help button, the resulting search screen automatically displays a list of documents related to the active program. When you access the knowledgebase from the Help menu, knowledgebase search functionality is not available.
- **Tyler Community**—Accesses Tyler Community, a user-driven support community that provides user forums, product documentation, resource pages, and opportunities to submit product suggestions. You must have a Tyler client-support log-in to access Tyler Community.
- **Tyler University**—Initiates an interactive help session that guides you through a selected process. When you click Tyler University, the program displays a How Can We Help You? dialog box that provides a list of actions for which guidance is available for the selected program.
- **MyView**—Captures video of a process to include with an incident submission to Tyler Support. Using MyView requires that you adhere to your organization's security policies and procedures. It is recommended that you review your organizational guidelines prior to consenting to use MyView.

- Tyler Support—Opens the Tyler Client Support website where you can choose your Tyler product and request access to live support or online support incidents.
- Enhancements—Provides a link to current enhancement notes that apply to the active program. This feature is enabled on the General tab of the System Settings > Site Settings program.
- About—Accesses program, system, and environment information, which is useful when initiating a phone call to Enterprise ERP Technical Support as it identifies the version of the software you are using. Knowing which version of the software you are currently using enables Enterprise ERP Technical Support to tailor solutions to your specific needs.

Settings

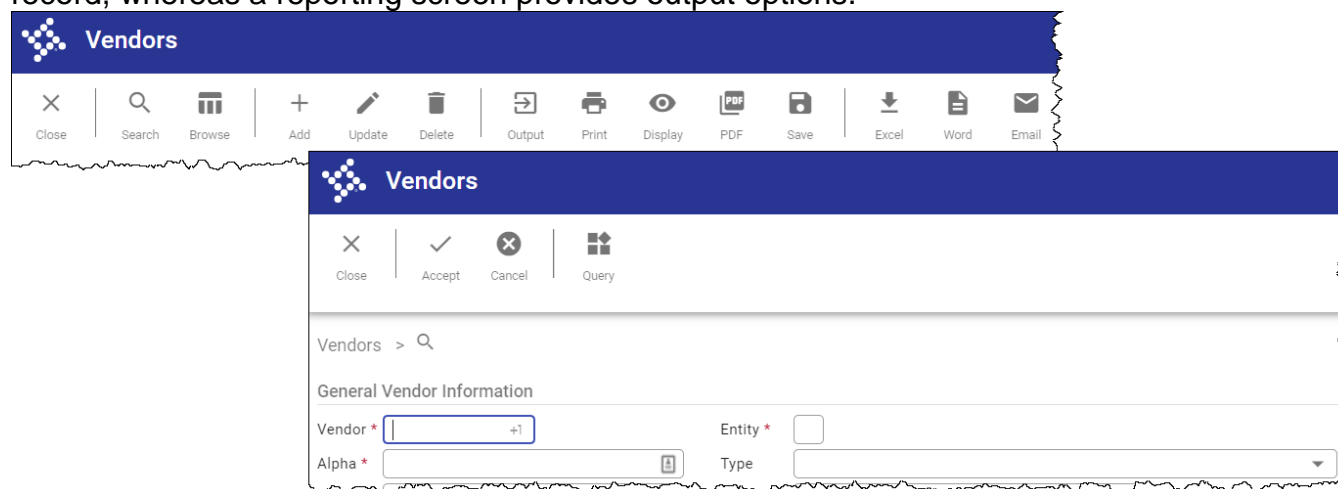
Settings provides the Customize Screen Form, View Database Columns, and GBC Settings options.



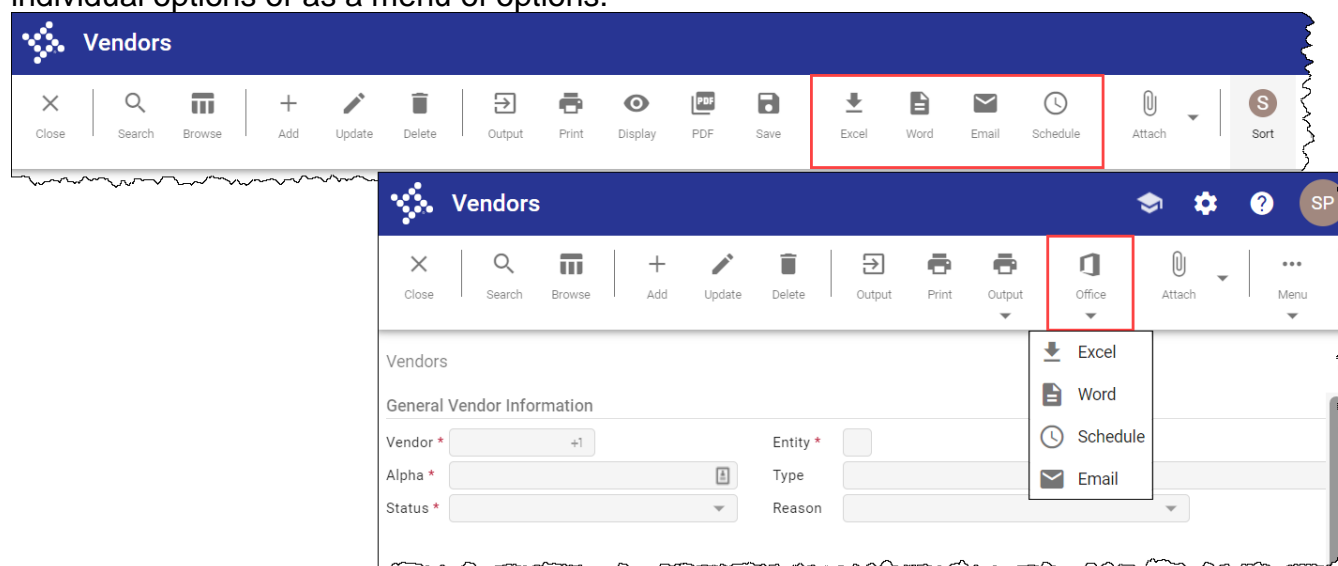
- Customize Screen Form—Allows system administration personnel to customize the text and tooltips found on standard Enterprise ERP screens. This option is only available if the Customize Munis Screen Forms checkbox on the Munis System Roles screen is selected for at least one role assigned to your user ID.
- View Database Columns—Allows you to view the database headers for the fields on the screens. This option is only available if the Allowed to View Database Detail checkbox in Munis System Roles is selected for at least one role assigned to your user ID.
- GBC Settings—Clears personal settings for features such as hidden columns, column layout, and sort order.

Toolbar

The available options on the toolbar adjust according to the functionality offered on the active screen. For example, a search screen displays only those options applicable to finding a record, whereas a reporting screen provides output options.

















Furthermore, the toolbar dynamically adjusts to condense options based on the size of the window. For example, depending on your display, Office options might be provided as individual options or as a menu of options.










The following table provides descriptions for common toolbar options.

Option	Description
Accept ✓	Accept saves information after you have created or updated a record. This button typically displays when you are adding, updating, or searching for records.
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 can place default values in fields to save you keystrokes, but

Option	Description
	typically you can replace the defaults. You can move from one field to the next by pressing Tab , by using the arrow keys, or by placing the cursor in a field. When the cursor is in a field, the program often displays helpful information at the bottom of the screen. Some fields have an additional field help button that lists available entries.
Attach 	<p>The Attach option attaches documents or other online files to the current record. In the Munis System Roles program, the View Attachments and Associated Documents permission must be granted for this option to be available.</p> <p>The Attach process varies according to the settings defined in the TylerCM for Munis Settings program in System Administration:</p> <ul style="list-style-type: none"> • If the Content Management System list is set to Tyler Content Manager and the value of the Munis Attachments Type list is either Use Content Management or Disable Munis Attachments, then clicking the Attach option provides a list of additional options: Attach, Create New, and Document Mappings. The Attach option opens Content Manager, the Create New option opens Content Manager and displays the Choose Document Type box, which lists document templates, and the Document Mappings option opens the Document Mappings box. • If the Content Management System list is set to Tyler Content Manager and the value of the Munis Attachments Type list is Use Munis Server, then clicking the Attach option provides a list of the following options: Attach, Open TCM, and Document Mappings. The Attach option opens the Munis Attachments screen, Open TCM opens Content Manager, and Document Mappings opens the Document Mappings screen. • If the Content Management System list is set to None and the value of the Munis Attachments Type list is Use Munis Server, then the program provides the Attach button. Clicking Attach opens the standard Munis Attachments screen, where you can add or maintain attachments on your Enterprise ERP server. • If the Content Management System list is set to None and the value of the Munis Attachments Type list is Disable Munis Attachments, then the Attach option is hidden from the toolbar.
Back 	Back returns you to the main menu if you are currently viewing a primary program screen, or to the previous screen if you are viewing a secondary program screen.
Browse 	Browse is available when an active set of records exists, or after an active set is created using the Search or Define button. The browse screen displays a list of all the records in the active set. You can sort, view, or export data from the browse screen. The Excel button exports the data directly to a Microsoft® Excel spreadsheet.
Cancel 	Cancel ends an operation, such as adding or updating a record.

