



MUNIS END USER GUIDE

BIDS AND CONTRACTS










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Legend of Munis Buttons





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	
 Accept	Accept saves information after you create or update a record. This button is often highlighted when adding, updating, or searching for records.
 Cancel	Cancel ends an operation, such as adding or updating a record.
Search	
 Search	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 further define a search.
 Browse	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 screen. On a browse screen, the Excel button exports the data directly to a Microsoft® Excel spreadsheet.





Button	Description
 <p data-bbox="321 594 456 621">Query Builder</p>	<p data-bbox="631 548 1071 848">Query Builder 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 Builder, the Query Wizard screen (similar to the expression builders found in Microsoft Excel or Microsoft Access) provides options for creating an expression based on the fields in the active program.</p>
Actions	
 <p data-bbox="367 995 409 1022">Add</p>	<p data-bbox="631 953 1071 1304">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 Tab 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.</p>
 <p data-bbox="350 1423 422 1451">Update</p>	<p data-bbox="631 1377 1071 1623">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.</p>

Button	Description
 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.
 Global	Global provides the option for updating or deleting multiple records at one time. Click the down arrow to access the global options available in the active program.
 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.
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.
 Text File	Text File saves 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.

Button	Description
 <p>PDF</p>	<p>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.</p>
 <p>Preview</p>	<p>Preview immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.</p>
Office	
 <p>Excel</p>	<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 the Microsoft Excel application. • 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 Munis records.</p> <p>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.</p>

Button	Description
 <p>Word</p>	<p>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.</p>
 <p>Email</p>	<p>Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, Tyler Dashboard opens, and in turn opens the Munis program with the linked record as the current record.</p> <p>Note: This feature requires that the Tyler Dashboard be enabled.</p>
 <p>Schedule</p>	<p>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 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.</p>
Tools	
 <p>Attach</p>	<p>Attach allows you to view, add, or delete documentation related to the current record.</p> <ul style="list-style-type: none"> 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.

Button	Description
	<ul style="list-style-type: none"> 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. <p>Note: This option is accessible only if the View Attachments and Associated Documents 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.</p>
 <p>Notes</p>	<p>Notes 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.</p>
 <p>Notify</p>	<p>Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone, email, or text message using predefined content.</p> <p>Note: This feature is only available if your organization has installed and implemented Tyler Notify.</p>
 <p>Audit</p>	<p>Audit provides the audit history for the selected record.</p>

Button	Description
 <p data-bbox="344 632 431 657">MapLink</p>	<p data-bbox="631 583 1073 804">MapLink provides integration of map data sources with Munis programs. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session. Click the down arrow for MapLink options.</p>
 <p data-bbox="358 919 420 945">Alerts</p>	<p data-bbox="631 869 1073 1125">Alerts allows you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute emails at specified dates as a reminder of upcoming events or activities that require attention. Reminder alerts are established using the Alert Administration programs on the System Administration menu. The Alert programs are not available for use with all Munis programs. Click the down arrow to manage alerts.</p>
Menu	
 <p data-bbox="358 1272 420 1297">More</p>	<p data-bbox="631 1222 1073 1373">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.</p>
Return	
 <p data-bbox="354 1535 430 1560">Return</p>	<p data-bbox="631 1474 1073 1556">Return closes the current screen and returns you to the previous screen of the active program.</p>

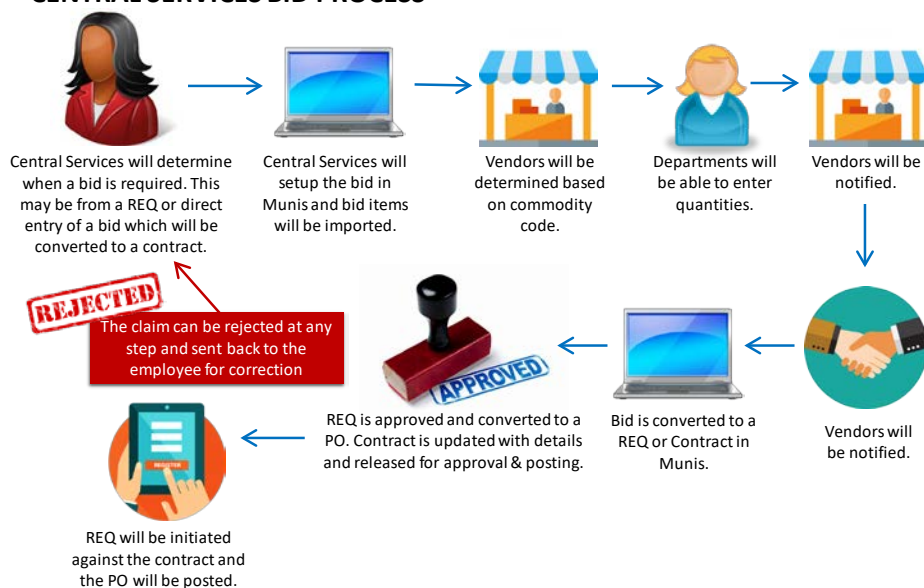
Bids

Within this section, you will learn:

- ✓ How to enter your requested quantities on a bid.
- ✓ How to evaluate/score vendor bids that affect your department.

