MUNIS
END USER GUIDE

E-PROCUREMENT

Table of Contents

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.

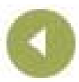
Button	Description
Confirm	
 Accept	Accept saves information after you create or update a record. This button is often highlighted when adding, updating, or searching for records.
 Cancel	Cancel ends an operation, such as adding or updating a record.
Search	
 Search	Search finds records in a program. 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.
 Query Builder	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

Button	Description
	Microsoft Excel or Microsoft Access) provides options for creating an expression based on the fields in the active program.
Actions	
 Add	Add enters a new record into the database. When you click Add, entry fields become available with the cursor positioned in the first field. The program may place default values in fields to save you keystrokes, but typically you can replace the default values. Press **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.
 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.
 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	

Button	Description
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.
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.
Preview	Preview immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.
Office	
Excel	Excel exports the active set of records to a Microsoft Excel spreadsheet. • 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.

Button	Description
	In each case, the program inserts hyperlinks to the individual Munis records. The file created during export is automatically saved to your Munis directory; use the Save As feature in Excel to save the file to a new location.
Word	Word creates an active set of records to export into Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing.
Email	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. **Note:** This feature requires that the Tyler Dashboard be enabled.
Schedule	Schedule displays the Appointments screen, which schedules meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message containing meeting start and end times, and a meeting description. You can define the meeting times and modify the description, as appropriate. When the email recipient accepts the meeting, it is automatically added to his or her Exchange calendar.
Tools	
Attach	Attach allows you to view, add, or delete documentation related to the current record. • 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. • If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you

Button	**Description**
	can add or access documentation from your Munis server. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files. **Note:** This option is accessible only if the View Attachments and Associated Documents 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.
 Notes	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.
 Notify	Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone, email, or text message using predefined content. **Note:** This feature is only available if your organization has installed and implemented Tyler Notify.
 Audit	Audit provides the audit history for the selected record.
 MapLink	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.
 Alerts	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

Button	Description
	not available for use with all Munis programs. Click the down arrow to manage alerts.
Menu	
 More	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.
Return	
 Return	Return closes the current screen and returns you to the previous screen of the active program.

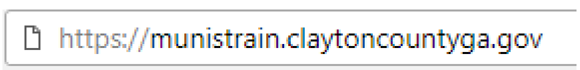
E-Procurement

Within this section, you will learn:

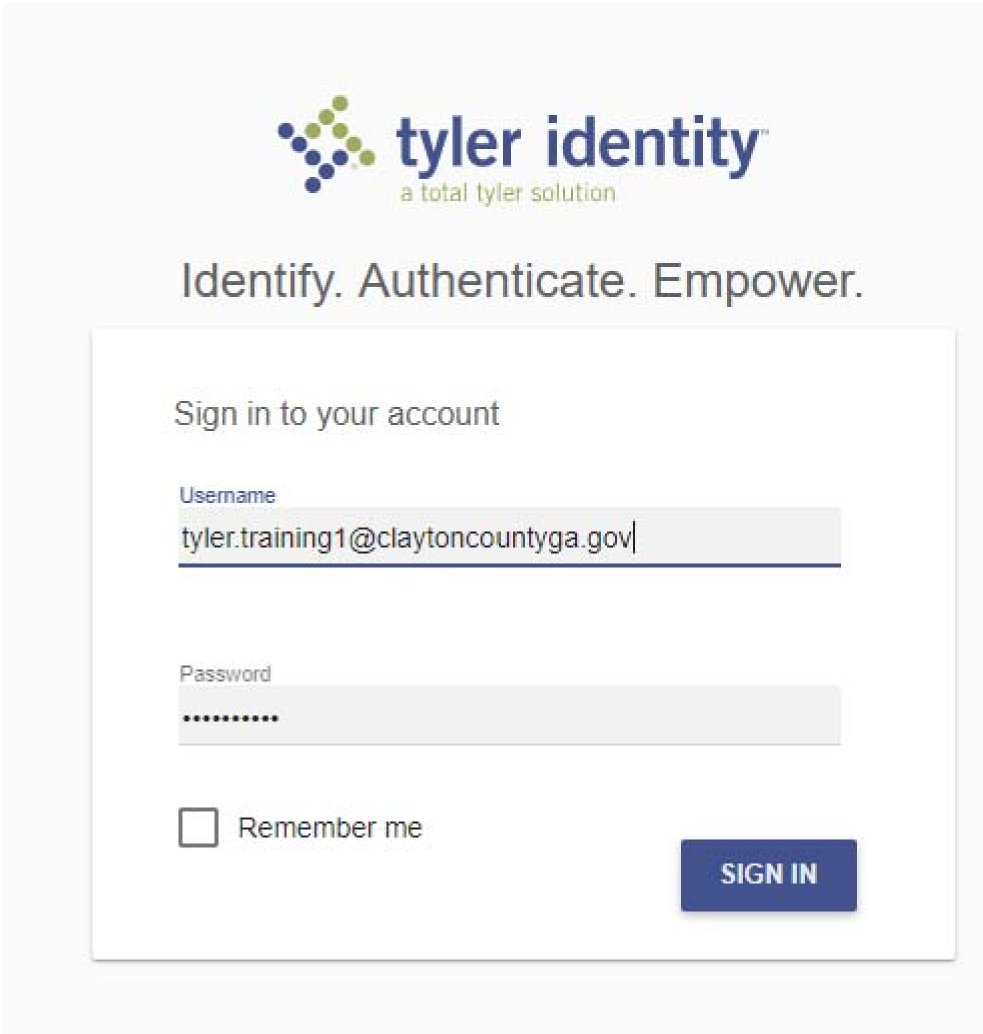
- ✓ How to enter a requisition.
- ✓ How to attach documents to your requisition.
- ✓ How to release your requisition for approvals.
- ✓ Required approvals a for a requisition.

How to Create a Requisition

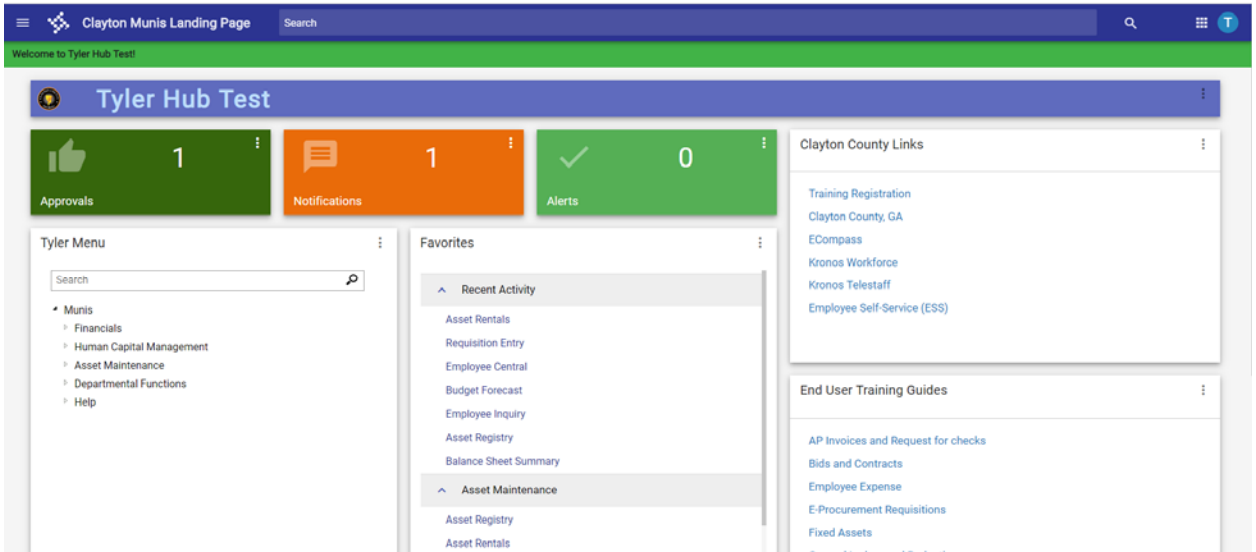
1. Login to Munis by opening Internet Explorer and entering https://munistrain.claytoncountyga.gov into the URL bar.



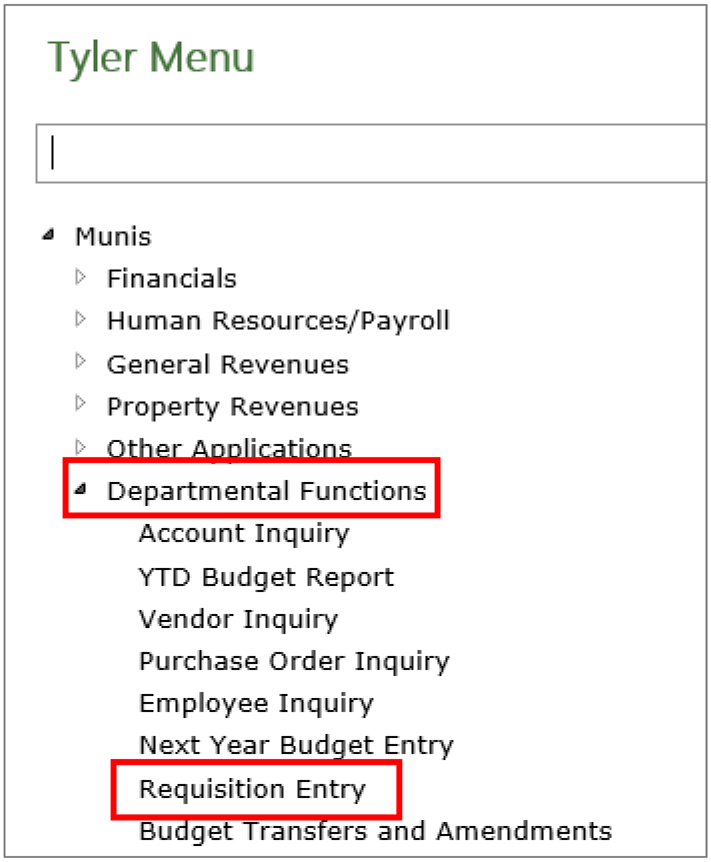
2. A security window will display. Enter your credentials (your County email/password).



