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

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Contents

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

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 Tab

Client Information	System Settings	Miscellaneous Settings	Email	Window Titles	Analytics

General

Munis(R) Version 2021.11 (2021.11.0.534)

License number: ▮▮▮▮

Utility Billing information string: UB,N

Auditing

Default query count audit threshold

Admin email address for query notices

Idle program settings

Prior to timeout, show a timeout 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

Client Information	System Settings	Miscellaneous Settings	Email	Window Titles	Analytics

Fiscal month labels

[JUl ▾] [AUG] [SEP] [OCT] [NOV] [DEC] [JAN] [FEB] [MAR] [APR] [MAY] [JUN]

Account entity codes

☐ Use account entity code restrictions

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. ***Changes to this table should be made only at the direction of the Enterprise ERP Help Desk.***

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.

Email Tab

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 Information	System Settings	Miscellaneous Settings	Email	Window Titles	Analytics

Customizing program window titles

☑ Append custom text to primary window titles

Text [_CLIENT_NAME_]

Example: Primary Window Title [KDE | TEST | 02/03]

☐ Append custom text to secondary window titles (does not apply to dialog boxes)

Text

Example: Secondary Window Title

Note: when entering the custom text above, the following can be used as placeholders:

```
_CLIENT_NAME_ = Client name from System Settings
_USER_ID_     = ID of the user running the program
_USER_NAME_   = Name of 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! *S**oftware 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 Settings [KDE	TEST	02/03]										

Menu Settings [KDE | TEST | 02/03]

Menu Design   Base Menu Settings   Specific Menu Settings

Current menu

Menu ID * main   Caption * Munis Main Menu   ☑ Master Menu

Ch	Hide Char	Type	Menu ID	n/a	Caption	Allow Access	Date Added		Master Entry
A	☐	M - Menu	acbdmain		Financials	Yes			☑
B	☐	M - Menu	hrmain		Human Capital Management	Yes			☑