Bid Process

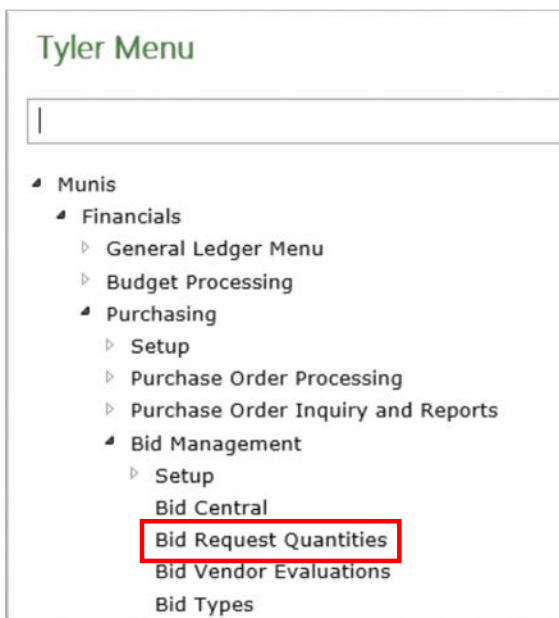
CENTRAL SERVICES BID PROCESS



How to Enter Requested Quantities on a Bid

In a decentralized ordering scenario, buyers from disparate departments may all be contributing to the total bid quantities. As a result, you will occasionally need to fill out the requested quantities for your department on a bid. For example, if Central Services is going to issue a bid to buy goods that will be needed by multiple departments, then knowing each department's quantity will help Central Service summarize the total of how many are needed organization-wide.

1. From the **Tyler Menu**, click **Financials>Purchasing>Bid Management>Bid Request Quantities**.



2. The system will display every bid for which you are authorized to submit the requested quantities (including bids that are past the request date and that can no longer be requested against). Bids may also be displayed multiple times, if you responsible for multiple departments.

The image shows a screenshot of the 'Bid Request Quantities' application window. The window title is 'Bid Request Quantities' and it says 'Welcome, Iris McGee'. Below the title bar, there is a 'Tools' section with a 'Report' icon. The main content area displays a table of bids with the following columns: Bid, Description, Buyer, Request By, Department, Has Requests, Request Status, and Refuse. A 'Department Filter' panel is open on the right side of the table, showing checkboxes for various departments.

Bid	Description	Buyer	Request By	Department	Has Requests	Request Status	Refuse
> 18012	BID DESCRIPTION - PLEASE SEE THE...	Patricia Jones	2/28/2018	(4000) TRANSPORTA	<input type="checkbox"/>	No Requests	Refuse
> 18012	BID DESCRIPTION - PLEASE SEE THE...	Patricia Jones	2/28/2018	(5100) PARKS REC	<input type="checkbox"/>	No Requests	Refuse
> 18002	Confidential Shredding Service	Angela Glover		(1500) CENTRAL SV	<input checked="" type="checkbox"/>	Complete	
> 18003	Catering Services for Senior Services	William Harrison	2/19/2018	(5300) SENIOR SER	<input type="checkbox"/>	No Requests	Refuse

The Department Filter panel on the right shows the following options:

- (4000) TRANSPORTA
- (5100) PARKS REC
- (1500) CENTRAL SV
- (5300) SENIOR SER

3. Use the check boxes in the **Department Filter** group to display or hide bids based on the department code.

Department Filter

(4000) TRANSPORTA

(5100) PARKS REC

(1500) CENTRAL SV

(5300) SENIOR SER

- Once you have applied the Department Filter, use the scroll bar at the bottom to scroll to the far right of the screen. Click on the **Request Items** link for the bid that you would like to request items on.

4 bids are available for ordering <small>(some bids may be listed more than once if you have permission to order for multiple departments)</small>						
	Buyer	Request By	Department	Has Requests	Request Status	
SEE THE...	Patricia Jones	2/28/2018	(4000) TRANSPORTA	<input type="checkbox"/>	No Requests	Refuse Past request by date. Contact buyer.
SEE THE...	Patricia Jones	2/28/2018	(5100) PARKS REC	<input type="checkbox"/>	No Requests	Refuse Past request by date. Contact buyer.
ce	Angela Glover		(1500) CENTRAL SV	<input checked="" type="checkbox"/>	Complete	Request Items
Services	William Harrison	2/19/2018	(5300) SENIOR SER	<input type="checkbox"/>	No Requests	Refuse Past request by date. Contact buyer.