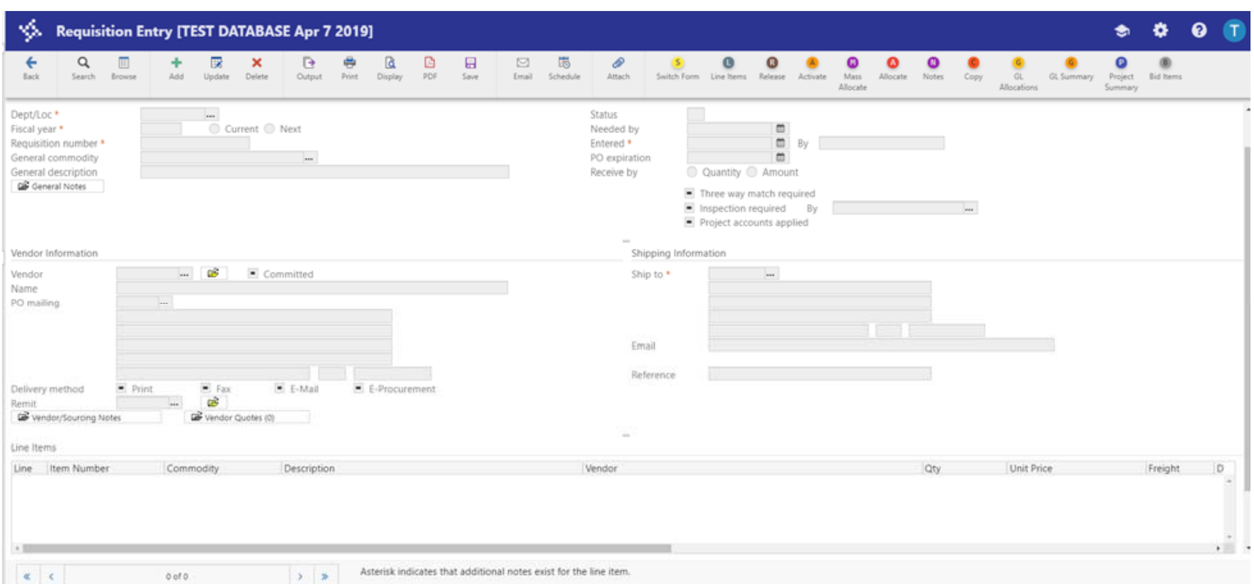
3. Click Sign In. The Tyler Hub screen will display. It is recommended to use the **Clayton Munis Landing Page.**



4. From the Tyler menu, click on **Munis >Departmental Functions> Requisition Entry.**



5. The Requisition Entry screen will display:

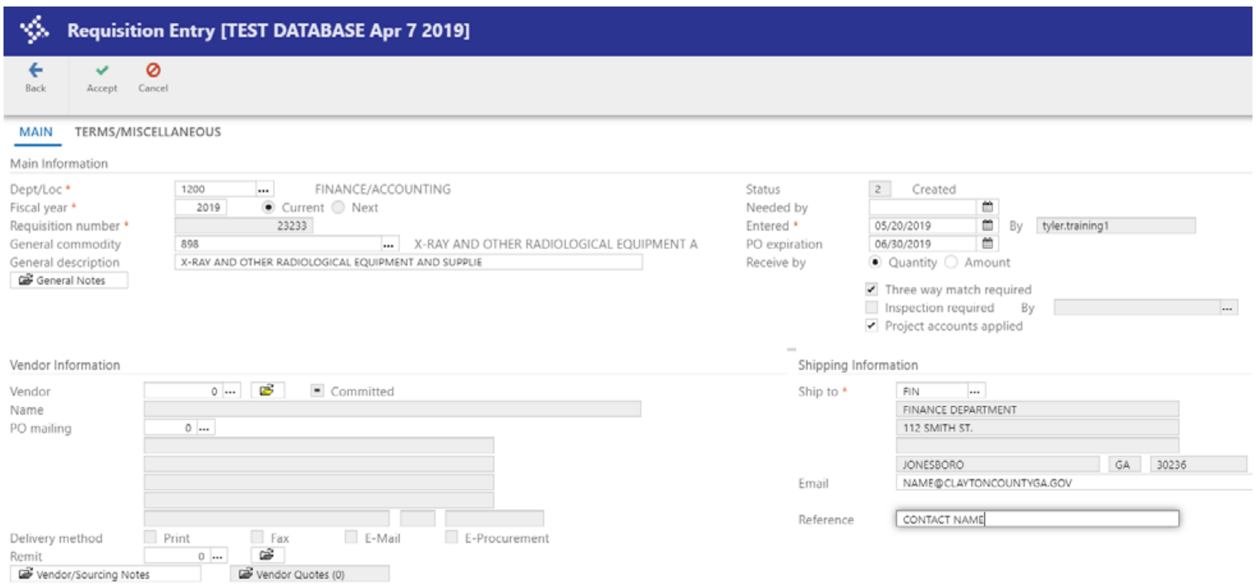


6. Click on the **Add** button from the ribbon bar. 

Your Department/Location, fiscal year, and requisition number should automatically populate.

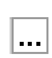
Main Tab

Main Tab - Main Information Section



**NOTE* tabbing through the fields will take you to the next required field to enter information.*

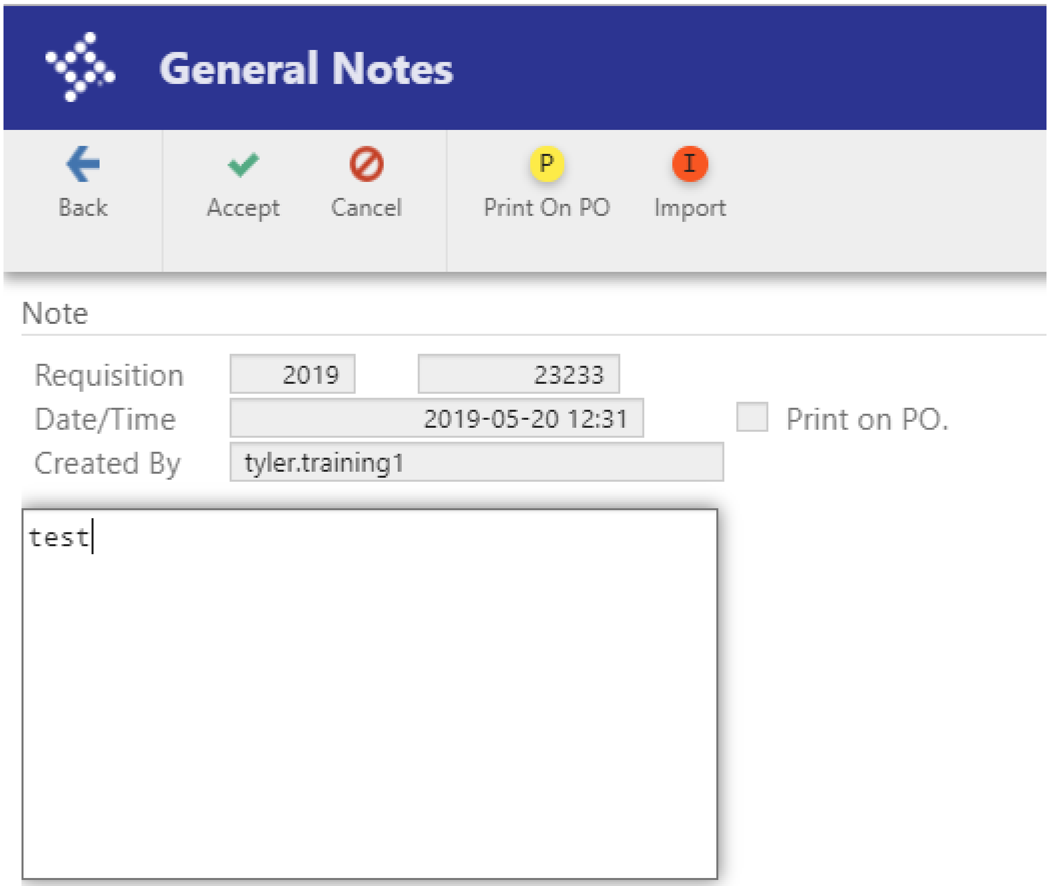
7. Tab through the fields on the Main Information section of the Main Tab and complete the following information.

   a) **General Commodity** - Click the Field Help  (ellipse) to the right of the General Commodity field to look up your 3-digit commodity code. You will be brought to a screen that displays all available commodity codes. Select the one you would like and then click on the **Accept** button. 

Please refer to the Field Help section for more information on using the Field Help ellipse and also on how to filter the data.

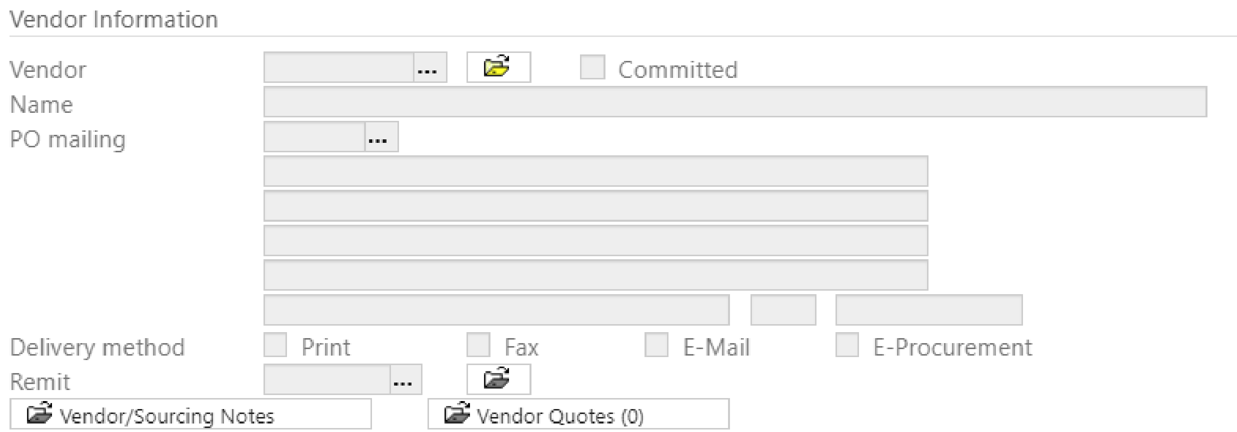
   b) **General Description** –When you tab into the General Description field, the description will default based upon the selected commodity code. **NOTE *you can modify or update the description if needed.*

c) **General Notes –** You can click on the General Notes button to enter comments that can be printed on the PO. *(Click on the Print on PO box to print the comments on the PO)*



Main Tab - Vendor Information Section

You can skip this section, as a vendor is not required for E-procurement.



