# Enterprise ERP (Munis) System Administration (MSA-1)

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### Overview

This document outlines some of the basic Enterprise ERP(EERP/Munis) system administration functions required for the operation of EERP. This document addresses only EERP system administration tasks. Additional information can be found by selecting the question mark (?) in the upper right-hand corner of the program.

The following topics are addressed in this document:

- 1. Configuring Basic EERP Settings
- 2. Setting Up EERP Users
- 3. Setting Up Roles and Role Maintenance
- 4. Setting Up Advanced User Permissions

## **EERP System Settings**

The System Settings maintains system wide parameters for the EERP system. The information can be used to configure the software to your software platform. It includes the following items:

- Operating system
- Program path
- Spool (Saved) path
- Installed programs

#### WARNING! Changes to this table should be made only at the direction of the EERP Help Desk.

Select: System Administration > General Administration > System Settings

Client Information Tab												
🐝 System	Settings	[KDE	TEST	02/(	03]							
Close Update	⊖ Output	erint	O Display	PDF	Save	E Email Overrid Configuratio		A Application Storage	Test E-mail	Push Notification Settings		
-	System Settings [KDE   TEST   02/03]											
Munis access  Munis Acces  Secure Views		) )					ß					
Client Information System Settings Miscellaneous Settings Email Window Titles Analytics												
Client name / addr	ess		Ū				·					
Client name / addr	ess KDE   TES	Г   02/03										
Name *	KDE   TES											
Name * Address 1	KDE   TES											
Name * Address 1 Address 2	KDE   TES 300 Sower		3									
Name * Address 1 Address 2 City *	KDE   TES 300 Sower Frankfort	Blvd	3									
Name * Address 1 Address 2 City * State / Province *	KDE   TES 300 Sower Frankfort KY	Blvd Kentuc	3									
Name * Address 1 Address 2 City * State / Province * ZIP / Postal code	KDE   TES'           300 Sower           Frankfort           KY           40601           US	Blvd Kentuc	3 sky									

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information about these fields.

System Settings 7	Гар				
Client Information	System Settings	Miscellaneous Settings	Email	Window Titles	Analytics
General		-			
Munis(R) Version 2021.11 (202	21.11.0.534)				
License number:					
Utility Billing information string	: UB,N				
Auditing					
Default query count audit thres	hold				
Admin email address for query	notices				
Idle program settings					
Prior to timeout, show a timeou	alert for 2 hours	•			

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information about these fields.

Miscellaneous Settings Tab	M	iscel	laneous	Settings	Tab
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Client Information	System Settings	Miscellaneous Settings	Email	Window Titles	Analytics
Fiscal month labels					
JUI - AUG SEP C	CT NOV DEC J	AN FEB MAR APR MAY	JUN		
Account entity codes					
Use account entity code rea	strictions				
Entity code 1 is available to					
Entity code 2 is available to					
Entity code 3 is shared					
Other codes					
County code	FRANKLIN				
District code	KDE				
Budget unit code	COUNTY EMPLOYEES	RETIREMENT			

Misc. Settings Fields	Misc. Settings Field Description
County Code	Already established. No entry is necessary.
District Code	District Number and description used for state-wide reports.
Budget Unit Code	District identifier and description used for CERS reports.

#### Updating District # in the EERP System Settings

District # identifies your district on reports. Before producing these files, the district # must be accurate in EERP. <u>Changes to this table should be made only at the direction of the Enterprise</u> <u>ERP Help Desk.</u>

**Select:** System Administration > General Administration > System Settings

- 1. Select Update.
- 2. Click on the Miscellaneous Settings tab.
- 3. Update **DISTRICT Code** and **Description** with the correct values.

E m	il		h
Εm	ายเ	Ы	[)
		 9	$\sim$

Client Information	System Settings	Miscellaneous Settin	gs Email	Window Titles	Analytics	
Outgoing email settings						
Communicate directly with	the mail server using the SM	TP protocol				
Drop email in a pickup dire	ctory that the mail server will	monitor				
Use the MSGraph REST AP	I to send mail					
SMTP server					SMTP Port	25
	Make SMTP conne	ections secure using SSL/TLS	?			
	Authenticate with	this SMTP server?				
	SMTP server user I	D				
			Set or change S	MTP password	A password is on	file.
	SMTP credentials e			and publicity		
			ld Reminder			
SMTP pickup directory						
Admin email address	donotreply(					
HR admin email address						
AT admin email address						
BCC email address						
Audit email messages	Never	•				
Retry failed messages	0					
E-mail server timeout	4					
E-mail environment message						
E-mail address delimiter	Use a semicolon to	delimit e-mail addesses	in messages		•	

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information about these fields.