Option	Description
Close 	Close closes the program.
Delete 	Delete removes the currently displayed record or set of records 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.
Display 	Display allows you to immediately preview a report on the screen.
Email 	Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, the Enterprise ERP program opens and displays the linked record.
Excel 	<p>Excel exports the active set of records to a Microsoft Excel spreadsheet.</p> <ul style="list-style-type: none"> If you click Excel from a browse screen, the program immediately exports the data and opens Microsoft Excel. 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 export to Microsoft Excel. When you click Save and Exit, the program opens Microsoft Excel with the selected data in the active worksheet. <p>In each case, the program inserts hyperlinks to the individual Enterprise ERP records. The file created during export is automatically saved in the directory where the Enterprise ERP software is installed; use the Save As feature in Excel to save the file to a new location.</p>
MapLink 	MapLink allows integration of map data sources with Enterprise ERP programs. The web-based version of MapLink is an inquiry-only version. The MapLink application is not launched as an interactive application; however, you can view a data set in Enterprise ERP that has been modified during a MapLink session.
Menu 	Menu provides options specific to managing data in the active program and options for accessing related programs. If you resize a screen that includes many options, the program might refresh to provide the options in a menu format.
Notify 	Notify provides integration with Notify, which allows you to contact Enterprise ERP clients by telephone or email using predefined content. Note: This feature is only available if your organization has implemented Notify.
Output 	Output displays the Output dialog box, which features a list of available printers and print settings.
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.

Option	Description
Print 	Print sends a report directly to your default printer. Default printers are established for your user ID in the User Attributes program.
Query 	Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard allows you to create an expression based on the fields in the active program (similar to how the expression builders found in Microsoft Excel or Microsoft Access operate).
Save 	Save creates the report and saves it as a file in the Enterprise ERP spool directory. After saving the report, you can display or print it from the Saved Reports program. You can access Saved Reports by clicking Saved Reports in the Departmental Functions group of the Enterprise ERP menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
Schedule 	Schedule displays the Appointments screen, which allows you to schedule meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message that contains meeting start and end times, and a meeting 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 Microsoft Exchange calendar.
Search 	Search locates 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 further define a search.
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.
Word 	Word creates an active set of records to export to Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing. An additional feature of Microsoft Word Export is Mail Merge. This feature enables you to print professional forms, mailing labels, directories, and so on with user-defined templates.

Keyboard Shortcuts

Some actions in Enterprise ERP can be completed using the keyboard. The following table provides a description of available shortcuts.

Available Keyboard Shortcuts	
Shortcut	Action
Enter	Saves the active record.
Esc	Cancels changes to the active record.

Available Keyboard Shortcuts	
Shortcut	Action
Tab	Moves forward to the next available field; press Shift+Tab to move back to a previous field.
Space Bar	<ul style="list-style-type: none"> Clears or selects checkboxes. Displays available options in a list field. Use the up and down arrows to move through the options; press Enter to select an option.
Ctrl+U	Initiates Update mode for the current record.
Ctrl+F	Initiates the Search process.
Ctrl+D	Deletes the active record or set of records.
Ctrl+B	Provides a browse screen of the active set of records.
Ctrl+Down Arrow	Moves to the next record in an active set.
Ctrl+Up Arrow	Moves to the previous record in an active set.
Ctrl+Right Arrow	Moves to the last record in an active set.
Ctrl+Left Arrow	Moves to the first record in an active set.

Program-Specific Shortcuts

For program-specific options, the toolbar provides keyboard shortcuts. When you hover your pointer over an option, the tooltip includes the keyboard shortcut. For example, the Sort shortcut in the Vendors program is identified as (S), which is also the letter indicated on the Sort toolbar option.

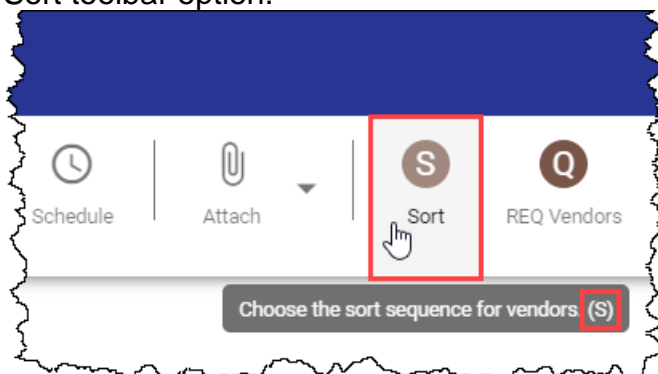
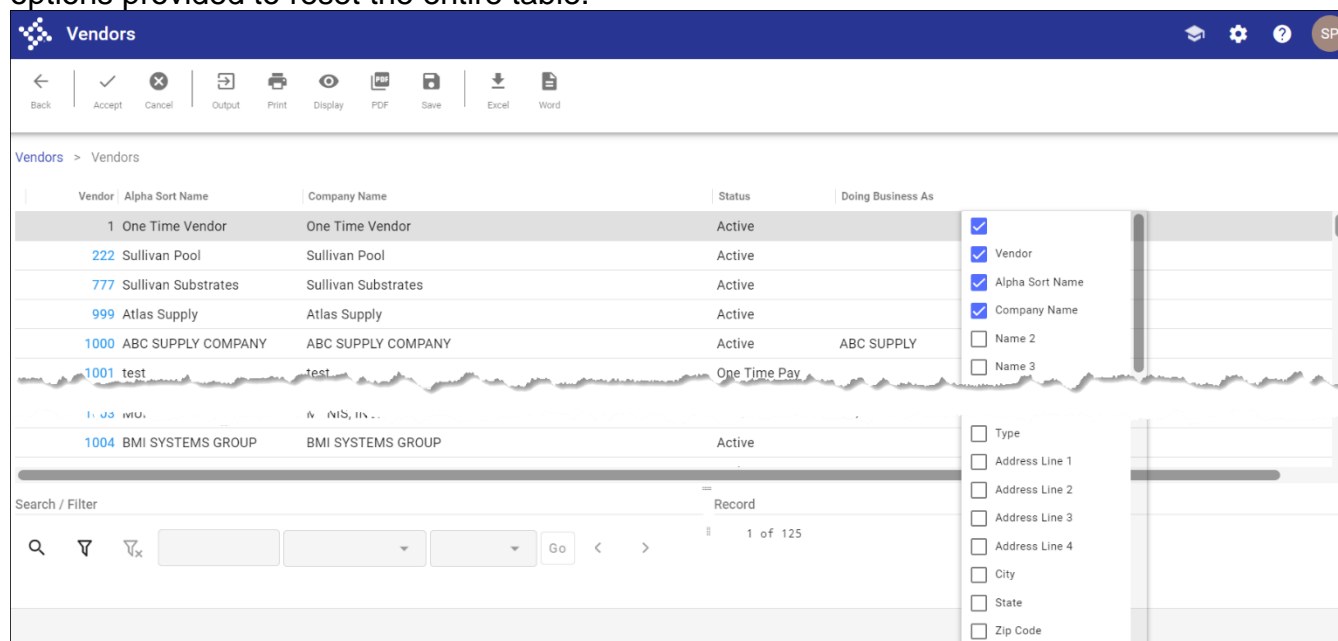