Main Tab - Shipping Information Section

8. You can change your SHIP TO information if necessary.

   a) **Ship To** – The shipping information will auto-populate based on your Dept./Loc. This information will print on the Purchase Order that is sent to the vendor. You can change the default location of where you want your goods to be shipped by clicking on the **Field Help** ... ellipse to the right of the field. Refer to the Field Help section of this document for more information on using Field Help.

   b) **Email** – Enter your email address so the vendor can contact you with any questions.

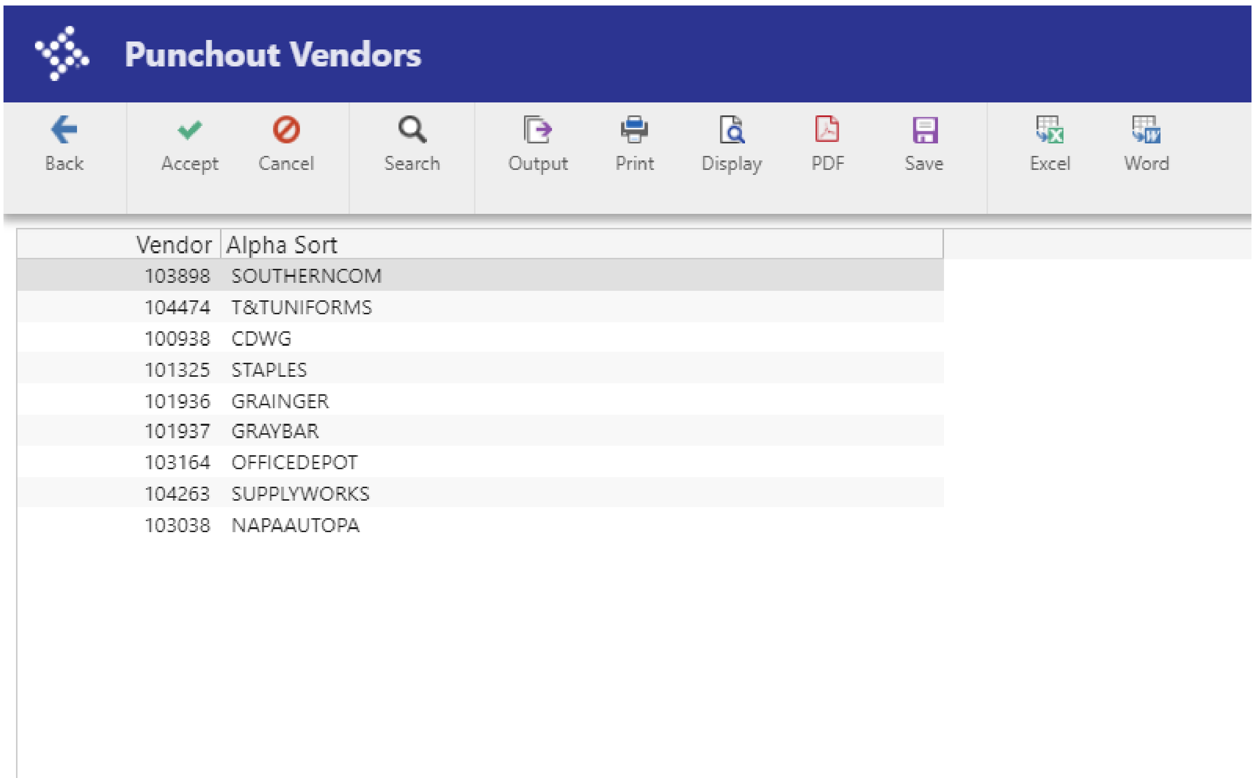
   c) **Reference** - Enter any shipping notes (Suite #, Floor #, etc.) in the Reference box

9. Click on the **Accept** button. 

Line Item Screen

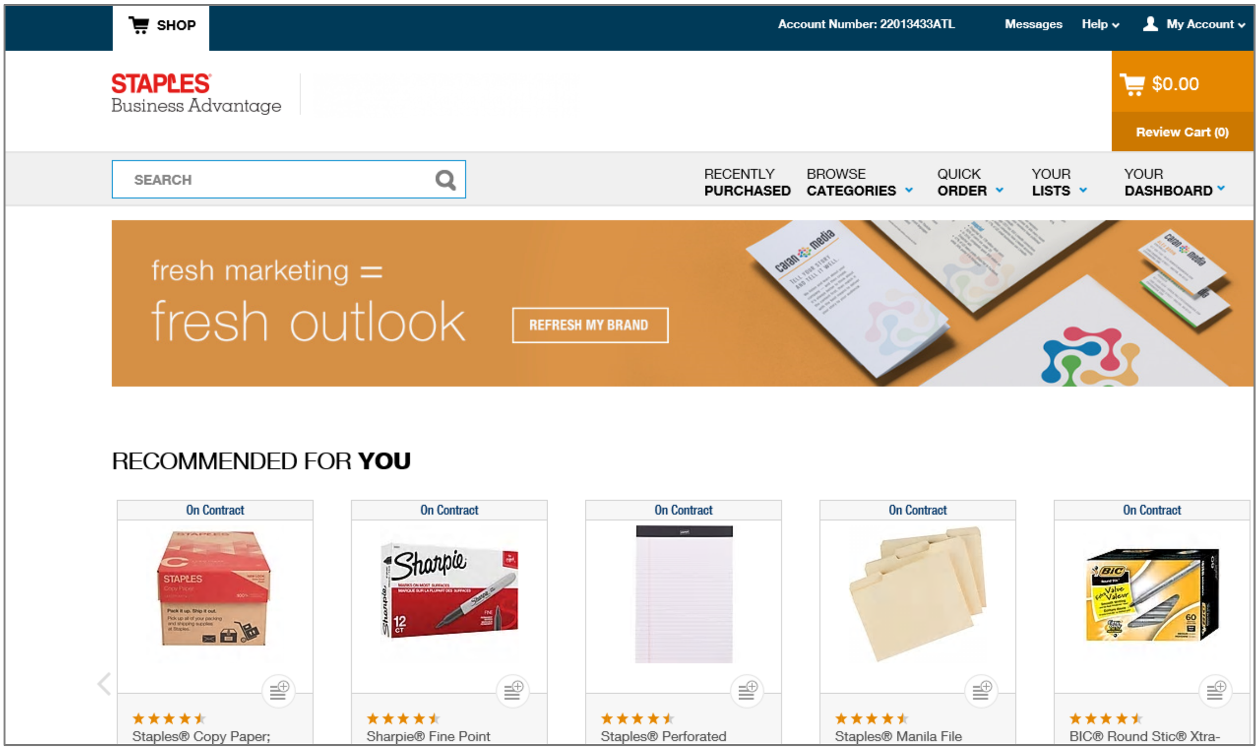
10. The system will take you to the Line Items screen. Click on the **Shop Online** button from the main ribbon bar. Shop Online

11. The Punchout Vendors screen will display:

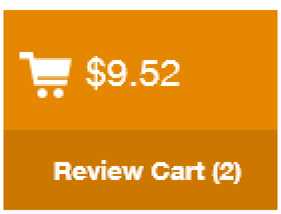


12. Click on the vendor that you would like to procure goods from and click the **Accept** button.

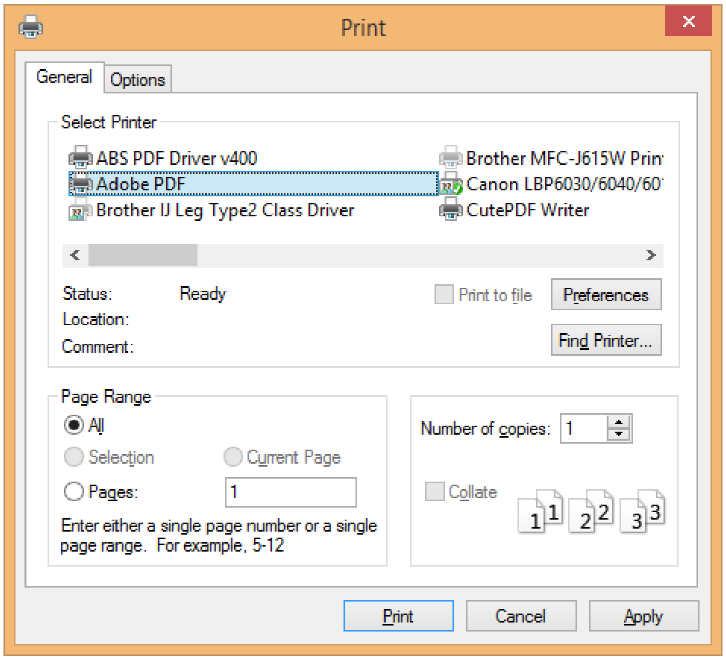
13. A new tab will open which connects you to the vendor's website.



14. Shop online and add the items to your cart. The order minimum is $35.00. When you are finished shopping, click **Review Cart**.



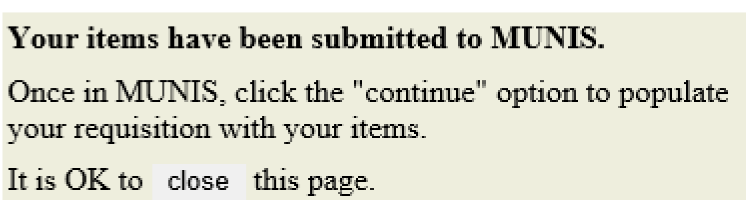
15. Press **Ctrl + P** to print your cart items from Internet Explorer. A Print window will display. Select your printer and click Print.