Windows Titles Tab
--------------------

Client Inf	ormation	System Settings	Miscellaneous Settings	Email	Window Titles	s Analytics
Customizing	program windov	v titles				
Append c	ustom text to prin	nary window titles				
Text	[_CLIENT_NA	ME_]				
Example:	Primary Window	/ Title [KDE   TEST   02/03]				
Append c Text Example:	ustom text to sec	ondary window titles (does n	ot apply to dialog boxes)			
Note: when ent	ering the custom	text above, the following can	be used as placeholders:			
_CLIENT_N	AME_ = Client	name from System Sett	ings			
_USER_ID_	= ID of	the user running the p	rogram			
_USER_NAM	E_ = Name o	f the user running the	program			

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information about these fields.

### EERP Menu Maintenance

Menu File Maintenance is used to:

- Create new EERP menus or alter the delivered menus.
- Create a global effect (i.e., any update made to the menu files will change the look and feel of a given menu for all users who have access to it.).
- WARNING! Software releases and updates will override any changes made to EERP provided menus. Menus created by the District will remain after applying updates. If you alter the standard EERP menu structure, it is your responsibility to reconfigure the menus after the updates. It is recommended that you print/store a copy of the menus, and then reconfigure the menus after the release/update is completed.

#### **Select:** System Administration > General Admin > Menu Settings

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information about adding a menu and the fields.

The following is a sample EERP Menu Maintenance screen:

× ^	Menu Set	ttings [KDE   TEST   0	2/03]					
X lose	✓ Accept	Q H + Seerch Browse Add	Update Output Print	Display PDF Sar				
	ı Design	TEST   02/03] Base Menu Settings -	Specific Menu Setti	ings				
	main	··· Caption * Munis M	Main Menu		··· Master Menu			
Ch	Hide Char	Туре	Menu ID	n/a	Caption	Allow Access	Date Added	Master Entry
		M - Menu	acbdmain		Financials	Yes		
		M - Menu M - Menu	acbdmain hrmain		Financials Human Capital Management			-
						Yes		
;		M - Menu	hrmain		Human Capital Management	Yes Yes		✓ ✓
		M - Menu M - Menu	hrmain grvmain		Human Capital Management General Revenues	Yes Yes Yes	03/08/2022	
		M - Menu M - Menu M - Menu	hrmain grvmain prvmain		Human Capital Management General Revenues Property Revenues	Yes Yes Yes Yes		
		M - Menu M - Menu M - Menu M - Menu	hrmain grvmain prvmain wmmain		Human Capital Management General Revenues Property Revenues Asset Maintenance	Yes Yes Yes Yes Yes		
		M - Menu M - Menu M - Menu M - Menu M - Menu	hrmain grvmain prvmain wmmain miscmain		Human Capital Management General Revenues Property Revenues Asset Maintenance Other Applications	Yes Yes Yes Yes Yes Yes		
		M - Menu M - Menu M - Menu M - Menu M - Menu M - Menu	hrmain grvmain prvmain wmmain miscmain deptmain		Human Capital Management General Revenues Property Revenues Asset Maintenance Other Applications Departmental Functions	Yes Yes Yes Yes Yes Yes Yes		

#### Create a New/Custom EERP Menu

You can create custom menus within EERP to group together various programs all under one menu. An example would be for payment entry clerks who need to access ONLY these programs: Payment Entry, Bill Inquiry, and Customers. Since these programs are all found on different menus in EERP, let's put them all on one menu.

Start by locating the menus names and their corresponding program names that the clerks will need. Click through the existing menu tree to locate the program names found under the Menu ID column.

