Munis HR System Reference Guide

User Guide for Time Entry Keyers

Updated 8/11/2015

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Revision Chart

The following chart lists the revisions made to this document. Use this to describe the changes or additions made to the document each time it is re-published (draft or final). The description should summarize the changes as possible.

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<tr>
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<th>Author</th>
<th>Description of Changes</th>
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<td>10/24/2014</td>
<td>K. Coonfield</td>
<td>Update to Include Employee Inquiry section</td>
</tr>
<tr>
<td>03/2015</td>
<td>J. Melton</td>
<td>Updated PA Comment section, Added Correcting and Deleting PA sections</td>
</tr>
<tr>
<td>8/15/2015</td>
<td>J. Crimm</td>
<td>Updating PA changes to Effective Date and Expected Return Date</td>
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Munis for Time Entry Keyers

Munis is the web-based tool that allows Time Entry Keyers to view and retrieve specified employee information as well as enter Personnel Actions (PAs) for their department or locations’ employees.

Logging into Munis
Once you have completed the normal log in to your computer, click Internet Explorer and type in the following Munis address: https://munis.cobbk12.org in the browser. It is highly recommended that you save this address to your Favorites Bar.

Saving to Favorites
Right click anywhere on the Munis screen, then click Add to Favorites. Next, in the Name field type in the title you would like to name this shortcut. Then, in the Create In drop down menu select Favorites Bar and click Add.

Munis Dashboard
The Dashboard is easy to navigate as a Time Entry Keyer. You will have access to view basic employee information and enter Personnel Actions.
**Profile Setting**

1. **Click** on the **Profile** button

![Profile Button](image1)

2. **From the Drop down Select** the profile that you would like:
   a. **Use GDC: Genero Desktop Client** for PA’s
   b. **Use Genero Web Client/Silverlight** for exporting excel lists

![Profile Selection](image2)

3. **Click OK.** The **Success** box will appear indicating the “User Profile successfully updated.”

![Success Message](image3)
4. Click the \( x \) in the top-right corner of the Success box to close that window.

**Menu**

The Menu tab on the navigation panel allows you to access the applications pertinent to your position.

As a Time Entry Keyer you will only have access to the **Human Resources/Payroll** application. This application will help you obtain specific employee information when needed.

Within the **Human Resources/Payroll** application, there are several areas to help locate information on an individual employee or obtain a customized list of your employees.
The following four areas listed under **Employee Job/ Pay Classification** contain pertinent information on your employees.

1. *Employee Inquiry* – view basic employee data including base pay
2. *Employee Master* – view basic employee data
3. *Personnel Actions* – enter long term medical leave
4. *Leave/Absence Management* – view short term leave data

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**Basic Navigation to Identify Employee Information**
There are several ways to search (find) existing employee records within Munis.

1. Most common, click **Find** on the top toolbar, complete one of the top fields: Employee #, SSN or Last Name and click **Accept** to view the information on the specified employee.

2. If you click **Find**, leave all of the fields blank, and then click **Accept**, you create an active set of ALL records stored for that table. *This could include Active and Non-active employees. To select only Active employees, click ‘A-Active’ under **Status**, then .*

3. For the most efficient search, be sure to complete the key or required fields on the screen identified by **boldface** labels.

4. You can also refine your search criteria or substitute for unknown values by using the *asteric symbol.

The **Toolbar** at the top of the screen allows users to select from different active icons to view and create different types of employee reports. **Icons are only available (active) when highlighted.**
Tip:
Right-click inside the Toolbar and click "Enable Text" from the drop down menu. This allows you to see the name of each icon.

Note:
The Job Information is only for an employee’s Primary Job. If they have multiple jobs, those won’t be listed in the search.

**Employee Inquiry**

The **Employee Inquiry** screen allows you to search and view information on one of your employees or obtain a full list of your current employees.

The information found on the Employee Inquiry screen includes E#, SSN, (Primary) Job Information, Pay Frequency, Home Address, Base Pay, Hire Date, and other important dates that may assist you in your role as a Time Entry Keyer.

Find Employee Base Pay information

Click the **Menu** tab on the Navigation Panel
Click **Human Resources/Payroll**

Click **Human Resources**

Under **Employee Job/Pay Classification**, Click **Employee Inquiry**

Click the **Find** button on the top toolbar

Type in the 6 digit Employee ID # in the blue shaded box under Employee or Type in the Last Name and First Name in the applicable boxes or Type in the SSN # - Enter in XXX-XX-XXXX format with dashes

Press Enter or click the Accept button.

The **Employee Master File Inquiry** screen shown below has information tabs that contain different types of employee data including home address and base pay.

Click the **Base Pay** tab to view hourly and daily rates for the employee.
Note:

The Job Information and Base Pay seen on this screen ONLY reflect the employees’ Primary Job.