- The system will display the bid at a summary (Group) level. Click on the blue wording to expand the selection to show the detailed line items.




Excel
Export



Show
Options



Import



Return
To Search



Office
Menu

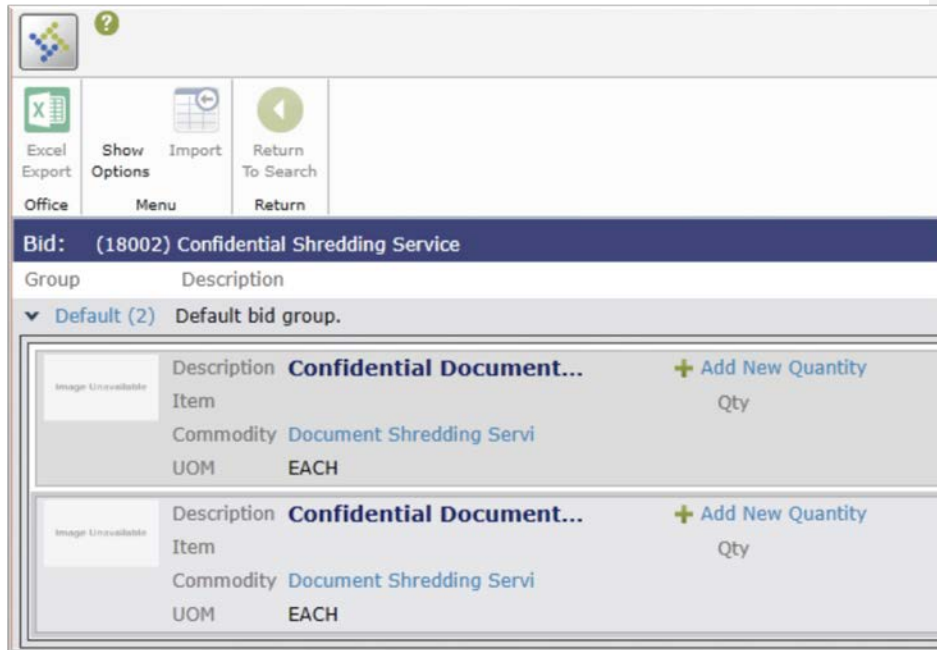


Return

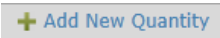
Bid: (18002) Confidential Shredding Service

Group	Description
> Default (2)	Default bid group.

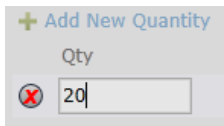
- The system will display the line items.



7. Click on **Add New Quantity** for the line item that you'd like to request quantities on.



8. The **Qty** box will allow you to enter your requested quantities.

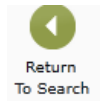


9. Repeat steps 7 and 8 for any other line items that you would like to order quantities on.

10. When you are done entering your requested quantities on the bid, click the **Save** button.



11. Click the **Return to Search** button on the ribbon to return to the main Bid Request Quantity screen.



12. The Bid Request Quantities screen will now display updated information, including the **Has Requests** check box, and the **Request Status** column. Statuses may include Refuse, Complete and Pending.

4 bids are available for ordering <small>(some bids may be listed more than once if you have permission to order for multiple departments)</small>							
Bid	Description	Buyer	Request By	Department	Has Requests	Request Status	
> 18012	BID DESCRIPTION - PLEASE SEE THE...	Patricia Jones	2/28/2018	(4000) TRANSPORTA	<input type="checkbox"/>	No Requests	Refuse
> 18012	BID DESCRIPTION - PLEASE SEE THE...	Patricia Jones	2/28/2018	(5100) PARKS REC	<input type="checkbox"/>	No Requests	Refuse
▼ 18002	Confidential Shredding Service	Angela Glover		(1500) CENTRAL SV	<input checked="" type="checkbox"/>	Pending	Mark as
Detail			Ship To	UOM	Quantity		
Confidential Document Shredding Services - IT Dept 96 Gallon Containers				EACH	20.00		
> 18003	Catering Services for Senior Services	William Harrison	2/19/2018	(5300) SENIOR SER	<input type="checkbox"/>	No Requests	Refuse

13. If the status is pending, you can click on **Mark as Complete**. This will complete the process of entering bid quantities process for your department.

Has Requests	Request Status	
<input type="checkbox"/>	No Requests	Refuse
<input type="checkbox"/>	No Requests	Refuse
<input checked="" type="checkbox"/>	Pending	Mark as Complete
<input type="checkbox"/>	No Requests	Refuse

14. The bid quantity request will be marked as complete.

Request Status	
No Requests	Refuse
No Requests	Refuse
Complete	
No Requests	Refuse

Information About Posting Bids and Vendor Proposals

When the bid ordering due date has passed for the bid record, or when all departments have submitted or refused requested quantities, the bid will be manually advanced to the Accepting Proposals stage of bid ordering.