#### To Access Menu Maintenance, Select:

System Administration > General Administration > Menu Settings

#### Example:

Menu Name	Program Name
Payment Entry	arcshrct
Bill Inquiry	arbilinq
Customer	arcstmnt (Inquiry Mode Only)

Now, build a custom menu with only those programs on it. To do this click **ADD** and enter information into the Current Menu fields.

• **Menu ID** = Give it a meaningful Menu name like, "pmtclerk" (8 characters or less)

- **Caption** = Put in a meaningful caption for the new menu like, "Payment Clerk Menu".
- Click Accept

#### *In the program/menu listing enter:*

- **Type** = I: MUNIS Application (for all these menus).
- **Program ID** = the program name from above: "arcshrct" for the first line, "arbilinq" for the next, etc. *Note, you can also select the Field Helper drop down menu to search for programs.*
- **Caption** = Leave as-is so if you have a problem, it is easier for EERP support to diagnose.
- Access = Checked. This just indicates that it is available for anyone to see if using this menu.

Tab through all the fields and enter a different program on each line. The result is this:

Menu Settings [KDE   TEST   02/03]								
Me	nu Design	Base Menu Settings	Specific Me	nu Settings	L3			
	nt menu D * pmtclerk	Caption * Payme	ent Clerk Menu		Master Menu			
Ch		e Type	Program ID	Parameters	Caption	Allow	Date	Master
A		I - Munis Application	arcshrct		Payment Entry	Access Yes	Added 01/09/2024	Entry
В		I - Munis Application	arbilinq		Bill Inquiry	Yes	01/09/2024	
с		I - Munis Application	arcstmnt		Customers	Yes	01/09/2024	

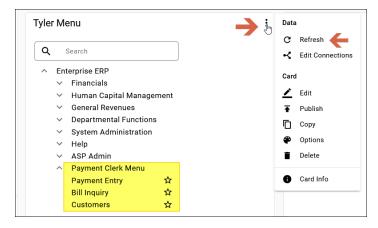
You can now add this new menu (pmtclerk) onto an existing menu like "main" or "armain" within Menu Maintenance.

- Start by finding the 'main' menu then click **Update**. Tab through all the fields until your cursor is in a new field in the "**Type**" column.
- Change the Type from "I MUNIS Application" to "M Menu". The Menu ID is your new custom menu: 'pmtclerk' in our example. The Caption will require a description, and Access should be Yes.

	u Design	Base Menu Set	tings Specific Me	nu octings				
urrent	menu							
lenu ID	* main	··· Caption *	Munis Main Menu		Master Menu			
Ch	Hid Ch	de Type	Menu ID	n/a	Caption	Allow Access	Date Added	Master Entry
А		M - Menu	acbdmain		Financials	Yes		<ul> <li>Image: A set of the set of the</li></ul>
в		M - Menu	hrmain		Human Capital Management	Yes		$\checkmark$
с		M - Menu	grvmain		General Revenues	Yes		$\checkmark$
D		M - Menu	prvmain		Property Revenues	Yes		$\checkmark$
E		M - Menu	wmmain		Asset Maintenance	Yes	03/08/2022	$\checkmark$
F		M - Menu	miscmain		Other Applications	Yes		$\checkmark$
G		M - Menu	deptmain		Departmental Functions	Yes		
н		M - Menu	admnmain		System Administration	Yes		
I		M - Menu	mhelp		Help	Yes		<ul> <li>Image: A second s</li></ul>
J		M - Menu	aspadmin		ASP Admin	Yes		
к		M - Menu	pmtclerk		Payment Clerk Menu	Yes	01/09/2024	

- Click Accept.
- Select **Apply Now** for the changes to take effect.

Now, any user who signs in will see this new menu item on their "main" menu:



Note, users may need to refresh their Tyler Menu by selecting the 3 dots on the right side of the menu and selecting refresh on the menu card.

#### Menu Security

Menu Security is used to control EERP menu access at the **role** level.