The printout will need to be attached to your requisition. As such, it is preferred to print the document to PDF and then save it on your computer in electronic format so that it can be easily attached to the requisition. If you print it to the printer, then you will need to scan the document in order to attach it to the requisition.

16. Click the **Submit Order** button.

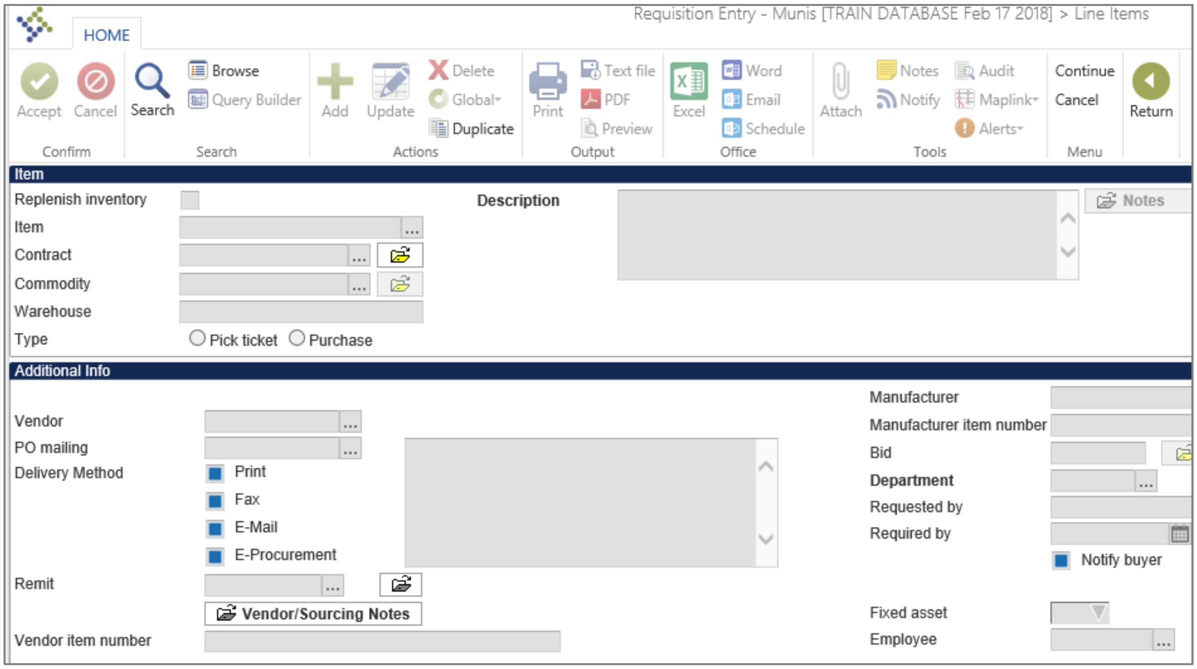
17. You will be presented with the following message:


Your items have been submitted to MUNIS.

Once in MUNIS, click the "continue" option to populate your requisition with your items.

It is OK to close this page.

18. Click close to return to Munis.

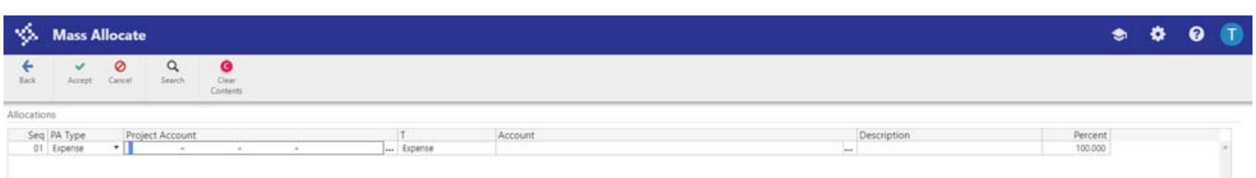


19. Click the **Continue** button on the main ribbon bar.

20. Your item description/numbers will automatically appear in MUNIS. You can double check how many items were added by looking at the bottom left corner of the screen (It will say 1 of 3, or however many line items you entered).

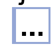
21. Click on the **Mass Allocate** button from the main ribbon bar.

22. The system will take you to the Mass Allocate screen:



23. In the Allocation Section of the Line Items Screen, complete the following fields:

a) **Type** – Will default to Expense.

b) **Project Account** – If the purchase is related to a project, enter the project account number. To look up the account number, click on the **Field Help** ellipse.  Refer to the Field Help section for more information on field help. If you choose a project account, the Account (GL account) will default automatically once you tab to that field.

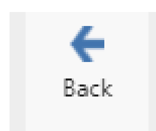
c) **Account** – Enter the account number (if you entered a project number, this account will default). For an explanation of the account number segments, please refer to the General Ledger & Budgeting user manual. To look up the account number, click on the **Field Help** ellipse.  Refer to the Field Help section for more information on field help.

d) **Description** – The description for the account will default.

e) **Percent** – Enter the percent of the total order expense that should hit that General Ledger/Project account. You can split up the order total and allocate it amongst several different General Ledger//Project accounts by creating several allocation lines with the appropriate percentages to break up the distribution appropriately.

Please note that when you create a new allocation line, it will default to the same GL account information as the previous line. To use a different account, clear out the GL information before using the field help.

24. Click the **Accept** button when you are done entering allocation lines for the item. 

25. Click on the **Back** button to return to the Line Items screen. 

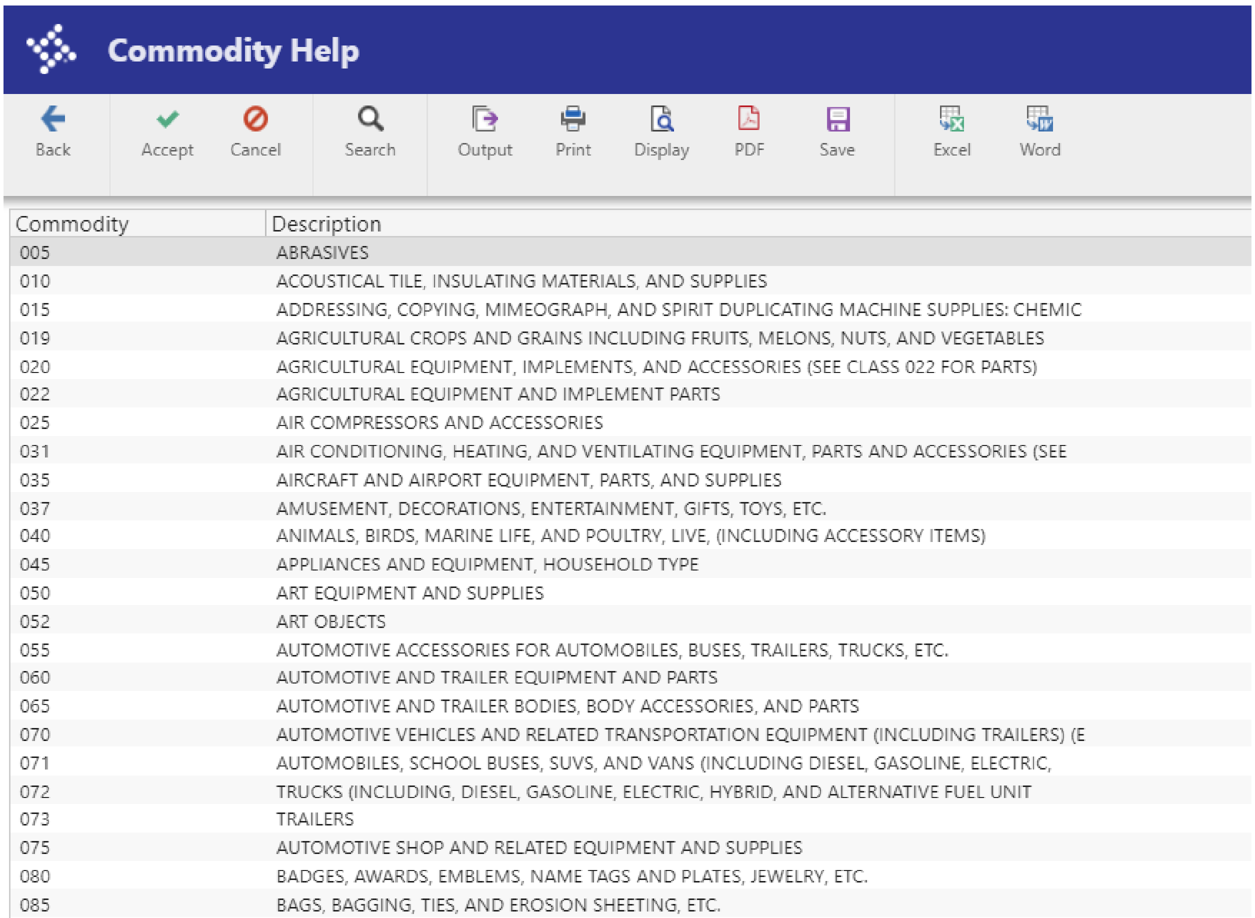
26. Attach your supporting document (the cart page you printed from Internet Explorer) to your requisition by clicking the paper clip on the ribbon. See the How to Attach a Document section for instructions on how to add attachments.

How to Use Field Help

The **Field Help** ellipse button can be used to perform a lookup on any field. An example is provided below on how field help can be used.