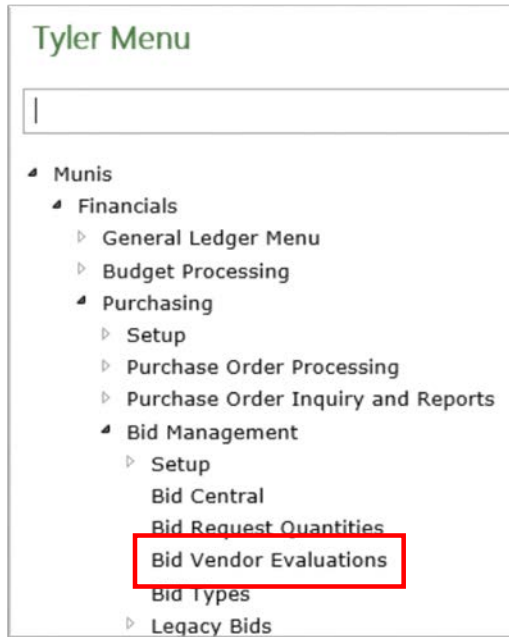
Once the bids are posted on C-VAP (Clayton Vendor Access Portal), vendors whose commodity codes match the bid can submit their proposals accordingly.

How to Evaluate Vendor Bids

The Bid Vendor Evaluations function in the system provides tools for the bid evaluators to enter their scores during the evaluations process. Bid questions and evaluators are assigned by Central Services in advance.

1. To view the Bid Vendor Evaluations screen, from the Tyler Menu, go to **Munis > Financials > Purchasing > Bid Management > Bid Vendor Evaluations**

Commented [IM1]: I could not validate these steps because I don't have a bid to evaluate (mine shows zero available). But I did get some screenshots from a manual.



2. The Bid Vendor Evaluations screen will display only the bids for which you have been assigned as an evaluator. If you have not been assigned as a bid evaluator, or you do not have any responses awaiting evaluation, the screen will show zero bids available for scoring.

Available Bids

Bid Vendor Evaluations

Welcome, Scott Nutting

1 bid is available for scoring

(3055) Natural Science Supplies Procurement
Score

Total Evaluation Questions 4
Vendors needing evaluation 3 of 4

Vendor Evaluation Details

Evaluator **Scott Nutting**
E-mail address **scott.nutting@tylertech.com**
Assigned Questions 0

Vendor	Unscored Responses	Released	
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	1	<input type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

Evaluator **Jane Smith**
E-mail address **jane.smith@tylertech.com**
Assigned Questions 0

Vendor	Unscored Responses	Released	
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	0	<input checked="" type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

3. For any bid that is displayed, you will be able to enter a bid score. Click the **Score** option in the upper right-hand corner to make the vendor responses available for your entry. Alternatively, click the Vendor Evaluation Details button to display a list of vendors that have submitted a proposal for the bid.

Bid Vendor Evaluations
Welcome, Scott Nutting

Available Bids

1 bid is available for scoring

(3055) Natural Science Supplies Procurement [Score](#)

Total Evaluation Questions 4 Vendors needing evaluation 3 of 4

Vendor Evaluation Details

Evaluator **Scott Nutting** E-mail address scott.nutting@tylertech.com Assigned Questions 0

Vendor	Unscored Responses	Released	
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	1	<input type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

Evaluator **Jane Smith** E-mail address jane.smith@tylertech.com Assigned Questions 0

Vendor	Unscored Responses	Released	
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	0	<input checked="" type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

4. Click Score for a specific vendor to evaluate only the responses from that vendor.

The screenshot shows the 'Bid Vendor Evaluations' interface. At the top, it says 'Available Bids' and 'Welcome, Scott Nutting'. A notification bar indicates '1 bid is available for scoring'. The main section is for bid '(3055) Natural Science Supplies Procurement' with a 'Score' link. It shows 'Total Evaluation Questions 4' and 'Vendors needing evaluation 3 of 4'. There are two sections for 'Vendor Evaluation Details'.