C	☐	M - Menu	grvmain		General Revenues	Yes			☑
D	☐	M - Menu	prvmain		Property Revenues	Yes			☑
E	☐	M - Menu	wmmain		Asset Maintenance	Yes	03/08/2022		☑
F	☐	M - Menu	miscmain		Other Applications	Yes			☑
G	☐	M - Menu	deptmain		Departmental Functions	Yes			☑
H	☐	M - Menu	admnmain		System Administration	Yes			☑
I	☐	M - Menu	mhelp		Help	Yes			☑
J	☐	M - Menu	aspadmin		ASP Admin	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:

Ch	Hide Char	Type	Program ID	Parameters	Caption	Allow Access	Date Added		Master Entry
A	☐	I - Munis Application	arcshrct		Payment Entry	Yes	01/09/2024		
B	☐	I - Munis Application	arbilinq		Bill Inquiry	Yes	01/09/2024	☐	
C	☐	I - Munis Application	arcstmnt		Customers	Yes	01/09/2024	☐	

Menu Settings [KDE | TEST | 02/03]
Menu Design Base Menu Settings Specific Menu Settings
Current menu
Menu ID * pmtclerk Caption * Payment Clerk Menu ☐ Master Menu

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.

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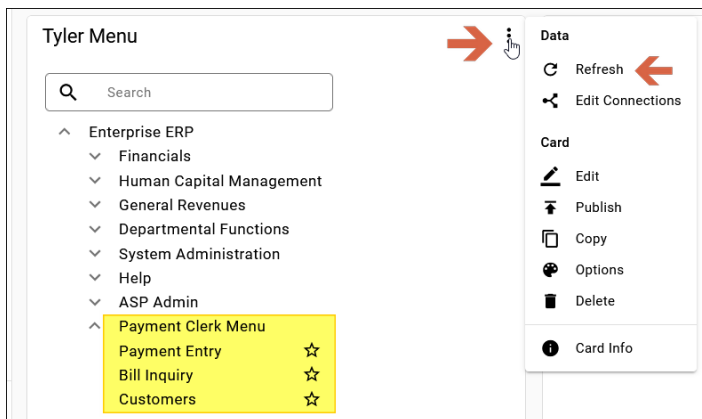
Note, users may need to refresh their Tyler Menu by selecting the 3 dots on the right side of the menu and selecting refresh on the menu card.

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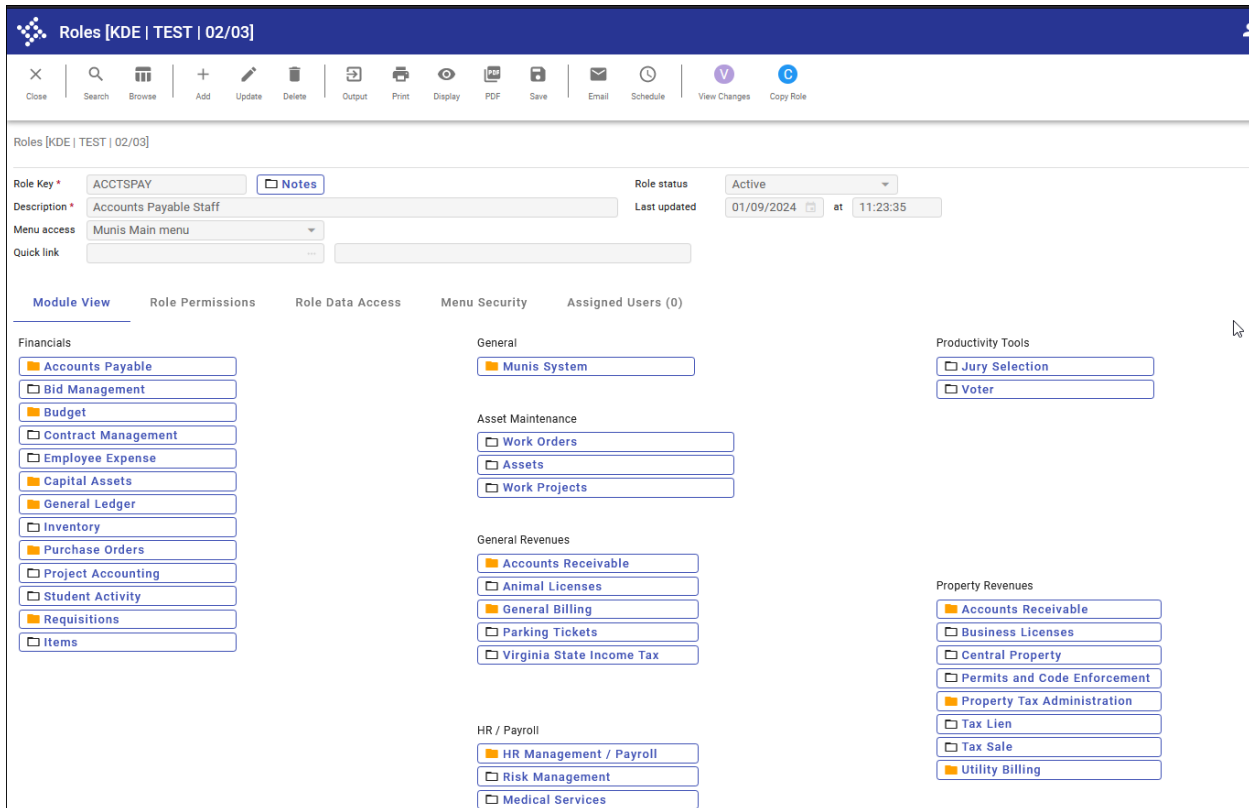
Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information.

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	#	Type	Caption	Prg/Menu	Parameters	Menu Access
✔	A	M - Menu	Financials	acbdmain		Yes
☐	B	M - Menu	Human Capital Management	hrmain		Yes
☐	C	M - Menu	General Revenues	grvmain		Yes
☐	D	M - Menu	Property Revenues	prvmain		Yes
✔	E	M - Menu	Asset Maintenance	wmmain		Yes
✔	F	M - Menu	Other Applications	miscmain		Yes
✔	G	M - Menu	Departmental Functions	deptmain		Yes
☐	H	M - Menu	System Administration	admnmain		Yes
✔	I	M - Menu	Help	mhelp		Yes
☐	J	M - Menu	ASP Admin	aspadmin		Yes
✔	K	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 Enterprise ERP (MUNIS) Support and Guides website.

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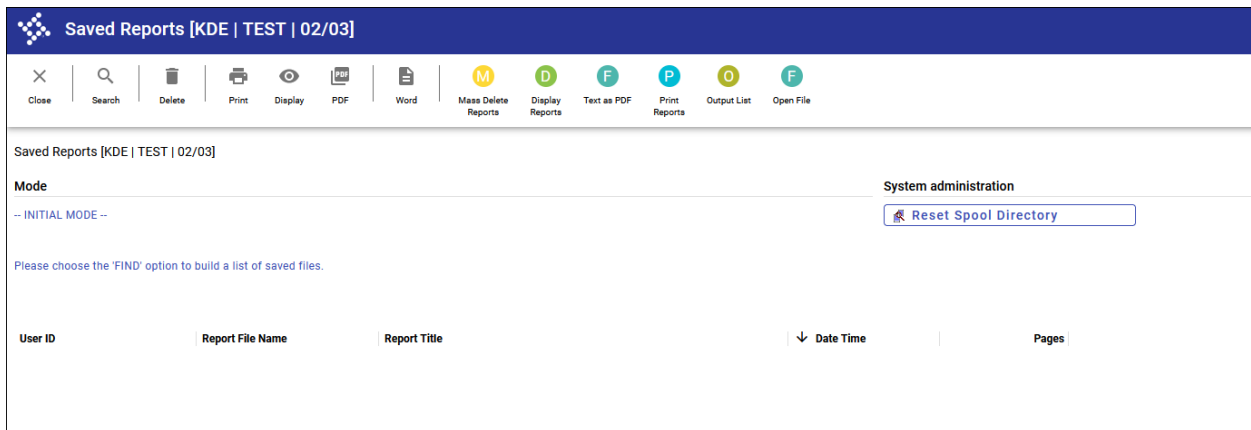
Please select the question mark (?) in the upper right-hand corner of the page and then Help for more information.

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.*