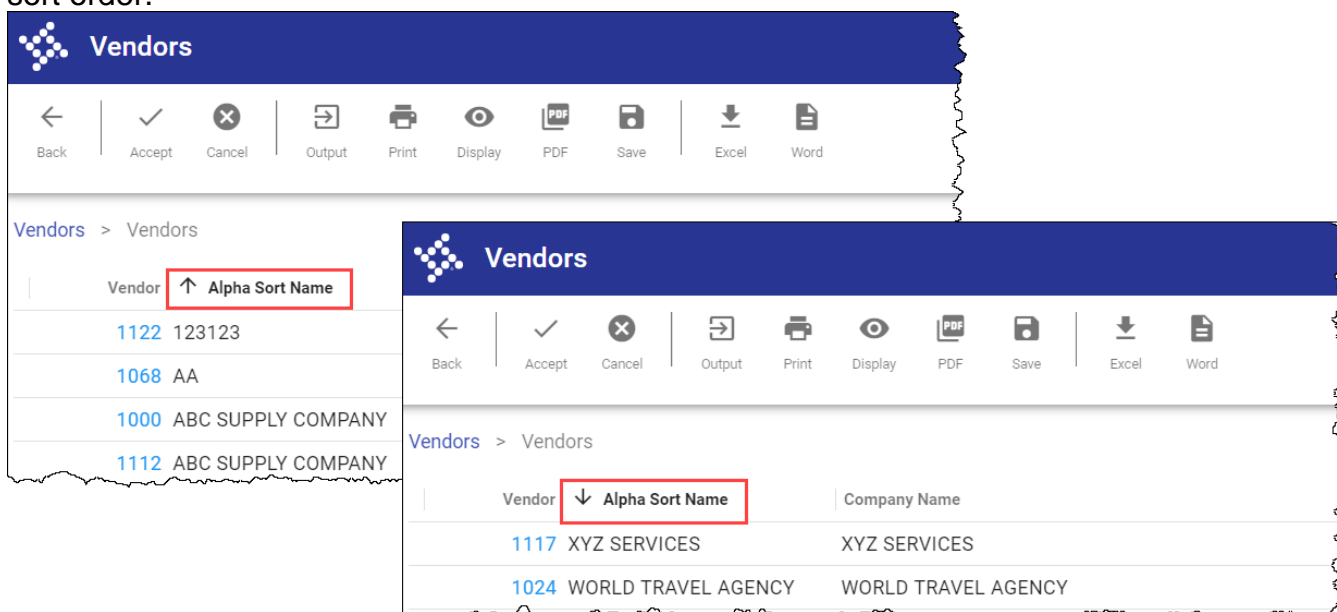
Table Headings

On browse screens and in other instances where Enterprise ERP provides information in a table format, the column headers for tables include column display and sort order options. To define the columns, right-click in the column headings row to display a list of available columns. Select or clear checkboxes to add or remove items from the display, or use the options provided to reset the entire table.

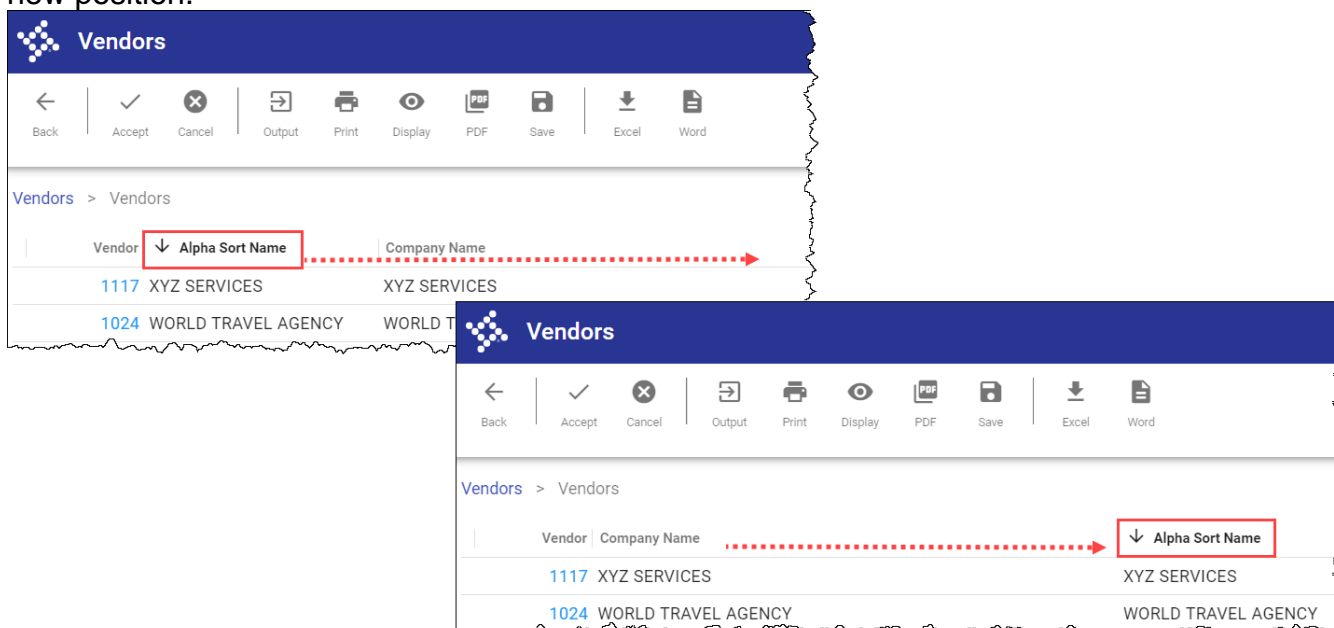


Within a table:

- To change the sort order of a column, click the column header. Enterprise ERP reorders the records and presents an up or down arrow next to the column name to indicate the sort order.



- To change the order in which the columns display, click and drag a column header to a new position.



Finding Records in Enterprise ERP

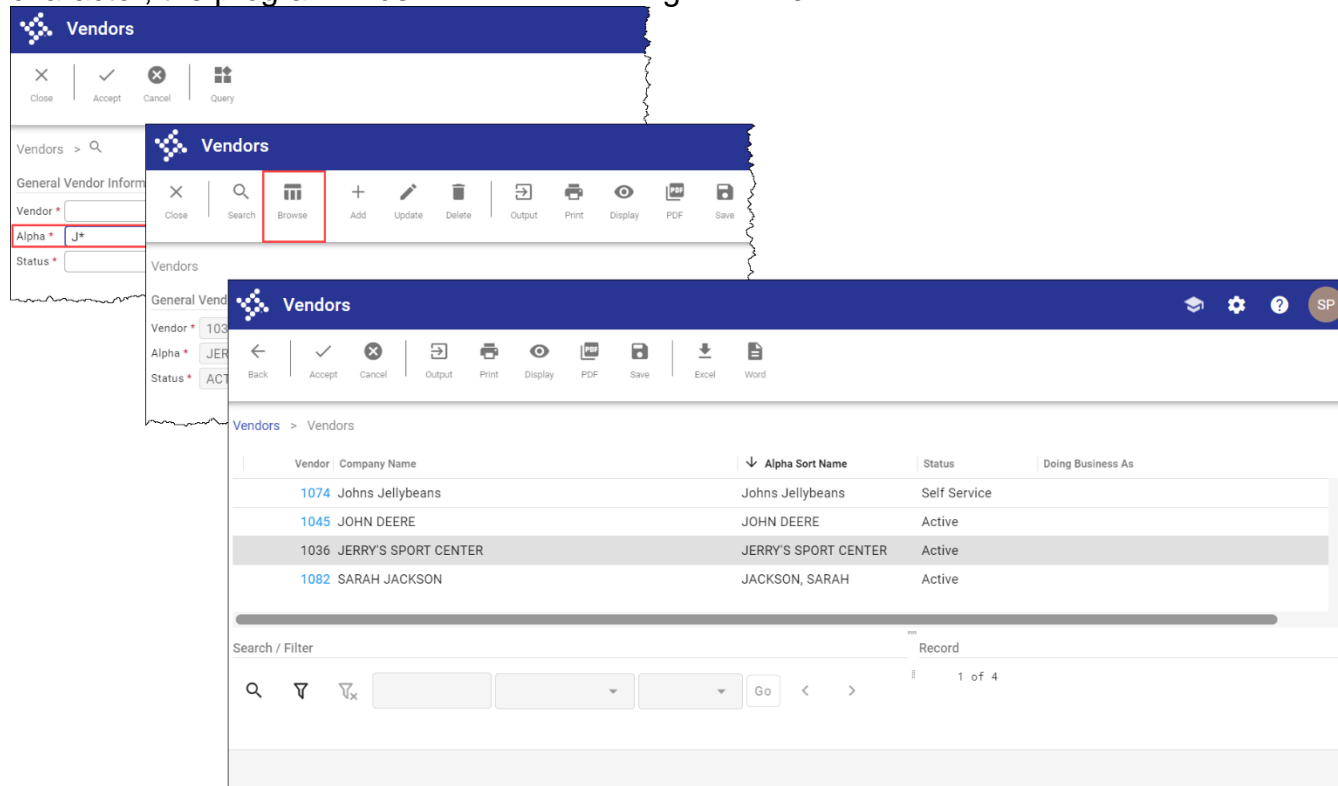
There are several ways to find existing records in Enterprise ERP programs. Most commonly, click **Search** on the toolbar, complete the available fields, and then click **Accept** to create an active set of records that match the search criteria. If you click Search, leave all the fields blank, and 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 asterisks (*).

Using Wildcard 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** on the toolbar to view a list of all results.

In programs such as the Bank Codes program, enter “*Bank*” in a 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.