Evaluator: Scott Nutting (E-mail address: scott.nutting@tylertech.com, Assigned Questions: 0)

Vendor	Unscored Responses	Released	Score
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	1	<input type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

Evaluator: Jane Smith (E-mail address: jane.smith@tylertech.com, Assigned Questions: 0)

Vendor	Unscored Responses	Released	Score
Carolina Biological Supply Company	0	<input checked="" type="checkbox"/>	Score
Flinn Scientific Inc	0	<input checked="" type="checkbox"/>	Score
Ward's Science	0	<input checked="" type="checkbox"/>	Score
eNasco	0	<input checked="" type="checkbox"/>	Score

5. The system will display the Score Vendor Evaluation Answers screen.

The screenshot shows the 'Score Vendor Evaluation Answers' screen. It includes a 'Return To Available Bids' button and a dropdown for 'Evaluator' set to 'Scott Nutting - (scott.nutting@tylertech.com)'. The main area is titled 'Evaluation Question and Responses' and contains a table with columns for Question, Response, Comment, Score, Released, and Evaluator Notes.

Question	Response	Comment	Score	Released	Evaluator Notes
Please provide a summary of the warranties offered for each of the items in your bid.	Return items for any reason for 30 days, 90 day warranty against manufacturer defects.		5 of 5	<input checked="" type="checkbox"/>	Best warranty offered by any vendor.
Do all of the products included in your bid meet or exceed the exact specification described?	Yes, all items are exactly to specification.		of 30	<input type="checkbox"/>	

Buttons for 'Save' and 'Cancel' are at the bottom right.

6. If you are entering the evaluation scores as a proxy user, select the **Evaluator** that you are representing from the list.

Evaluator Scott Nutting - (scott.nutting@tylertech.com)

- From the **Select Vendors** list, click the first vendor for which you will enter scores. The screen will be refreshed to display the vendor's response to the bid questions.



- Enter a **Score** and any **Evaluator Notes** in the boxes. The bid questions developed by Central Services may be True/False or open text. Score values have also been pre-defined.

Question	Response	Comm	Score	Release	Evaluator Notes
<p>1 Please provide a summary of the warranties offered for each of the items in your bid.</p>	<p>Return items for any reason for 30 days, 90 day warranty against manufacturer defects.</p>		5 of 5	<input checked="" type="checkbox"/>	Best warranty offered by any vendor.
<p>2 Do all of the products included in your bid meet or exceed the exact specification described?</p>	<p>Yes, all items are exactly to specification.</p>		of 30	<input type="checkbox"/>	

- When you have scored all vendor responses, click **Save**.
- Click on a different vendor from the **Select Vendor** list. Continue to enter vendor response scores for all the vendors on the bid.



11. When you have finished scoring, click **Return to Available Bids**.



Contracts

Within this section, you will learn:

- ✓ The difference between contract enforcement methods.
- ✓ How to use Contract Central to view your department's contracts.

Contract functions will be performed primarily by Central Services. However, end users will need to know some basic information on how the system tracks and maintains contracts. Furthermore, end users will also need to learn how to inquire and run contract reports.

Contracts will have associated purchase orders and invoices. To learn how to create a requisition against an existing contract, please attend the Requisition class and review the appropriate training documentation.

Contract Enforcement Methods

In Munis, there are eight different ways to enforce a contract. At Clayton County, we will use only four out of the eight methods, but descriptions are provided for all eight enforcement methods.

Enforcement method descriptions

1. Encumbered Accounts
2. Non-Encumbered Accounts
3. Amounts by Segments
4. Not to Exceed
5. Limitless
6. Items w/ Encumbered Accts
7. Items w/ Non-Encumbered Accts
8. Items w/ Account Segments

Method 1 – Encumbered Accounts

This is one of the methods that will be frequently used by the County.

An **Encumbered Accounts** contract is used when you know the full amount of the contract at contract execution, including all general ledger account(s) that the contract will be charged to and the specific total for each account. The system will encumber the exact amounts against the general ledger accounts. In other words, it will reserve these amounts against your available

budget. Once a contract is created, requisitions, purchase orders, and invoices can be entered to track all activities, including vendor progress, and vendor payments. It is important to note that additional encumbrances will not take place when requisitions or purchase orders are entered against the contract, because funds have already been reserved when the contract was initially created.

Method 2 – Non-Encumbered Accounts

This is another method that will be used by the County.

Contracts that use the **Non-Encumbered Accounts** enforcement method do not record encumbered amounts against the project account strings or general ledger accounts at the time the contract is created in Munis. The project account strings and general ledger accounts of the contract are known at contract creation, and they must be entered on the Accounts tab of Contract Entry before the contract record can be completed.

Funds are encumbered when individual purchase orders are created against the contract.

This type of contract can cross fiscal years. At year end, any open purchase order against the contract will be carried forward to the next fiscal year. Munis has the ability to distinguish carried forward encumbrances and current year encumbrances. In other words, if the purchase order against this contract has already been encumbered in fiscal year 2017/2018, it will not be encumbered again in fiscal year 2018/19. Budget checking only occurs once.

Method 3 – Amounts by Segments

This type of contract will not be used by the County. Should the need arise in the future, Central Services will re-define the processes.

Contracts that use the **Amounts by Segments** enforcement method do not record encumbered amounts against project account strings or general ledger accounts at the time the contract is entered into the system.