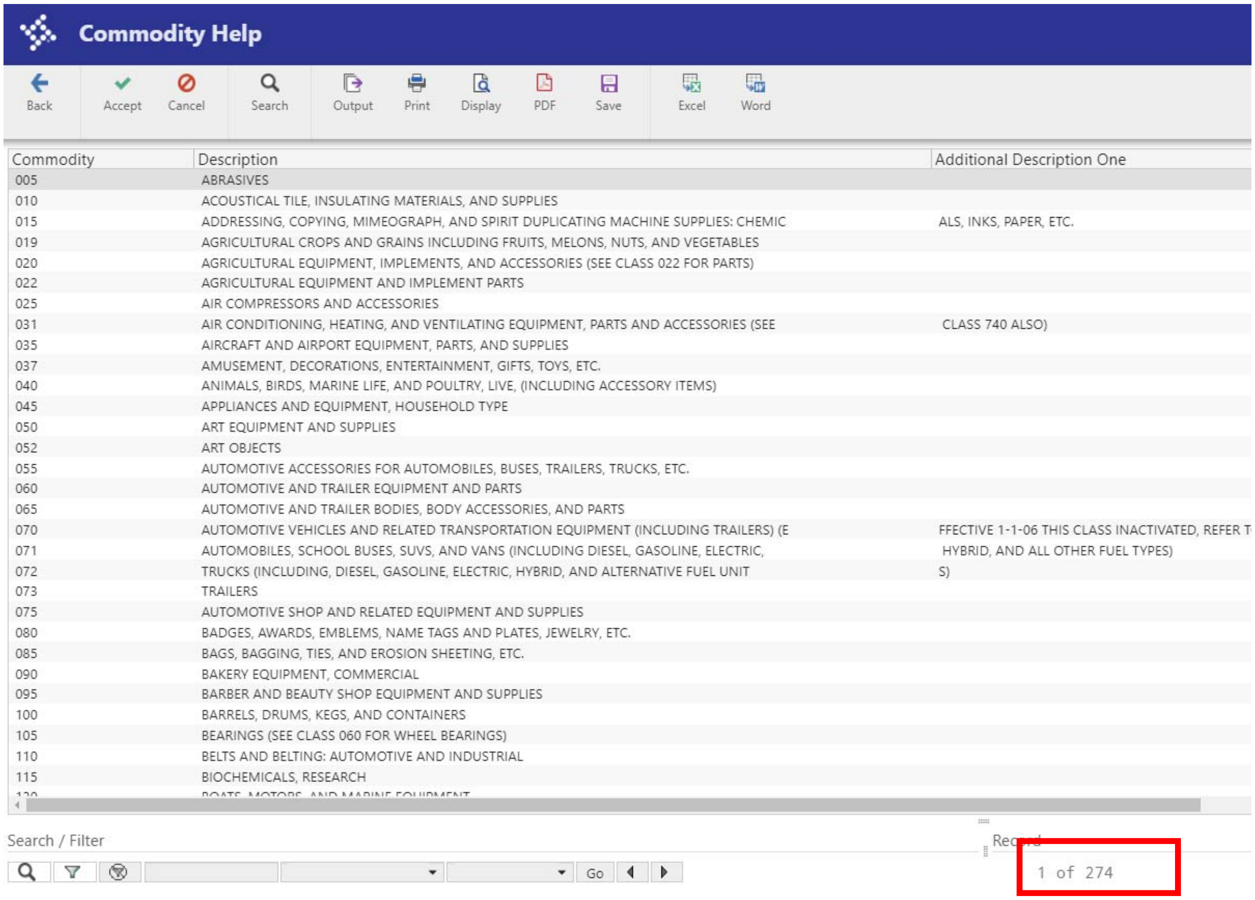
1. Click on the **Field Help** ellipse ... to the right of the field.

2. The system will bring you to a screen that will provide a listing of all values that are available.



Commodity	Description
005	ABRASIVES
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMIC
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025	AIR COMPRESSORS AND ACCESSORIES
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SEE
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES
037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
040	ANIMALS, BIRDS, MARINE LIFE, AND POULTRY, LIVE, (INCLUDING ACCESSORY ITEMS)
045	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE
050	ART EQUIPMENT AND SUPPLIES
052	ART OBJECTS
055	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRAILERS, TRUCKS, ETC.
060	AUTOMOTIVE AND TRAILER EQUIPMENT AND PARTS
065	AUTOMOTIVE AND TRAILER BODIES, BODY ACCESSORIES, AND PARTS
070	AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT (INCLUDING TRAILERS) (E
071	AUTOMOBILES, SCHOOL BUSES, SUVS, AND VANS (INCLUDING DIESEL, GASOLINE, ELECTRIC,
072	TRUCKS (INCLUDING, DIESEL, GASOLINE, ELECTRIC, HYBRID, AND ALTERNATIVE FUEL UNIT
073	TRAILERS
075	AUTOMOTIVE SHOP AND RELATED EQUIPMENT AND SUPPLIES
080	BADGES, AWARDS, EMBLEMS, NAME TAGS AND PLATES, JEWELRY, ETC.
085	BAGS, BAGGING, TIES, AND EROSION SHEETING, ETC.

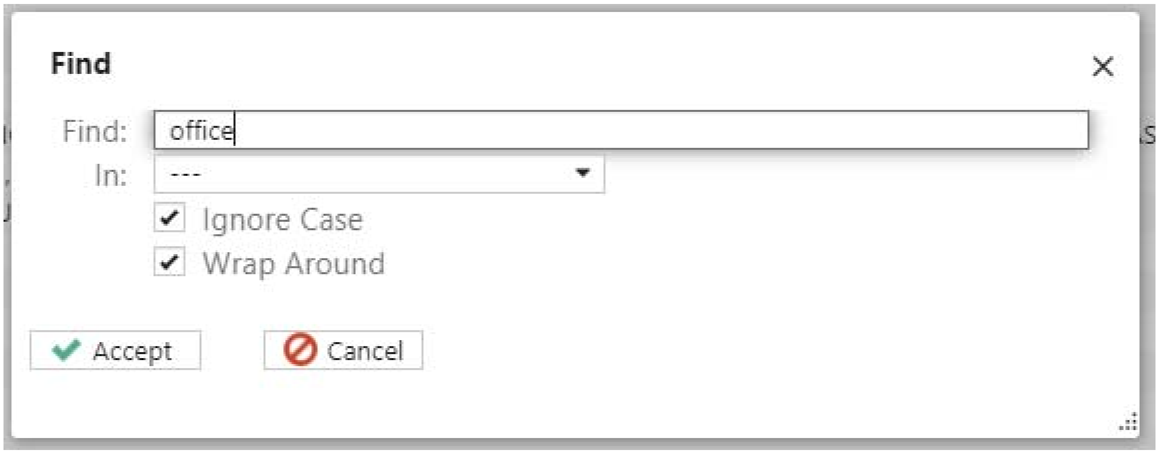
3. The lower right-hand corner of your screen will identify the number of values being displayed to choose from.



Commodity	Description	Additional Description One
005	ABRASIVES	
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	
015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMIC	ALS, INKS, PAPER, ETC.
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)	
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS	
025	AIR COMPRESSORS AND ACCESSORIES	
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SEE	CLASS 740 ALSO)
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES	
037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.	
040	ANIMALS, BIRDS, MARINE LIFE, AND POULTRY, LIVE, (INCLUDING ACCESSORY ITEMS)	
045	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE	
050	ART EQUIPMENT AND SUPPLIES	
052	ART OBJECTS	
055	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRAILERS, TRUCKS, ETC.	
060	AUTOMOTIVE AND TRAILER EQUIPMENT AND PARTS	
065	AUTOMOTIVE AND TRAILER BODIES, BODY ACCESSORIES, AND PARTS	
070	AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT (INCLUDING TRAILERS) (E	FFECTIVE 1-1-06 THIS CLASS INACTIVATED, REFER T
071	AUTOMOBILES, SCHOOL BUSES, SUVS, AND VANS (INCLUDING DIESEL, GASOLINE, ELECTRIC,	HYBRID, AND ALL OTHER FUEL TYPES)
072	TRUCKS (INCLUDING, DIESEL, GASOLINE, ELECTRIC, HYBRID, AND ALTERNATIVE FUEL UNIT	S)
073	TRAILERS	
075	AUTOMOTIVE SHOP AND RELATED EQUIPMENT AND SUPPLIES	
080	BADGES, AWARDS, EMBLEMS, NAME TAGS AND PLATES, JEWELRY, ETC.	
085	BAGS, BAGGING, TIES, AND EROSION SHEETING, ETC.	
090	BAKERY EQUIPMENT, COMMERCIAL	
095	BARBER AND BEAUTY SHOP EQUIPMENT AND SUPPLIES	
100	BARRELS, DRUMS, KEGS, AND CONTAINERS	
105	BEARINGS (SEE CLASS 060 FOR WHEEL BEARINGS)	
110	BELTS AND BELTING: AUTOMOTIVE AND INDUSTRIAL	
115	BIOCHEMICALS, RESEARCH	

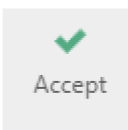
4. Click the **Search** button from the main ribbon to look up your commodity code.

5. A find window will appear. In the “Find” field, enter what you are looking for (or a portion of the word/phrase). In the “In” field, select Description.



6. Click **Accept**.

7. Scroll through the results to find the commodity you would like to purchase (highlight/click on that row) and then click Accept.



8. You can alternatively use the Filter tool in the lower left-hand corner of your screen. (The filter tool will narrow down the number of records displayed, whereas the search tool will simply advance you to the record you are looking for)

9. Click on the **Filter** icon and then enter your filter criteria. At a minimum, you will be able to filter by the code or by the description.

a) Enter the following information to perform a filter.

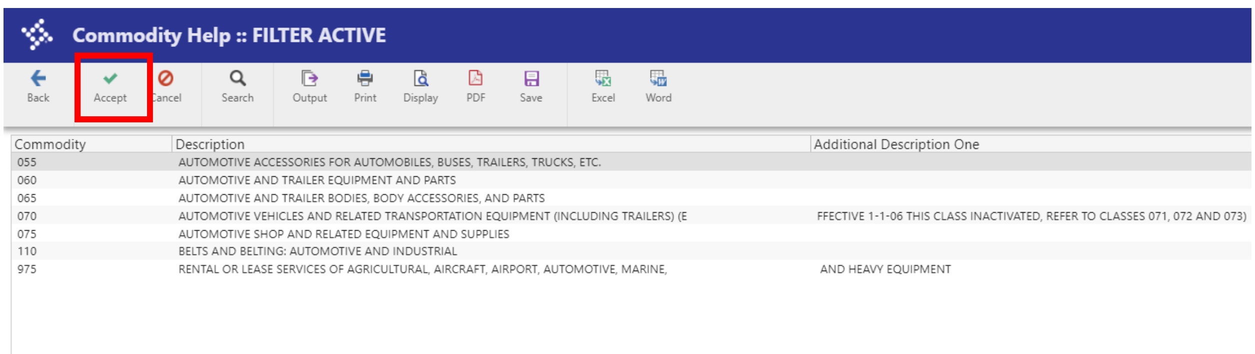
i) In the first field, you can enter a portion of the code or description that you want to search based upon.

ii) In the second field, select the field that you would like to perform the search based upon.

iii) In the third field, leave it as New Filter.

a) Click **Go** to perform the filter. 