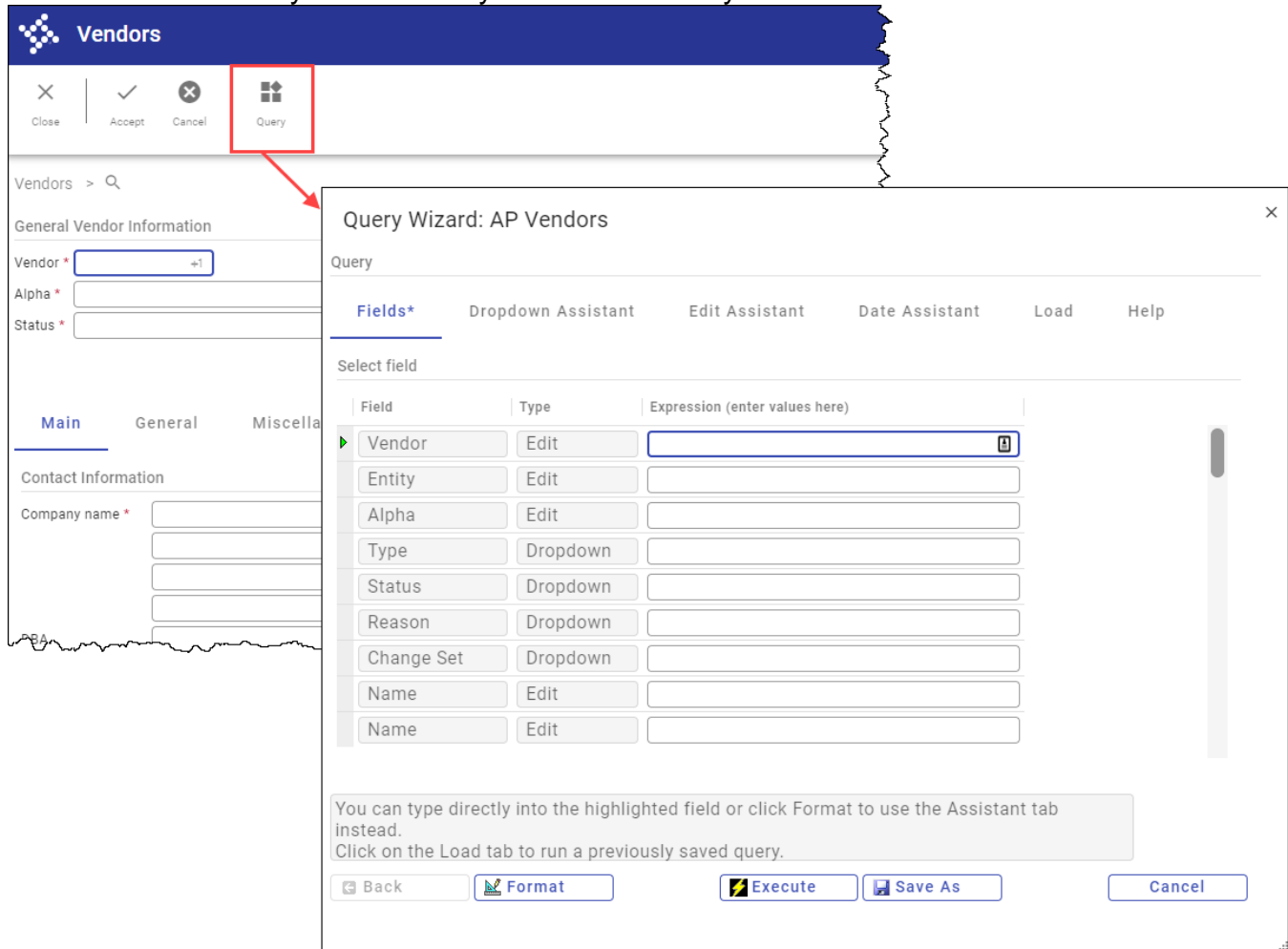
The following table provides a list of wildcard characters and their descriptions.

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 with a value of ME.
<	less than Use to find records with a value less than the data typed in the box. For example, typing <L finds data from A–K.

Symbol	Description
<=	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. 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 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 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 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 AAC, ABC, ACC, ADC, AEC, and so on.
[c]	a set of characters Use to find all codes, as follows: <ul style="list-style-type: none"> • Start with N or T: [NT]* • Start in lowercase: [a-z]* • Start in uppercase: [A-Z]* Use to find all two-character codes, as follows: <ul style="list-style-type: none"> • Start in lowercase: [a-z]? • Start in uppercase: [A-Z]?

Using Query (Advanced Search)

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 only accessible after you click Search.



Vendors

Close Accept Cancel Query

Vendors > Q

General Vendor Information

Vendor * +1

Alpha *

Status *

Main General Miscella

Contact Information

Company name *

PEA

Query Wizard: AP Vendors

Query

Fields* Dropdown Assistant Edit Assistant Date Assistant Load Help

Select field

Field	Type	Expression (enter values here)
Vendor	Edit	<input type="text"/>
Entity	Edit	<input type="text"/>
Alpha	Edit	<input type="text"/>
Type	Dropdown	<input type="text"/>
Status	Dropdown	<input type="text"/>
Reason	Dropdown	<input type="text"/>
Change Set	Dropdown	<input type="text"/>
Name	Edit	<input type="text"/>
Name	Edit	<input type="text"/>

You can type directly into the highlighted field or click Format to use the Assistant tab instead.
Click on the Load tab to run a previously saved query.

Back Format Execute Save As Cancel

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 searches, you can enter brief descriptions to help identify which queries are appropriate for future searches. When you save a query, click Accept on the toolbar 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 checkbox is not selected on the Save As screen, then only the user who created the query can access it.

To create a query:

1. Click **Search** on the toolbar.

2. Click **Query Builder**.
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 in 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 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 later, click **Save As** from the Fields tab or one of the Assistant tabs. Once you have created a query, you can view or select it using the Load tab.

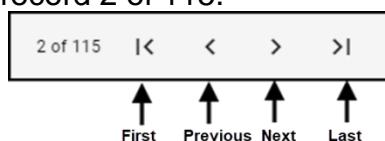
To remove an item from the Select List of Items section on the Dropdown Assistant tab, double-click the item or press **Enter** to remove the item from the list.

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 115.



To navigate the active set of records:

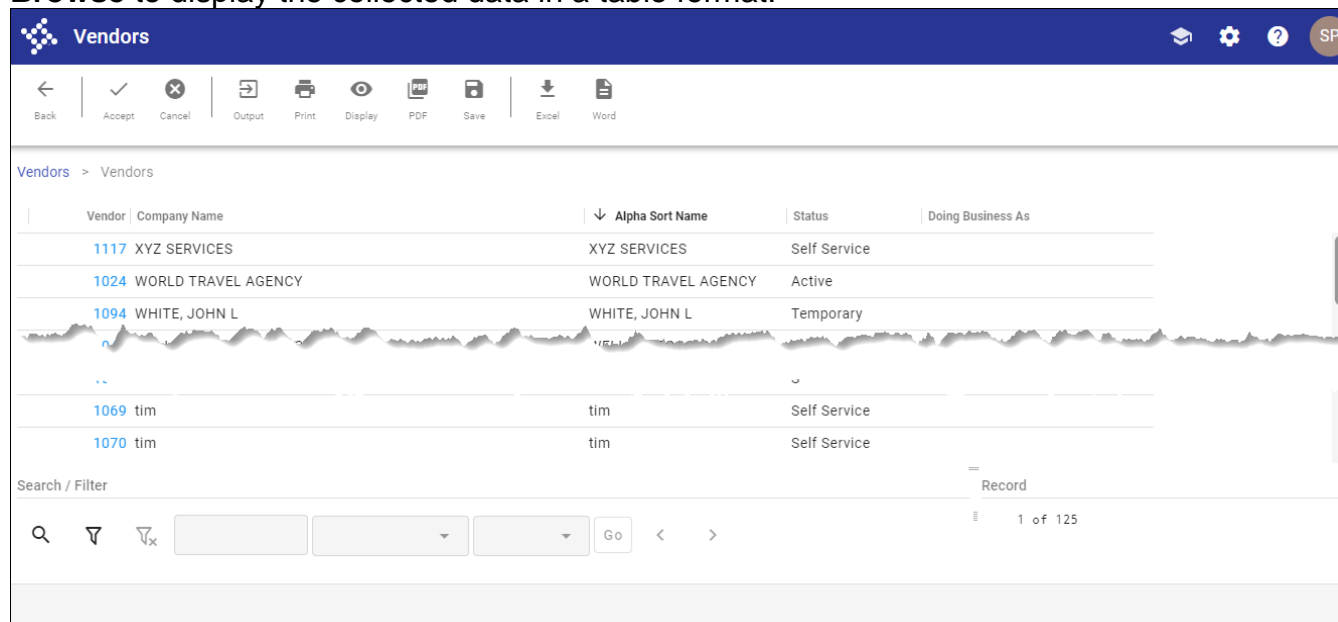
- Click **First** to view the first record in the active set (record 1).
- Click **Previous** to view record 1 of 115.

- Click **Next** to view record 3 of 115.
- Click **Last** to view the last record in the active set (record 115).

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

Browsing Records

Once you have created an active set of records within an Enterprise ERP program, click **Browse** to display the collected data in a table format.