The total contract amount, project strings, and account segments (please refer to the General Ledger/Budget user manual for a full description of account segments) can cross fiscal years. The selected project strings, account segments and contract amount can be modified from year to year. Encumbrances will be created when a requisition is created against the contract. All requisitions, purchase orders and invoices against the contract must use the same project string and general ledger accounts as established on the contract.

Method 4 – Not to Exceed

This is another method that will be used by the County.

Contracts that use the **Not to Exceed** enforcement method do not require general ledger accounts or project strings at the time the contract is created in the system. Only a total contract amount is required.

This type of contract can cross fiscal years. No encumbrance is generated until a transaction is posted against the contract. The system checks the contract budget as each transaction is being posted.

Method 5 – Limitless Contracts

This is another method that will be used by the County.

When you enter a limitless contract, current year (CY) and next year (NY) amount lines are automatically created by the system with all amounts equal to zero (0). You are not able to maintain the amount lines for a limitless contract. The amount line records provide a means to track activity against the contract (for example, requisitions, purchase orders, invoices, and carryforward amounts) only. Items (Contract or Item File) can be specified on this contract as well just as any other method.

Transactions entered against a limitless contract impact the project ledger and the general ledger, as applicable. Contract budget checks are not performed as there is no budget for the contract.

Important! Original implementation of a limitless contract (that is, method is Not To Exceed) with a zero-dollar amount are no longer allowed. If such contracts exist in your system, contact Munis Technical Support for assistance in with updates to allow your contracts to be used.

Method 6 – Items with Encumbered Amounts

Contracts that use the **Items with Encumbered Accounts** enforcement method require entry of project account strings or general ledger accounts in addition to contract line item amounts. The entered project strings or general ledger accounts are encumbered for the entered amounts at the time the contract is created. Transactions against the contract are restricted to the entered accounts, and cannot exceed the contract amounts for the current fiscal year.

Method 7 – Items with Non-Encumbered Accounts

Contracts that use the **Items with Non-encumbered Accounts** enforcement method require entry of project account strings or general ledger accounts in addition to contract line item amounts. The entered project strings or general ledger accounts are not encumbered for the entered amounts at the time the contract is created. Transactions against the contract are restricted to the entered accounts, and cannot exceed the contract amounts for the current fiscal year.

Method 8 – Items with Account Segments

Contracts that use the **Items with Account Segments** enforcement method require entry of contract line item amounts, as well as project account strings or general ledger account segments.

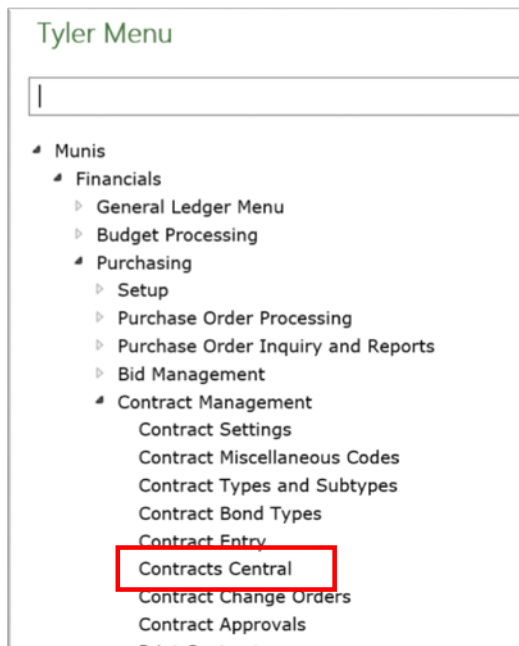
This enforcement method does not record encumbered amounts against project account strings or general ledger accounts at the time the contract is entered into the Munis system. The accounts entered on a transaction record must match the strings or segments on the contract record. The total transaction amounts cannot exceed the contract amount for the current fiscal year.

Contract Central

As an end user, you will be able to use the Contracts Central function in Munis to inquire on contract records and information. You will not have access to make any modifications, as that will be done by Central Services. Instead, you will use it to help you manage your contracts.

How to Look Up Your Contracts

1. To Open Contracts Central, open **Tyler Menu**, click **Financials>Purchasing>Contract Management>Contract Central**.



2. When you open Contract Central, the program displays a Search box where you can search by the contract number or description.

Search by contract number or description

Contract # or description

Q

[Advanced Search](#)

The Advanced Search option allows you to find a contract record using multiple text and list fields. Using Advanced Search, you can also save a search that you can retrieve at a later time using the My Searches list. If you select the Startup Search check box for a saved search, the program automatically initiates that search when you open Contract Central.


- To perform a search, enter the contract number or the description (or a portion of the description) in the search field.