10. From the filtered list, find and then click on an item to select it and then click on the **Accept** button.



11. The system will return you to the previous screen.

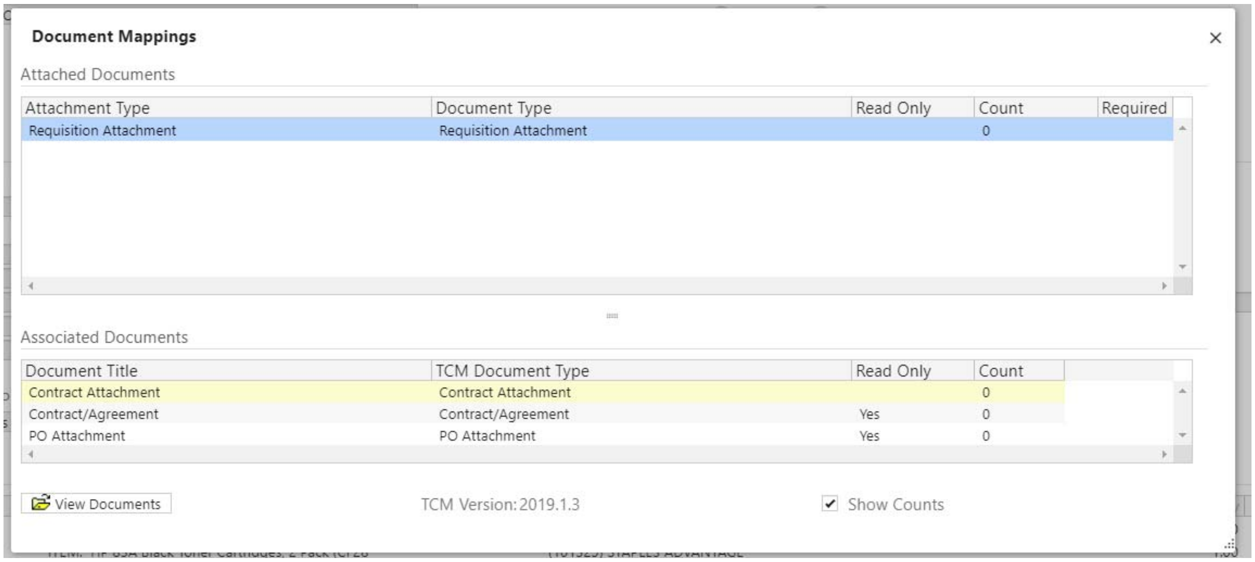
How to Attach a Document

(TCM) Tyler Content Manager is used to save and process all attachments. Various programs throughout Munis allow you to attach documents to records, as indicated by the Attach button in the ribbon. Use this option to store a document in TCM. To attach a document using TCM, the document must be accessible on your computer, or you must have a scanner attached to your computer.

End User can attach a Vendor Quote and Supporting Documents to their requisition for their buyer to reference. While on the Requisition Entry screen, follow these steps to attach your bids/quotes or other support documentation.

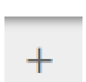
1. Click **Attach** from the ribbon bar to attach supporting documentation files. 

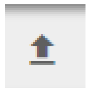
2. The system will bring you to the Document Mappings screen.



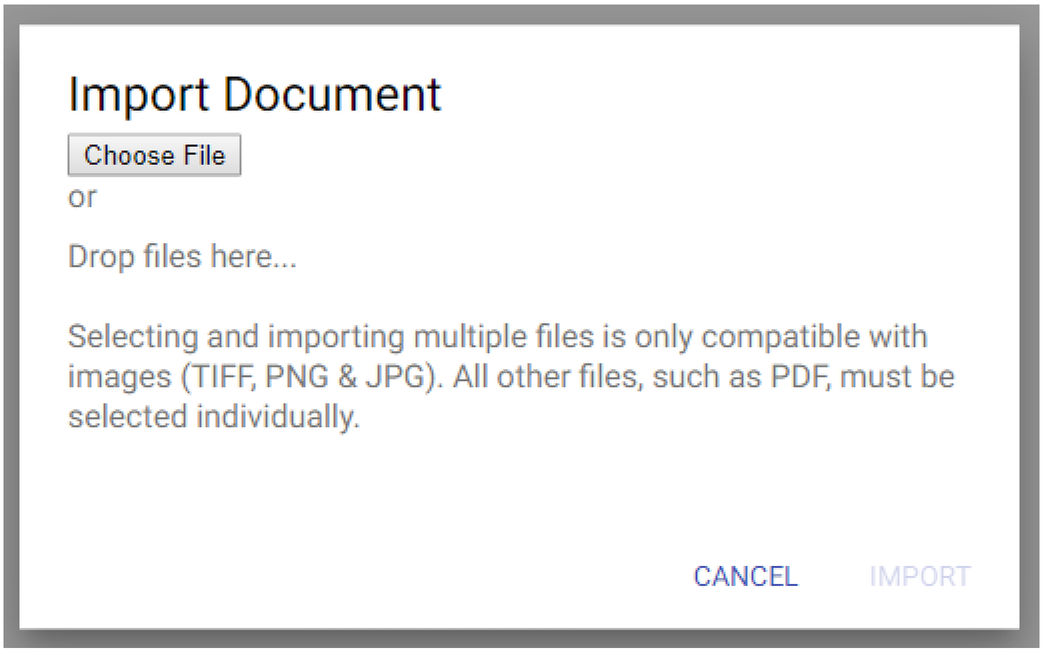
3. Click on the Requisition Attachment row and then click on the **View Documents** button.

4. You will be brought to the Tyler Content Manager.

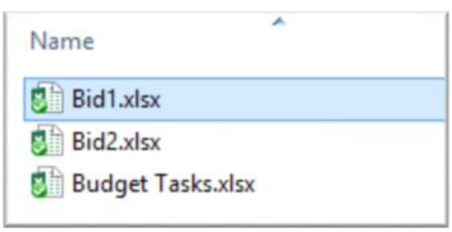
5. Click the **+** button.  to attach a new document to your requisition.

6. Click on the **Import** button.  to find the file to attach to your requisition.

7. A pop-up window will display. Click on **Choose File**

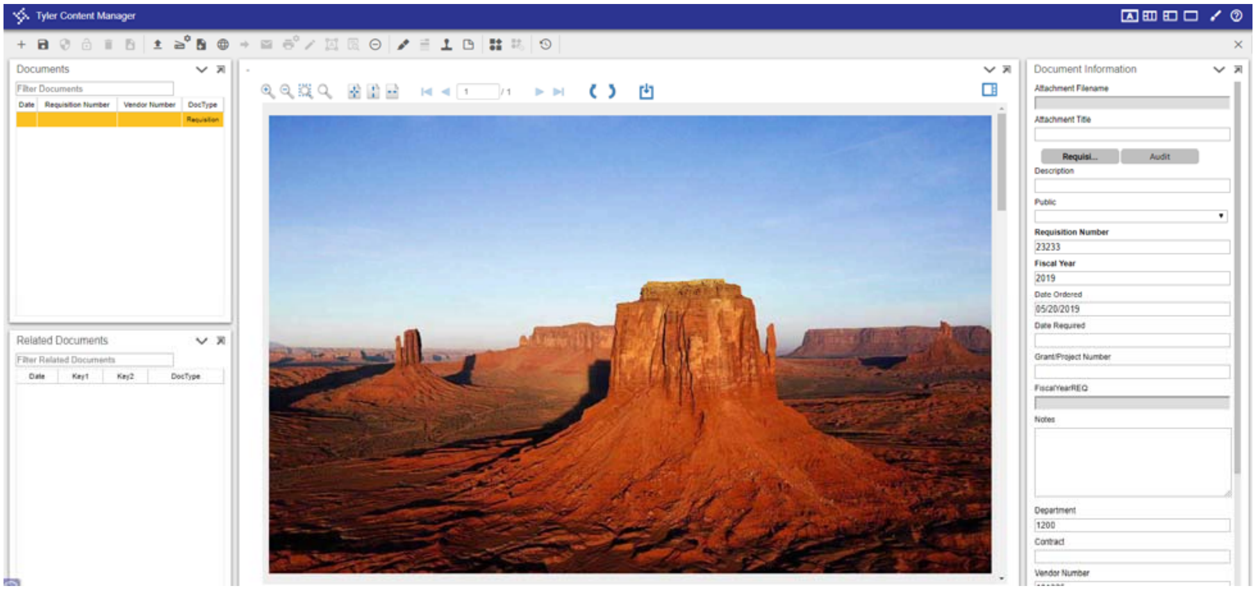


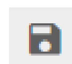
8. A file explorer window will display. Find the file that you would like to attach and select it.



9. Once you have selected the file that you would like to attach, click on the **Import** button.
   IMPORT

10. Your attachment will display in the center of the window. Complete the required information under the Document Information section on the right panel to describe your document.

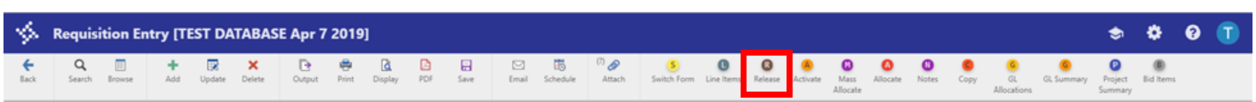


11. Click on the **Save** button to save the document attachment. 

12. **Close** the TCM tab.