Vendor	Company Name	Alpha Sort Name	Status	Doing Business As
1117	XYZ SERVICES	XYZ SERVICES	Self Service	
1024	WORLD TRAVEL AGENCY	WORLD TRAVEL AGENCY	Active	
1094	WHITE, JOHN L	WHITE, JOHN L	Temporary	
1069	tim	tim	Self Service	
1070	tim	tim	Self Service	

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

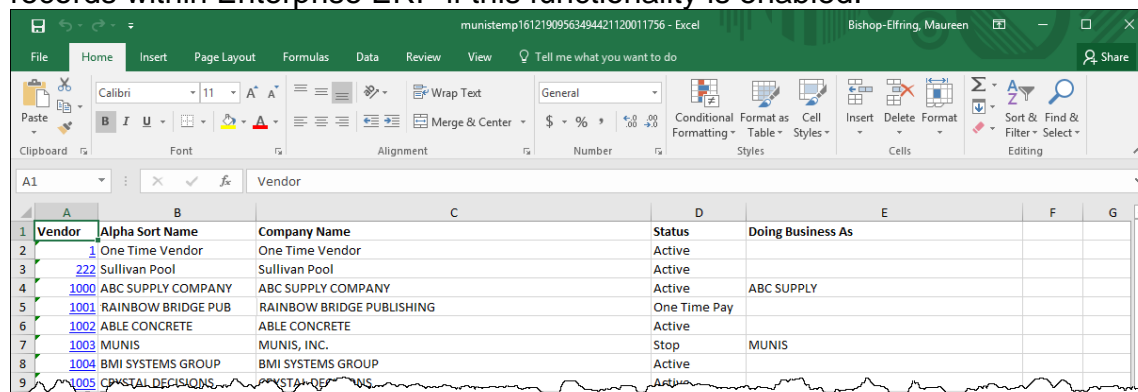
- To display or hide columns, right-click the column headings. Select the boxes to display the columns; clear the boxes to hide them. Click outside the heading list to display your selections in the revised format. When you create an output file or report from a browse screen, the program does not display hidden columns.
- 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 then click and drag the bar to the right or left.

Once you have the records selected and sorted, use the output options on the toolbar 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 hyperlinks to the

records within Enterprise ERP if this functionality is enabled.



Vendor	Alpha Sort Name	Company Name	Status	Doing Business As
1	One Time Vendor	One Time Vendor	Active	
222	Sullivan Pool	Sullivan Pool	Active	
1000	ABC SUPPLY COMPANY	ABC SUPPLY COMPANY	Active	ABC SUPPLY
1001	RAINBOW BRIDGE PUB	RAINBOW BRIDGE PUBLISHING	One Time Pay	
1002	ABLE CONCRETE	ABLE CONCRETE	Active	
1003	MUNIS	MUNIS, INC.	Stop	MUNIS
1004	BMI SYSTEMS GROUP	BMI SYSTEMS GROUP	Active	
1005	CPSTAL DECISIONS	CPSTAL DECISIONS	Active	

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 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 apply 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."

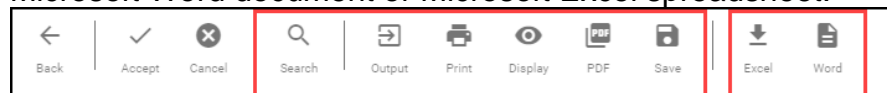
5. Click **OK** to continue.

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 might 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. You can use wildcards with numeric or date columns but doing so might lead to unpredictable results.

Reports

In many Enterprise ERP programs, you can generate a report by creating an active set of records and then using the output buttons on the toolbar to view, print, or save the report. If the Word or Excel buttons are active within a program, you can also export the report to a Microsoft Word document or Microsoft Excel spreadsheet.



When you select Display, the program provides the report in HTML format with no page breaks.

The Output button provides several output options, which vary depending on the program. If the program is integrated with Enterprise Forms, additional options are available to submit the data to the Enterprise Forms application. For more information on using Enterprise Forms with Enterprise ERP, visit the Enterprise Forms page under the Tyler group in Tyler Community.

Enterprise ERP Scheduler

From the Inquiries and Reports menus and from within many Enterprise ERP programs, you can create reports of stored data and records. The Enterprise ERP Scheduler program works with the reporting features to allow you to process reports at scheduled times.

To use Scheduler, the Enable Scheduling checkbox must be selected in the Scheduler Engine program, and Scheduler privileges must be assigned by your system administrator. To receive email alerts, a correct email address must be included in the user record.

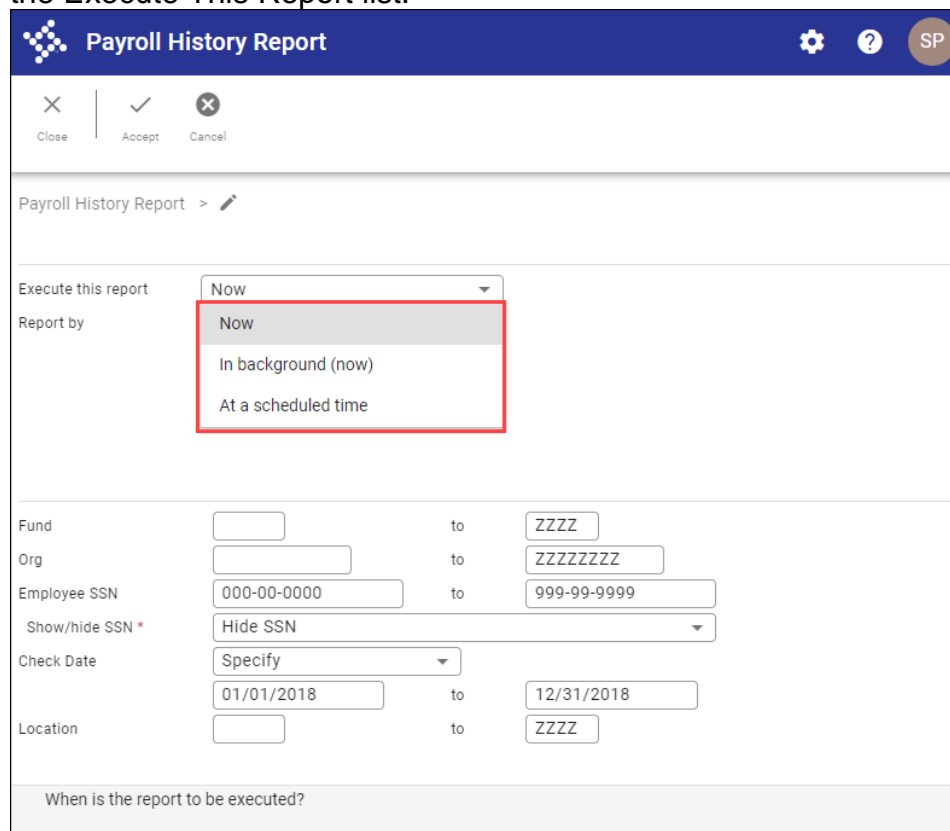
Enterprise ERP Scheduler saves a copy of the import, export, or report criteria established at the time specified for the scheduled import, export, or report. Jobs scheduled to run on the thirty-first of each month run on months with 31 days. To schedule a job to run at the end of every month, select Daily, Monthly, or similar options from the date lists in programs.

If your organization uses Content Manager, you can store reports in the Content Manager database. If you have the appropriate permissions, as well as the Tyler CM Single Document Viewer installed, you can also include a link to the document in a notification email.

Once the system administrator has enabled Scheduler privileges for you, programs that are enabled to work with Scheduler display the Execute This Report list. The Execute This Report list has three options: Now, In Background (Now), and At a Scheduled Time.

To create a report without using Scheduler, select **Now** from the Execute This Report list, and then select an output button in the toolbar to create the report in the appropriate format. To create the report using Scheduler, select **In Background (Now)** or **At a Scheduled Time** from

the Execute This Report list.



Payroll History Report

Close | Accept | Cancel

Payroll History Report > ✎

Execute this report: Now

Report by:

- Now
- In background (now)
- At a scheduled time

Fund: [] to: ZZZZ

Org: [] to: ZZZZZZZZ

Employee SSN: 000-00-0000 to: 999-99-9999

Show/hide SSN *: Hide SSN

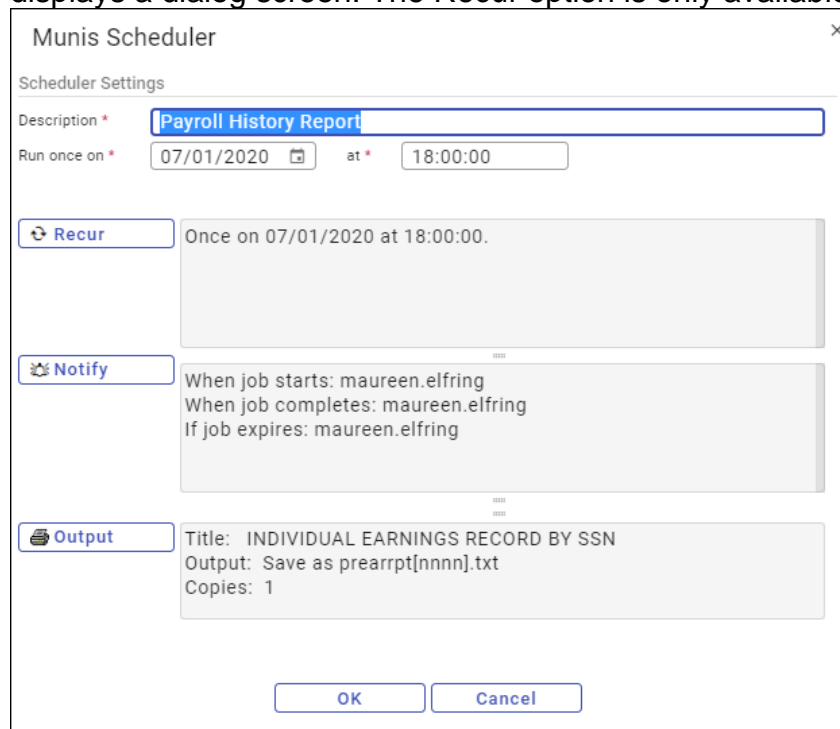
Check Date: Specify

01/01/2018 to: 12/31/2018

Location: [] to: ZZZZ

When is the report to be executed?