Search by contract number or description

Contract # or description

x Q

[Advanced Search](#)

- Click on the **magnifying glass**  to perform the search.
- The contracts for your selected search will be displayed in a tile/block view.

Contracts: 2

<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p style="margin: 0;">2018000004 Catering Services for Senior Services: RELEASED Available: \$2,600.00 Fiscal Year: 2018 Period: 1</p> </div>	<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p style="margin: 0;">2018000015 Catering Services for Senior Services: POSTED Available: \$9,000.00 Fiscal Year: 2018 Period: 8</p> </div>
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Search results in Contracts Central are limited to 1000 records. If your search criteria exceeds that number, only the first 1000 records display. In this case, narrow your search criteria, so your result is less than 1000 records.

- To switch to a list view, click on the **toggle grid/block view** button.



- Your contracts will be displayed in a list view.

Number	Description	Status	Fiscal Year	Fiscal Period	Entry Date	Amount Available	Percent Available
2018000004	Catering Services for Senior Services	RELEASED	2018	1	02/19/2018	2,600.00	100.00
2018000015	Catering Services for Senior Services	POSTED	2018	8	02/21/2018	9,000.00	90.00

- To output the results to Excel, click on the **Excel** button.  Excel

- The following will be displayed at the bottom of your screen. Click **Open** to open the Excel file.



- The listing of your contracts will be displayed in Excel.

	A	B	C	D	E	F	G	H
1	Number	Description	Status	Fiscal Year	Fiscal Period	Entry Date	Available	Percent Available
2	2018000004	Catering Services for Senior Services	RELEASED	2018	1	02/19/2018	2,600.00	100.00
3	2018000015	Catering Services for Senior Services	POSTED	2018	8	02/21/2018	9,000.00	90.00
4								

11. Whether you are on the Contract Central screen in Munis or in the Excel spreadsheet, you can drill down to the contract details clicking on the contract number.

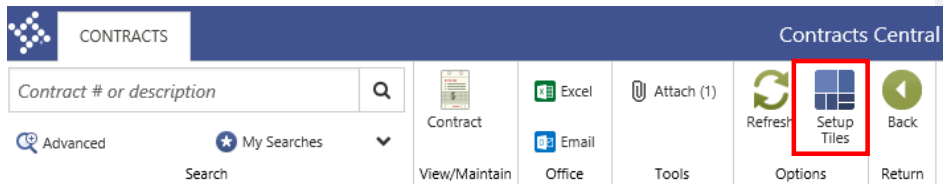
2018000004 Catering Services for Senior Services		SENIOR SERVICES, TASTES BUDZ CATERING LLC	
TOTALS		DATES	
Original	2,600.00	Entered	02/19/2018
Revised	2,600.00	Estimated Start	02/19/2018
Open Req	0.00	Est. Completion	02/19/2018
Open PO	0.00	Initial Expiration	02/19/2019
Expended	0.00	Renewal Action	02/19/2019
Available	2,600.00	Extended Through	02/19/2019

[Invoices](#) | [Purchase Orders](#) | [Requisitions](#) | [Change History](#) | [Approvers](#)

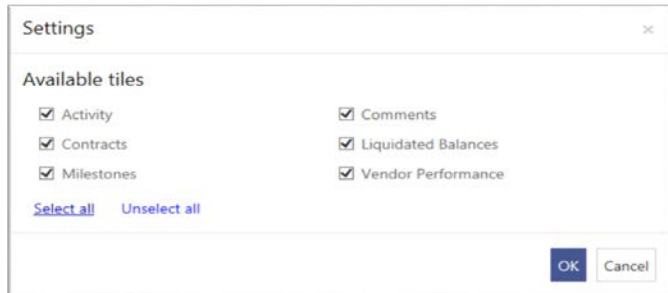
[Accounts Payable \(0\)](#) | [Recurring \(0\)](#) | [General Billing \(0\)](#) | [Progress Payments \(0\)](#)

No AP invoices found.

12. The specific contract details that you can see are determined by your settings, which can be defined by clicking on the **Setup Tiles** button from the main ribbon.



13. The settings allow you to check off the details that you would like to view. If you have not previously defined the detail settings, the program automatically displays the Settings dialog box the first time you drill down on a contract.



14. The system will allow you to view invoice activity, purchase order activity, requisition activity, change order activity and approver activity for the contract.