1. Open Role Maintenance: System Administration > Security > Roles.

The following is a sample screen showing the menu security set up for a role:

🔆 Roles [KDE   TEST   02/03]							
X Q III + Close Search Browse Add	Update Delete Output Print Displ	PDF Sere Email Schedule View Changes Copy Role					
Roles [KDE   TEST   02/03]							
Role Key *         ACCTSPAY           Description *         Accounts Payable Staff           Menu access         Munis Main menu           Quick link	v -	Role status     Active       Last updated     01/09/2024       at     11:23:35					
Module View Role Permissi	ions Role Data Access M	nu Security Assigned Users (0)	la l				
Financials Accounts Payable Bid Management Budget Contract Management Employee Expense		General       Munis System       Asset Maintenance       Work Orders       Assets	Productivity Tools  Tury Selection  Voter				
Capital Assets	) )	Work Projects					
Inventory     Purchase Orders	]	General Revenues					
Project Accounting     Student Activity     Requisitions	]	Animal Licenses  General Billing  Parking Tickets	Property Revenues Accounts Receivable Business Licenses				
L Items	]	Uvirginia State Income Tax	Central Property  Permits and Code Enforcement				
		HR / Payroll HR Management / Payroll Risk Management Medical Services	Property Tax Administration       Tax Lien       Tax Sale       Utility Billing				

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information.

- 1. Click **Search** to search for a role. Many districts do not have user roles created and the actual roles are named for individual users.
- 2. Click on the Menu Security tab to control EERP menu access at the role level.
- 3. To limit menu access, click the Edit button and select/deselect menu options.

Note: If access is granted to a program within a menu, EERP automatically goes back and grants access to all levels within the menu tree to reach that particular program level. Disable menu options for the user by leaving the access field unmarked. Disabled menu options will not appear on the user's menu screen. Options left check marked will be available to the user.

Role Access	#	Туре	Caption	Prg/Menu	Parameters	Menu Access
✓	А	M - Menu	Financials	acbdmain		Yes
	В	M - Menu	Human Capital Management	hrmain		Yes
	С	M - Menu	General Revenues	grvmain		Yes
	D	M - Menu	Property Revenues	prvmain		Yes
~	Е	M - Menu	Asset Maintenance	wmmain		Yes
~	F	M - Menu	Other Applications	miscmain		Yes
~	G	M - Menu	Departmental Functions	deptmain		Yes
	н	M - Menu	System Administration	admnmain		Yes
~	1	M - Menu	Help	mhelp		Yes
	J	M - Menu	ASP Admin	aspadmin		Yes
~	К	M - Menu	Payment Clerk Menu	pmtclerk		Yes

4. Once all of the menu items and the programs have been selected for the role, click **Accept** to save the changes.

## **NOTE:** If the same restrictions need to be applied to multiple users, complete the restrictions for the first user and copy the record to all others.

#### **Granting User Permissions**

Setting up users is completed through the User Attributes program. Additionally, security is also managed through Role Maintenance.

For more information on how to add or manage users please see **User Account Maintenance** *(MSA- 6)* which may be found in the System and Cloud Administration section on the <u>Enterprise</u> <u>ERP (MUNIS) Support and Guides website.</u>

For more information on how to add or manage roles please see **Role Maintenance (MSA- 7)** which may be found in the System and Cloud Administration section on the <u>Enterprise ERP</u> (MUNIS) Support and Guides website.

#### Maintaining Spool Files (Saved Reports)

Almost all EERP programs provide an **Output** option on the Ribbon with a **Print, Preview, PDF** or **Text File (Spool)** option.

The Output functions can be used to:

- Save files to the spool file/saved report directory.
- Print or preview reports.
- Create a PDF copy of the report

#### Purging Saved Reports

Purging saved reported can be done via the System Administration menu. To Access saved **Text File (Spool)** Functions, Select:

*System Administration >Printer/Device Administration > Saved Reports* 

The following screen is displayed:

Saved Reports [KDE   TEST   02/03]							
X     Q     Image: Close     Print     Display     PDF	Word         Mass Delete Reports         Disclay Reports         Text as PDF         Pint Print Reports         Output List         Open File						
Saved Reports [KDE   TEST   02/03]							
Mode		System administration					
INITIAL MODE		Reset Spool Directory					
Please choose the 'FIND' option to build a list of saved files.							
User ID Report File Name	Report Title 🗸 Date Time	Pages					

Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information.

## NOTE: If the user's "Full Spool File Access" permission is set to No, the user will only see his or her own jobs in the spool file.