When you select In Background (Now) or At a Scheduled Time and click Accept, the program displays a dialog screen. The Recur option is only available if you select At a Scheduled Time.



Munis Scheduler

Scheduler Settings

Description *: Payroll History Report

Run once on *: 07/01/2020 at *: 18:00:00

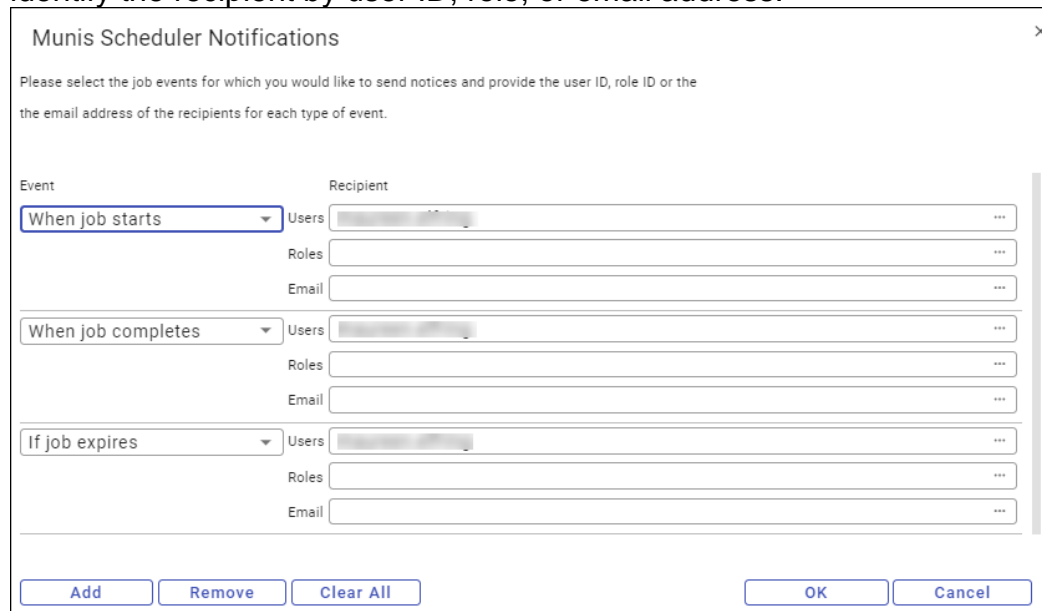
Recur Once on 07/01/2020 at 18:00:00.

Notify When job starts: maureen.elfring
When job completes: maureen.elfring
If job expires: maureen.elfring

Output Title: INDIVIDUAL EARNINGS RECORD BY SSN
Output: Save as prearrpt[nnnn].txt
Copies: 1

OK Cancel

In the Scheduler Settings fields, define the report and establish the one-time processing date and time. Click Notify to update the notification triggers and recipients for the Scheduler activities. On the Notifications screen, select the event to trigger the notification, and then identify the recipient by user ID, role, or email address.



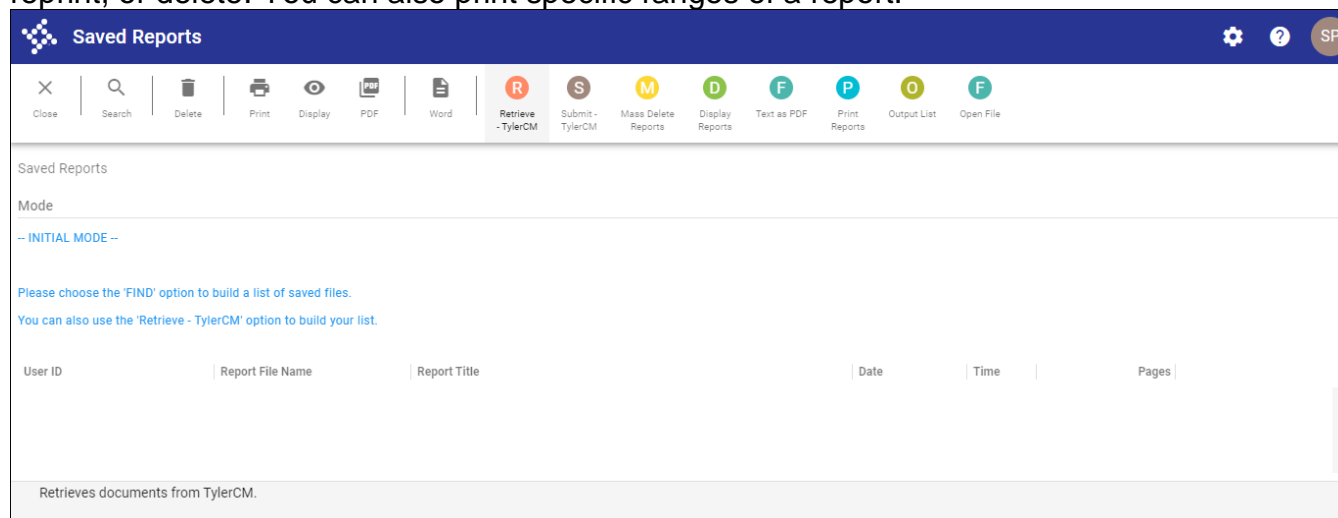
Munis Scheduler Notifications

Please select the job events for which you would like to send notices and provide the user ID, role ID or the email address of the recipients for each type of event.

Event	Recipient
When job starts	Users: <input type="text"/> Roles: <input type="text"/> Email: <input type="text"/>
When job completes	Users: <input type="text"/> Roles: <input type="text"/> Email: <input type="text"/>
If job expires	Users: <input type="text"/> Roles: <input type="text"/> Email: <input type="text"/>

Saved Reports

The Saved Reports program manages reports that have been saved, and that you can hold, reprint, or delete. You can also print specific ranges of a report.



Saved Reports

Close | Search | Delete | Print | Display | PDF | Word | Retrieve - TylerCM | Submit - TylerCM | Mass Delete Reports | Display Reports | Text as PDF | Print Reports | Output List | Open File

Saved Reports

Mode

-- INITIAL MODE --

Please choose the 'FIND' option to build a list of saved files.
You can also use the 'Retrieve - TylerCM' option to build your list.

User ID	Report File Name	Report Title	Date	Time	Pages
Retrieves documents from TylerCM.					

If your organization uses Content Manager, use the Saved Reports program to submit or retrieve documents from Content Manager. This program provides options for content submittal and retrieval for Content Manager—the Submit–TylerCM and Retrieve–TylerCM buttons, respectively—according to your organization’s configuration settings.

When you open the Saved Reports program, click **Search** to create a list of all the files available.

On the Search Results screen, click **Display Reports** on the toolbar to view a selected file or files. The report displays a Display Options box. In this box, select No Filter to view all the files, select Use Page Ranges to view only specific pages, or select Use Line Ranges to view only specific lines. Then choose the files to display. If you selected Use Page Ranges or Use Line Ranges, complete the Start and End boxes with the page or line numbers that you want to view for each file. Click **Select All** to select all the files or click **Select None** to clear all your selections.

To display PDF files, click **Text as PDF**. When the program displays a list of files, click **Select All** to select all reports in the list, or select the individual checkboxes for those reports to view. Click **Select None** to clear all the checkboxes.