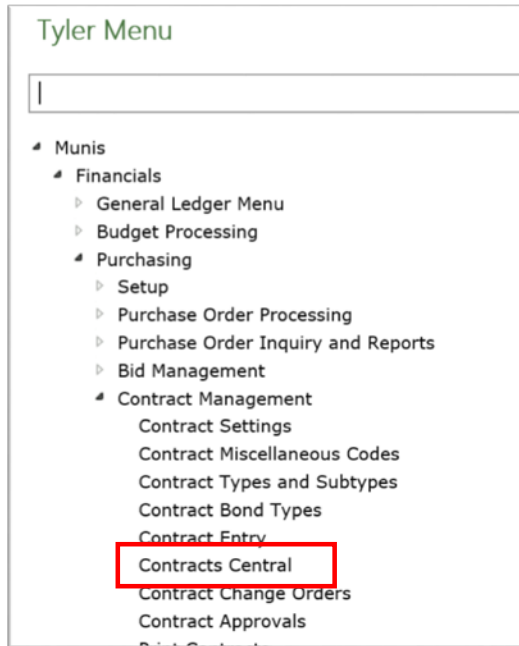


15. Please refer to Appendix A for a description of the fields/information that are displayed on the Contracts Central screen.

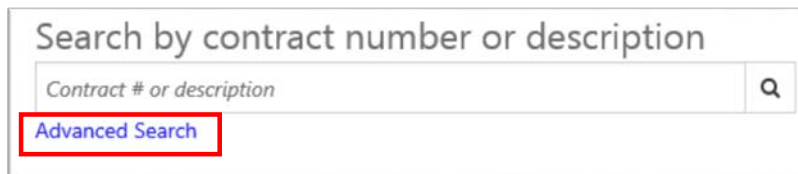
How to Save your Search Settings

The Contract Central screen has the ability to save your search settings so that each time you open the Contract Central screen, it will automatically display the filtered search results. For example, you can save a setting to display only the invoices that belong to your department.

1. To Open Contracts Central, open **Tyler Menu**, click **Financials>Purchasing>Contract Management>Contract Central**.




2. When you open Contract Central, the program displays a Search box where you can enter the contract number or description. Click on the **Advanced Search** button.



3. The Advanced Search window will display.


4. If you would like to view contracts for your department, select your department from the pull-down list. (Fill out the search criteria however you would like to filter the search)

5. Click on the **Save** button. 
6. Enter a name for your saved report and click **OK**.

A dialog box titled "Name *" with a text input field containing "CS Contract report" and a close button (X). Below the input field are two buttons: "Ok" and "Cancel".

- Your report name will be displayed in the upper right-hand corner under My Searches. Check the **Startup search** box.

The "Advanced Search" interface includes a "My searches" dropdown menu showing "CS Contract report". Below it is a checkbox labeled "Startup search" which is highlighted with a red box. The search criteria section contains several fields: Contract Number, Description, Department (set to "1500 - CENTRAL SERVICES"), Vendor, Fiscal Year, PO Number, Status, Entry Date (with an "Equals" dropdown and calendar icon), Entered By, Requisition Number, and Invoice Number. At the bottom are buttons for "Search", "Save", "Save As", "Reset", and "Cancel".

- Click **Save** to save the settings.  The next time you run Contract Central from the Tyler menu, the system will automatically generate the results based upon your saved search criteria.

Appendix A

What do each of the fields mean on the Contract Central screen?

Tile	Description
Activity	Displays transaction activity that has been entered against the contract.
Comments	Displays any comments or notes associated with the contract record. In this screen, you cannot add any more comments.
Contract	Provides general contract information in a similar format to the main program screen. However, the pane also contains a Totals tab, which displays the contract's total dollar amounts by type.
Invoices	<p>Lists the invoices that have been charged to the contract. The pane contains three tabs: Accounts Payable, Recurring, and General Billing. Each tab displays invoices that match the tab type. For example, the Accounts Payable tab displays accounts payable invoices, but not recurring or general billing invoices.</p> <p>Click an invoice number to open the invoice in Invoice Central, or click the vendor name to open the vendor record in Vendor Central. You can also view files that have been attached to the invoice by clicking the TCM button.</p>
Milestones	Displays the contract's milestone data in three tabs: Main, Dates/Amounts, and Notes. Click the list button in the pane header to view the milestone information in a brief list format.
Purchase Orders	Lists the purchase orders that have been entered against the contract. Click a purchase order number to open it using the Purchase Order Inquiry function. You can change the display format of the pane from list view to grid view by clicking the grid button on the pane header.

Tile	Description
Requisitions	Contains a list of the requisitions that have been entered against the contract. Click a requisition number to open it using the Requisition Entry function. You can view the requisition data in grid format by clicking the grid button on the pane header.
Unencumbered Balances	Provides a summary view of the remaining balance on the contract. The pane contains colored boxes for purchase orders, invoices, and requisitions. Each box indicates the number of records that exist for the contract and the total value of those records. Click a colored box to change the record type that is displayed in the table below the boxes. Clicking a record number, such as a purchase order number, opens that record as the active record in the appropriate inquiry program.
Vendor Performance	Displays the vendors that are associated with the contract. You can click on a vendor name to see more details about the vendor.