How to Release your Requisition for Approval

1. Once you have reviewed your requisition entry for accuracy and you have attached your supporting documents, click **Release** on ribbon bar to submit the requisition and initiate the approval process. Once released, the status of your requisition will be 4-Allocated. The requisition must be reviewed and approved by required parties before it is converted to a purchase order.

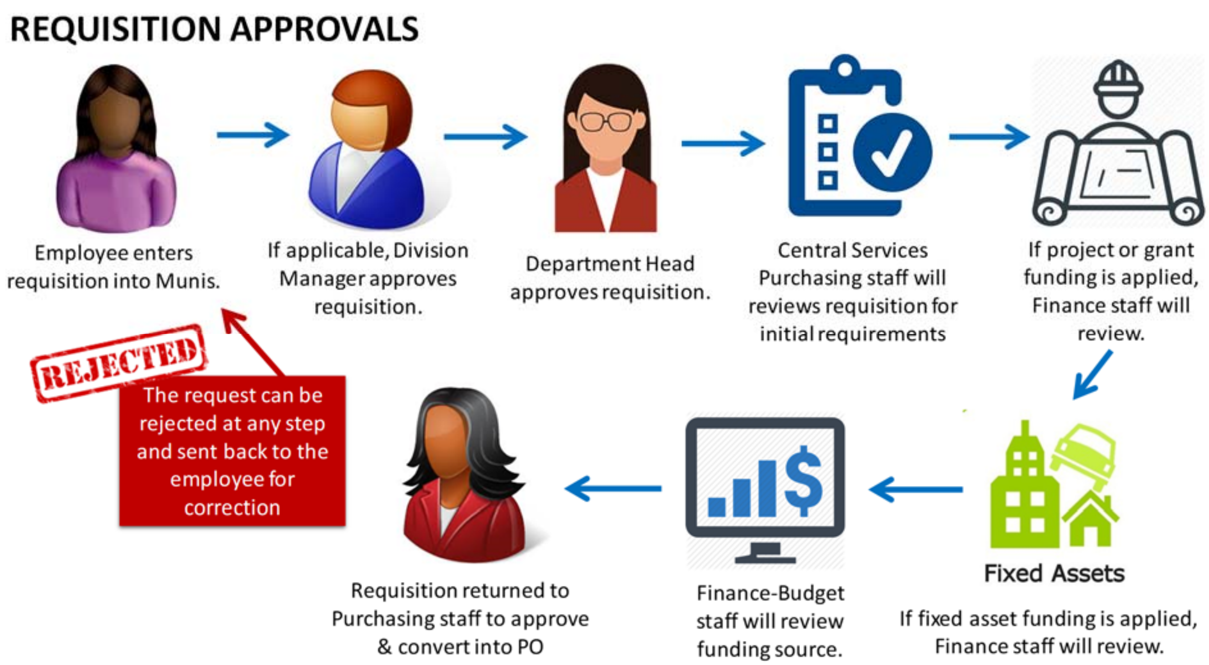


2. Once a requisition has been released into workflow, it cannot be modified. If changes are needed, an approver must reject the requisition and a new one has to be entered. Please refer to the Purchase Order Change Order section for instructions on how to modify a purchase order.

Requisition Approvals

What Approvals are Required on a Requisition?

Once you Release your requisition request, it will enter an automated workflow which will forward it to the appropriate parties for approval. When approvals are pending, required approvers will receive a notification through an e-mail, Tyler Dashboard, or both, indicating that there are records awaiting approval. Each approver will review the transaction for validity and ensure that all supporting documentation has been attached through Tyler Content Manager. The approver can then choose to approve, reject, hold, or forward a transaction to another user for additional review.



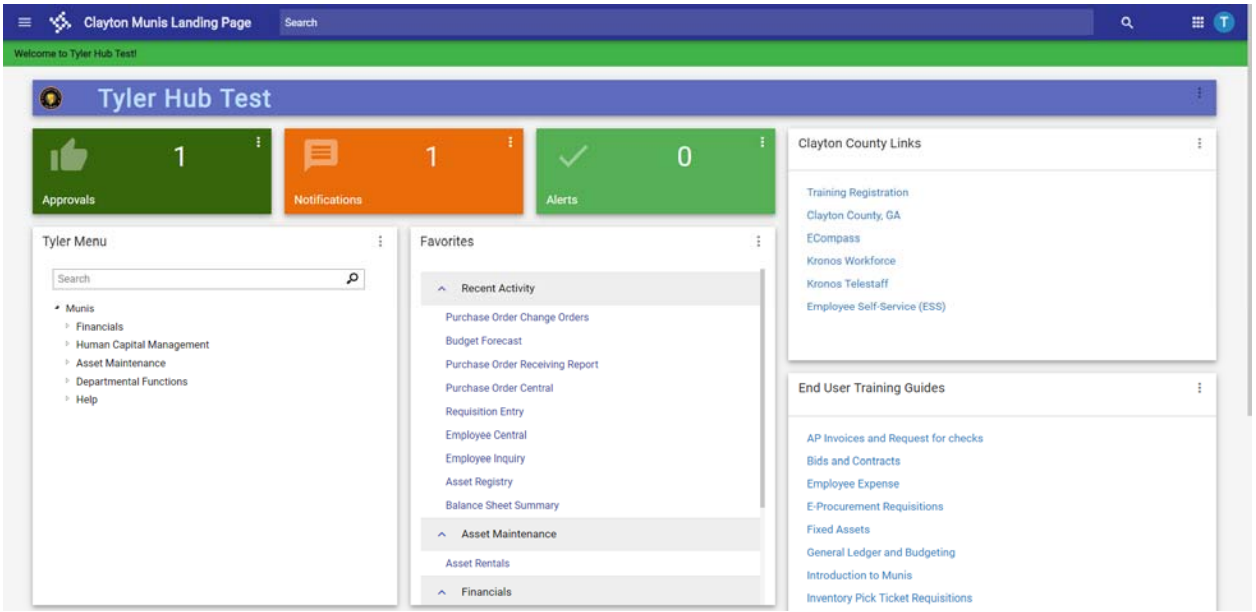
Once the approval process has been completed, the status of the transaction will be 8-Approved, but it will not yet be converted to a Purchase Order.

The Central Services Purchasing staff will convert the requisition to a purchase order, which will move the pre-encumbrance to an encumbrance.

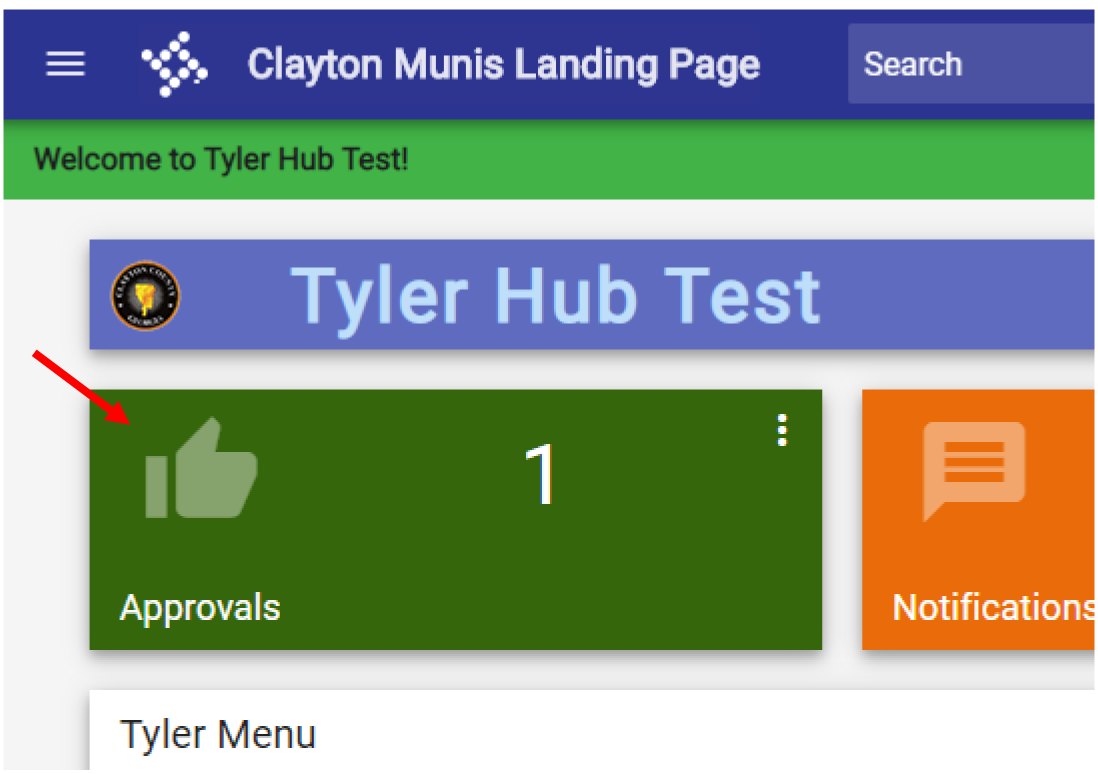
How do I Approve a Requisition?

If you are a Division Manager, Department Head, Central Services Purchasing staff member or if you a Finance-Budget approver, then you will be required to approve requisition requests. The following steps define how you can approve a pending approval on a requisition.