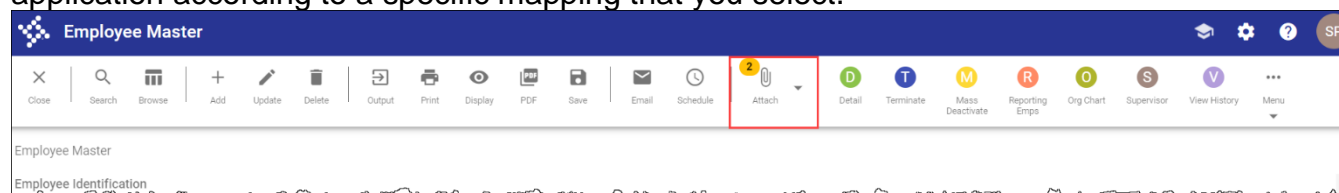
To print reports, find the report or reports to print, and then click **Print Reports**. The program provides print options; for example, you can print whole documents, specific page ranges, or specific line ranges. You can also define the number of copies to print, the format (landscape or portrait), and the printer.

Click **Select All** to select all the reports in the list or click **Select None** to clear the checkboxes.

Attach/Content Manager

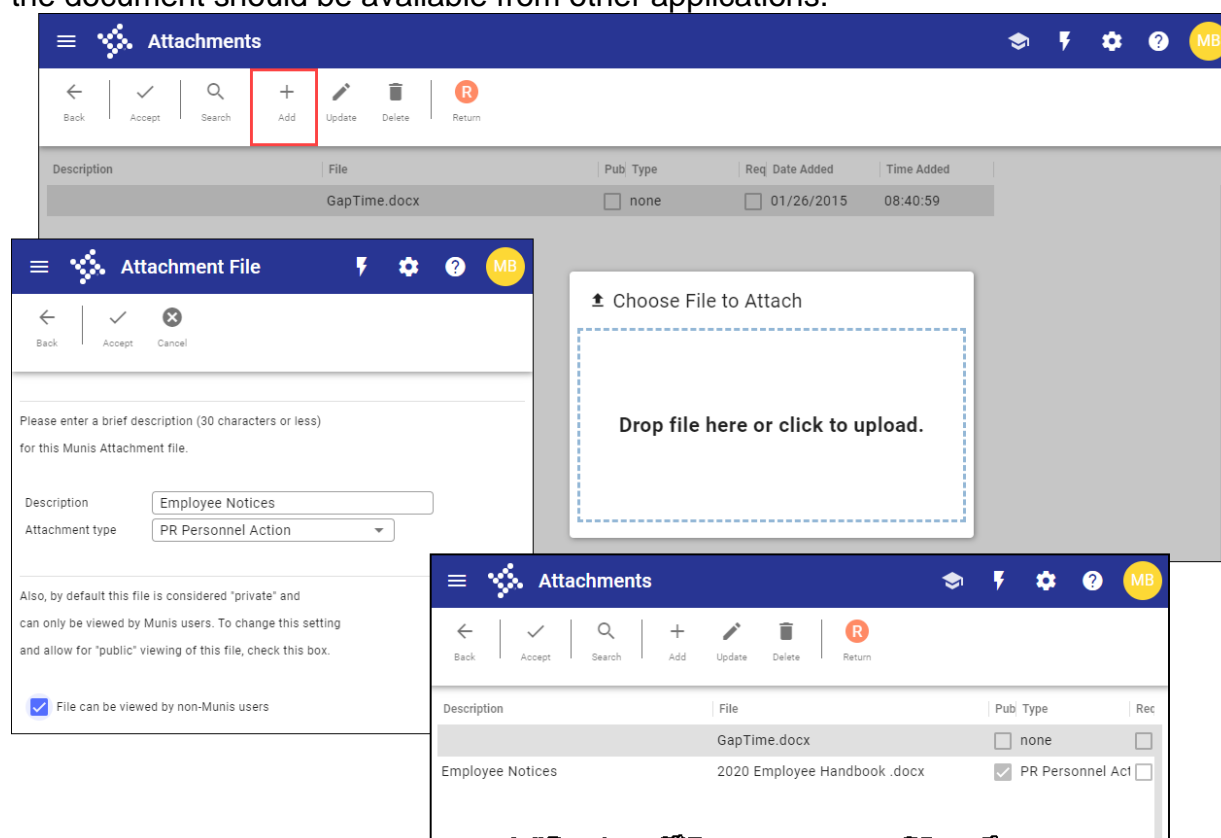
The Attach option allows you to attach documents to an Enterprise ERP record. The View Attachments and Associated Documents checkbox in the Munis System Roles program restricts access to the Attach button on the toolbar. If this checkbox is not selected, the Attach option is not available.

If your organization uses standard Enterprise ERP attachments, the documents are stored on your server; if your organization uses Content Manager, the document is stored within that application according to a specific mapping that you select.



Enterprise ERP Server

To attach a document using the standard Enterprise ERP server, click **Add** on the Attachments screen, complete the File Upload dialog box, and then navigate to the file to upload the document. Once you have selected the file, the program displays a File Attributes screen, where you enter a document title that displays on the Attachments list and determine if the document should be available from other applications.



The file name extensions for the files you can attach to programs are established in the System Miscellaneous Codes program. File names can contain up to 64 characters, including

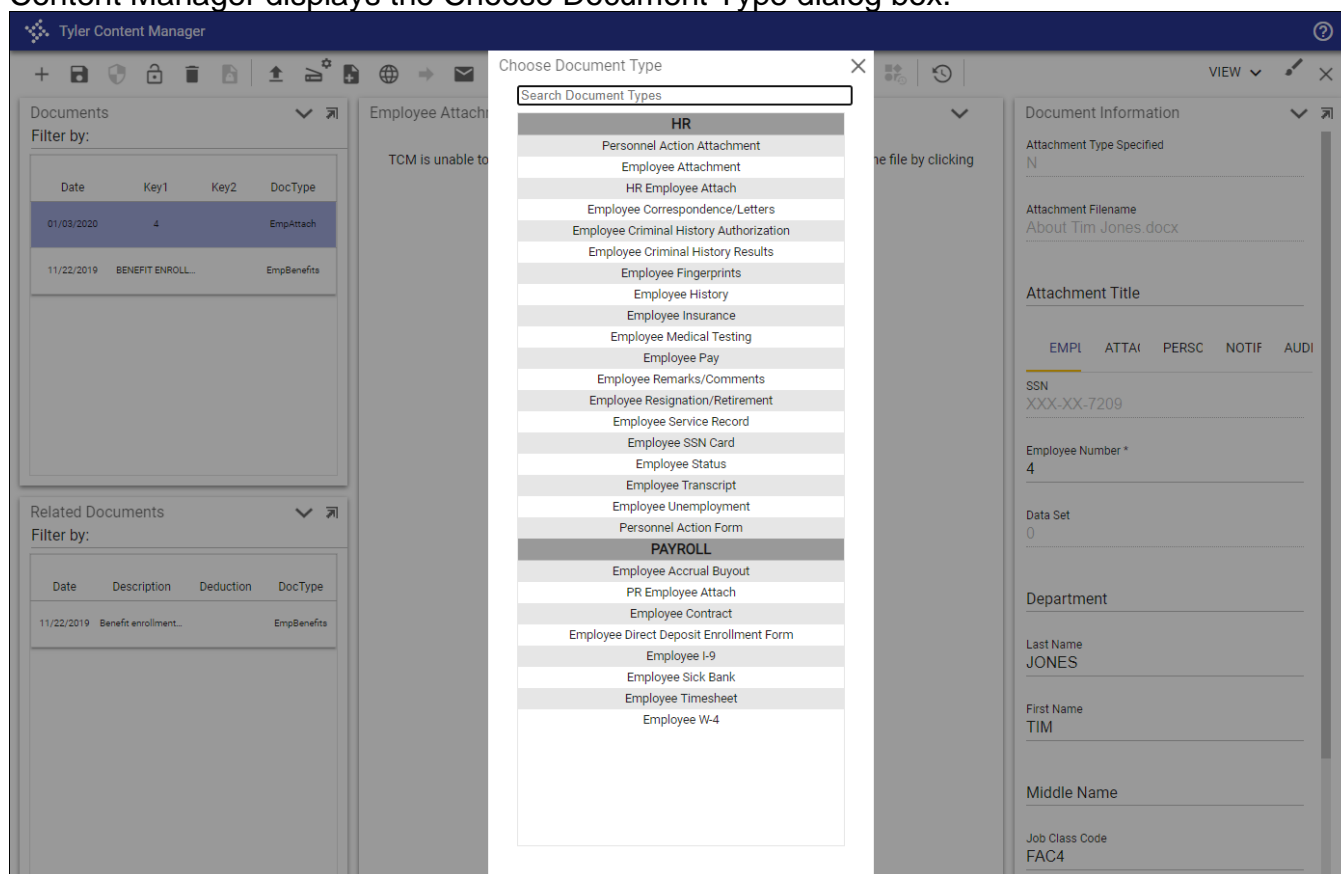
the file extension.

To remove an attachment, click **Attach** on the toolbar, highlight the document to remove from the Attachments screen, and click **Delete**. To view an attachment, click **Attach**, highlight the document to view, and click **Accept**.

Content Manager

To attach a document using Content Manager:

1. Click **Attach** on the Enterprise ERP toolbar to open Content Manager.
2. On the Content Manager toolbar click Add **+**.
Content Manager displays the Choose Document Type dialog box.



3. Select the applicable document type.
Content Manager refreshes the Document Information pane to reflect the document type selected.
4. Click Import Document **+** on the toolbar.

5. Complete the Import Document dialog box by dropping the file or navigating to the file.

Complete the Import Document dialog box by

Import Document

CHOOSE FILE

or


Drop files here...

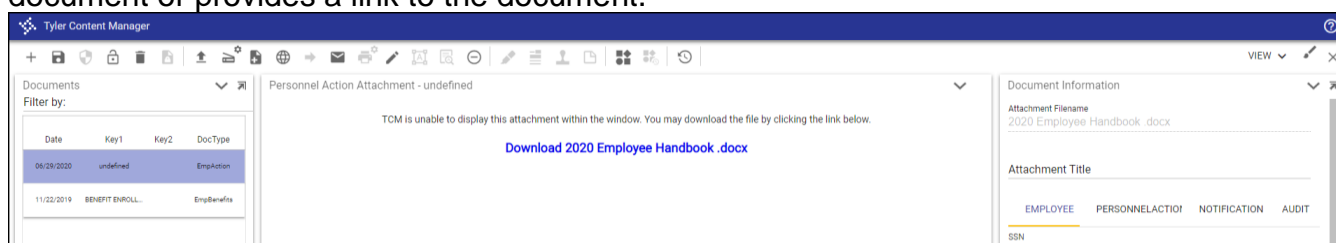
Creating single document

2020 Employee Handbook .docx (11.77 kB) X

CANCEL

IMPORT

When you click **Save**  on the Content Manager toolbar, Content Manager displays the document or provides a link to the document.



Excel and Word

The Excel and Word options export Enterprise ERP data to a Microsoft Excel spreadsheet or Microsoft Word document. To use the Word and Excel options, you must also have Microsoft Word and Microsoft Excel installed on your computer.

Excel

When you create a report within a program, or when you are completing a specific report or inquiry program, the Excel toolbar button exports collected data into Excel columns, where you can manipulate the data according to your requirements.

The Export Filter defines the values to include in the export. For example, if you create an active set of data in the Employee Deductions program and click Excel, the program displays the Export Filter with a list of all the available fields.

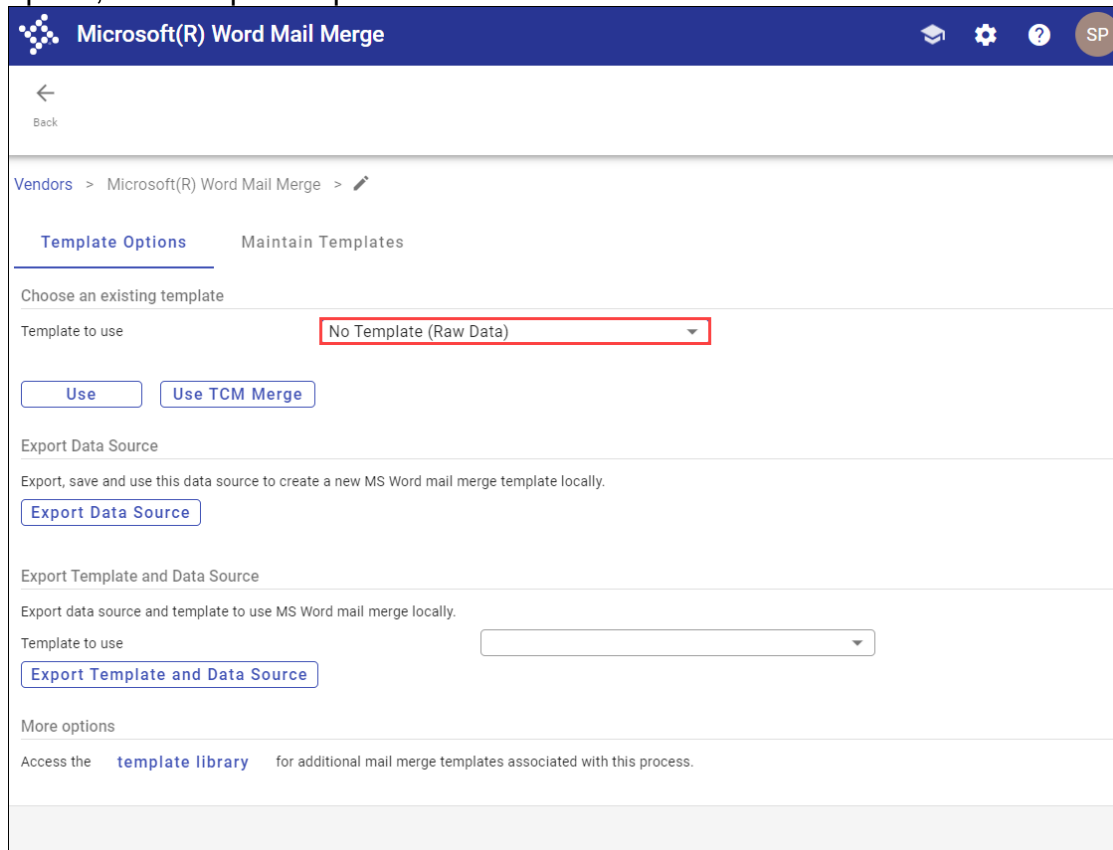
Select or clear the checkboxes for the fields to include in the export, and then click **Save and Exit** to export the files and open Microsoft Excel. The program opens Microsoft Excel with the exported records as the active file. If the Enable Hyperlinks checkbox on the Export Filter screen is selected, the file includes hyperlinks to the records in Enterprise ERP.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Employee	Last Name	First Name	Middle Initial	Status	Location	Deduction	Bank	Ins. Carrier	Ins. Carrier Desc	Ins. Plan	Ins. Plan Desc
2	4	JONES	TIM		A	177	1000					
3	4	JONES	TIM		A	177	1100					
4	4	JONES	TIM		A	177	2300		DELT	DELTA DENTAL	HMO	HMO
5	4	JONES	TIM		A	177	2700		PRUD	PRUDENTIAL	PPO	PPO
6	4	JONES	TIM		A	177	3000					
7	4	JONES	TIM		A	177	4000					
8	4	JONES	TIM		A	177	5000					
9	4	JONES	TIM		A	177	5001					
10	4	JONES	TIM		A	177	7000					
11	4	JONES	TIM		A	177	7050					
12	4	JONES	TIM		A	177	8015		PRUD	PRUDENTIAL	IND	INDIVIDUAL

If you select Excel from an Enterprise ERP browse screen, the Export Filter is not available. In this case, the program exports the selected data directly to Microsoft Excel.

Word

Word exports the active set of records into Microsoft Word Mail Merge. When Mail Merge opens, the Template Options tab is active.



The Template to Use list provides a list of available templates for reports. To export records directly into a Microsoft Word document, select No Template (Raw Data) from the list, and then click **Use**. Microsoft Word opens with the selected report as the active document. The file created during export is automatically saved in the directory where the Enterprise ERP software is installed. Click **Save As** from the File menu in Word to save the file to another directory.

The Use TCM Merge button is available when your organization uses Content Manager and a Microsoft Windows® Server. When you click this button, the program displays the Defined Mappings screen, which allows you to use a Content Manager template for the document and to archive the document to Content Manager.

The Export Data Source delivers a data file only (CSV) file to the client PC. When you select this option, the browser offers to open the file after its receipt. If you choose this option, the file opens in Microsoft Excel; however, the intended use of the feature is that after downloading, you open Microsoft Word to start a mail merge, pointing to the data file as your source.

The Export Template and Data Source group provides the Template to Use option and the Export Template and Data Source button. When you select a template and then click the Export Template and Data Source button, the program creates a .ZIP file that contains the

Word template document and an Excel file of the data in .CSV format. This allows you to modify the template on your local PC and complete the mail merge process from that location.

On the Maintain Templates tab, you can add, update, or delete templates available for use in a program. When you add or update a template, you can establish use and maintenance restriction levels.

Template Use Restrictions

Each template has user restriction features that allow you to define who can use and maintain it. There are four types of user restrictions that you might choose in the Use and Maintain lists:

- **Owner**—Only the owner or creator of the template can use or maintain the template. The owner is determined by the user who originally added the template to Enterprise ERP and cannot be changed. To change the owner, you must delete the template and the new owner must add it. If the current user's logon credentials do not match the owner's, then access to the template is denied.
- **User**—Only specific users can use or maintain the template. This list is maintained manually on a template-by-template basis. Users' logon credentials are checked against this list to verify that they are authorized to use the template.
- **Department**—Only specific departments can use or maintain the template. This list is maintained manually on a template-by-template basis. Users' departments, as defined by the system administrator, are checked against the list of departments to verify that they are authorized to use the template.
- **Public**—Anyone can use or maintain this template.