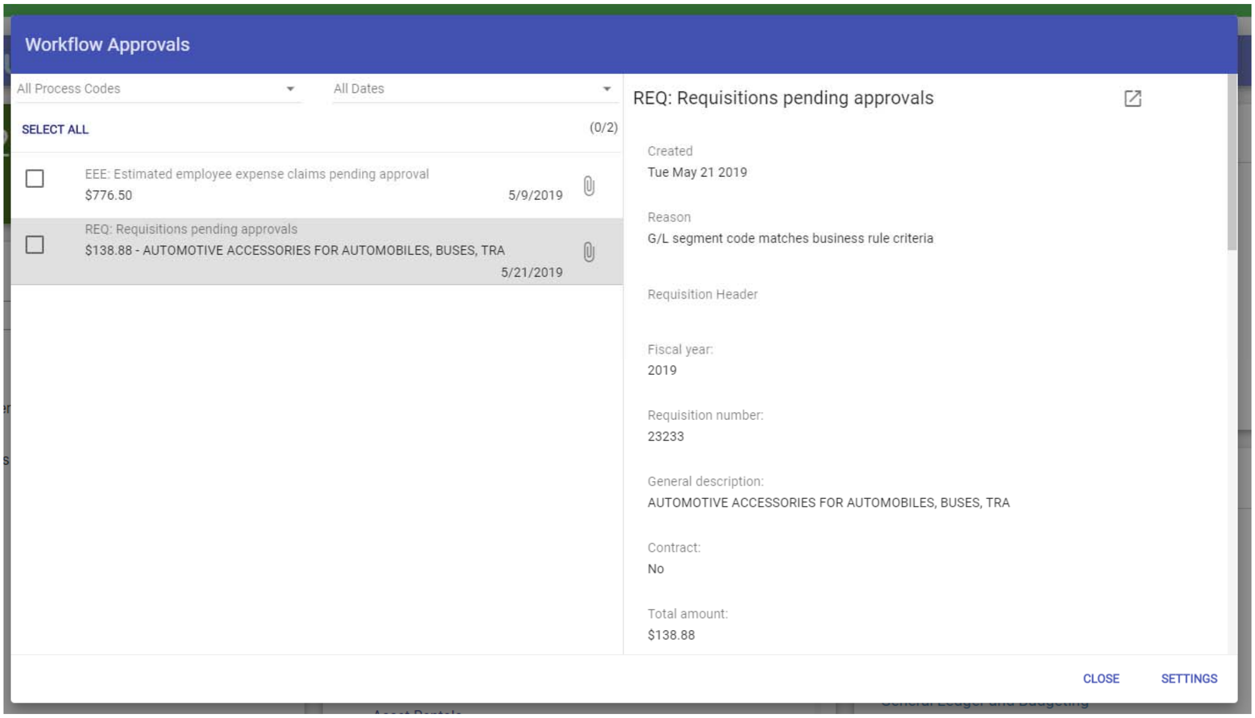
1. Go to your **Tyler Hub page**. It is recommended to use the **Clayton Munis Landing Page.**



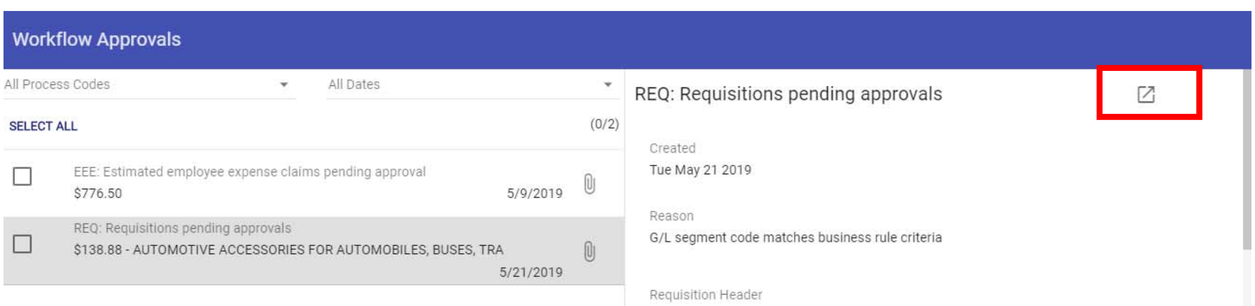
2. Click on the **Approvals tile** to view your pending approvals.



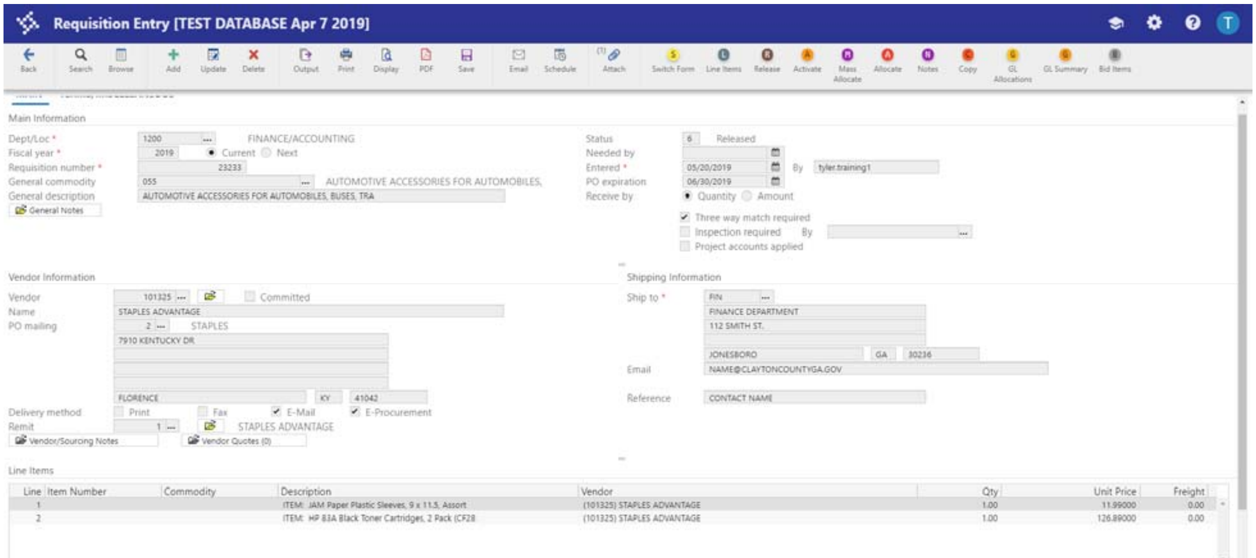
3. A window will display that lists the requests pending your approval in the left panel. You can choose to view them by date or by process code (which defines the type of document). When you click on a **REQ – Requisition Approvals** item in the left panel, details regarding the requisition will be displayed in the right panel.



4. To view additional details, click on the go to icon.

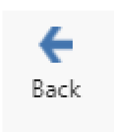


5. A separate window will open displaying the Requisition.

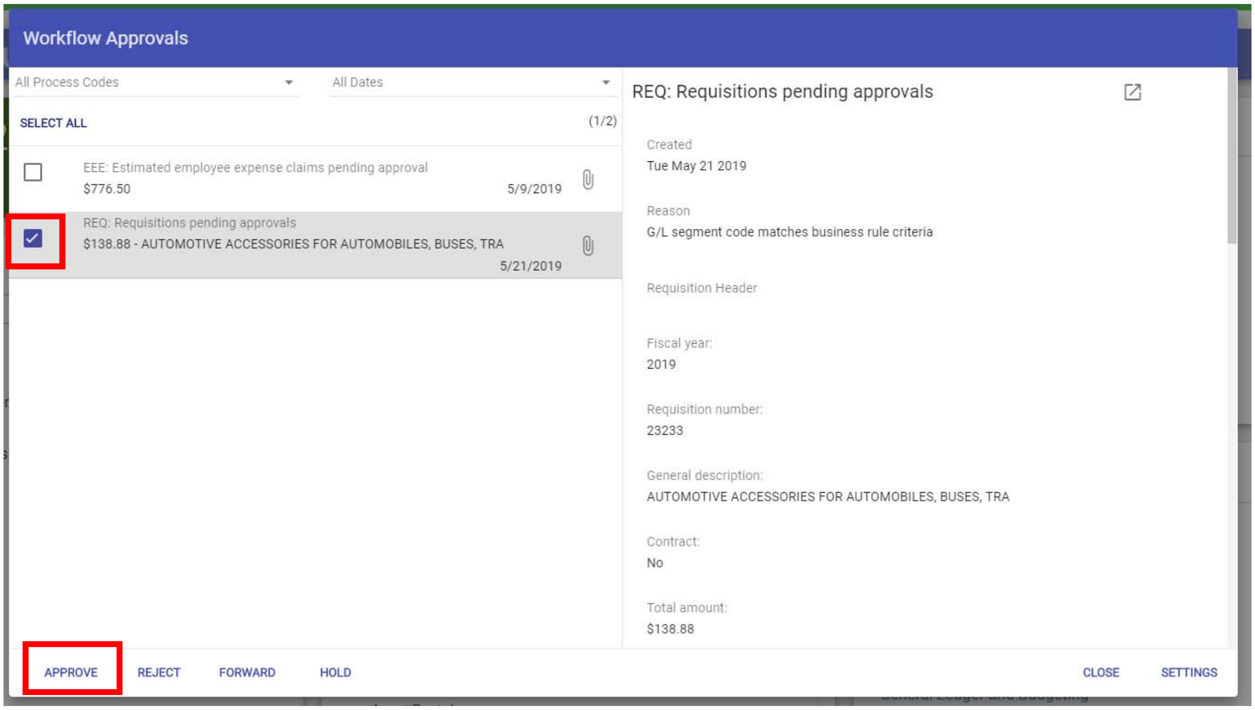


6. Review the requested requisition line items. Click on the **Attachments** icon to verify that the supporting documents have been attached.

7. Click on the **Back** button when you are done reviewing the requisition.



8. To approve go back to Approvals tile and place check mark on the pending action waiting for approval.



9. A series of buttons will display at the bottom of the window. Select if you would like to Approve, Reject, Forward or Hold the requisition and then click OK.

   a) **Approve** – Approves the transaction and moves the requisition on to the next approver. If you are the last approver, then the requisition will be updated a status of Approved. The approved requisition will then need to be converted to a Purchase Order by purchasing staff.

   b) **Reject** – Rejects the transaction and requires that you enter a note for the requestor. The note must indicate the reason for rejection and can assist the originator in determining the next course of action; an alteration and resubmission, or a deletion from the system.

   c) **Forward** – Forwards the requisition to another Munis user for review. You must enter the Munis username for the person that you are forwarding the requisition to.

   d) **Hold** – Keeps the transaction record in your approval queue for additional review. The requisition will remain in the Hold status until further action is taken. This option requires that you enter a note to be sent to the originator. The note must indicate the reason for rejection and can assist the originator in determining the next course of action; an alteration and resubmission, or a deletion from the system.

10. Click **Approve.** APPROVE to approve the requisition**.** Comments may be entered if desired.

11. Click **Submit**. SUBMIT