If they have multiple jobs, those additional jobs and rates will NOT be included in any of the information shown on this screen.

Create Employee List including Addresses and Base Pay Information
Click the Menu tab on the Navigation Panel
Click **Human Resources/Payroll**
Click **Human Resources**
Under **Employee Job/Pay Classification**, Click **Employee Inquiry**

Click the **Find** button on the top toolbar

Under **Status**, click **A-Active** from the drop down menu

Your location should be reflected under **Location**

Press Enter or click the **Accept** button

**Confirm Record Set** screen appears. Click **Yes, Continue** to pull your employee records.

You will then be able to view all of your employees based on the search criteria you entered.

Click the **Excel** icon located on the top Toolbar to export the records to an Excel spreadsheet.

You can also scroll through the list by clicking on the navigation bar at the bottom of the screen before you export the list if you like.
The Export Selection screen will appear.

Once the export has completed, the Export Filter screen will appear.

This screen allows you to customize the Fields of information you would like exported to Excel.
1. Click **Select None** button. This will clear all of the pre-checked fields.

2. Click the boxes for the individual **Fields** you would like included in your Excel spreadsheet.

(Note the **Hints** given on the right-hand side of the screen to help select or unselect the fields of information you would like.)

Typically school locations want to include the following in their report:

- Employee Name
- Job Class Description
- Group/BU Desc
- Pay Frequency Description
- Hire Date
- Home Address 1, Home City 1, Home State 1, Home Zip 1
- Home Phone, Phone Number 1 (cell)
- Pay Hourly Rate
- Pay Daily Rate

Once you have checked the boxes for the export filter Fields, click the green **Accept** button.

In a few moments, an Excel spreadsheet will open including all of the data you requested.
You can sort, hide or delete columns, and further customize the spreadsheet to fit your specific needs.

Click **File, Save As**, type in the **File Name** you would like to identify this report by and select the location where you would like this report secured on your computer. For example, you could name the file "Employee List Oct 2014" and save it to a **secure** location on your computer.

*As a reminder, Time Entry Keyers have a responsibility to ensure the safety and integrity of the data they are responsible for handling.*
Employee Master

The Employee Master screen allows you to search and view information on one of your employees or obtain a full list of your current employees with basic information. Note Base Pay is not included on this screen. Base Pay is located in the Employee Inquiry screen.

The information found on the Employee Master screen includes E#, SSN, (Primary) Job Information, Pay Frequency, Address, Dates, and other basic information that may assist you in your role as a Time Entry Keyer.

Click the Menu tab on the Navigation Panel

Click Human Resources/Payroll

Click Human Resources

Under Employee Job/Pay Classification, Click Employee Master

Find Employee by E#, Name or SSN from Employee Master screen

Click the Find button on the top toolbar

Type in the 6 digit Employee ID # in the blue shaded box under Employee

or Type in the Last Name and First Name in the applicable boxes

or Type in the SSN # - Enter in XXX-XX-XXXX format with dashes

Press Enter or click the Accept button
The **Information Tabs** shown in the **Employee Master** screen include the following employee data:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main</strong></td>
<td>Job Class, Location, <strong>Pay Frequency</strong>, Primary G/L, Personnel Status</td>
</tr>
<tr>
<td><strong>Dates</strong></td>
<td>Hire, Service, Orig Hire</td>
</tr>
<tr>
<td><strong>Demographics</strong></td>
<td>Gender, <strong>Badge ID</strong> #, EEO Information</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>Home Address, Phone #, Email Address, Additional Information</td>
</tr>
<tr>
<td><strong>Payroll</strong></td>
<td>Run Type, Advice Delivery, W-2 Delivery</td>
</tr>
<tr>
<td><strong>Last Change</strong></td>
<td>User, Date and Time of last change made to employee record</td>
</tr>
<tr>
<td><strong>Benefits FTEs</strong></td>
<td>Benefit Type</td>
</tr>
</tbody>
</table>
Find List of Employees for your Location using Employee Master screen

Click the **Find** button. Next, you can click on one or more of the available drop down menus located under **Status, Pay Frequency, and Personnel Status** to help isolate the employees you want to identify.

Most frequently you will select **A-ACTIVE** under the **Status** field to identify all of your active employees.

![Employee Master Screen](image)

Then click the **Accept** button. You will receive a confirmation message referencing the number of records that match your search criteria.

Click **Yes, Continue**.
The number of employee records retrieved will be identified at the bottom of the screen.

You can view each record one at a time by scrolling on the navigation bar.

You can click the **Browse** button on the bottom navigation bar to view the entire list in a table format.
Employee List from Employee Master - Table format

This list may include former employees or recently retired employees until HR and payroll have completed the necessary steps to remove or deactivate them.

Export to Excel

This table will be in a spreadsheet format allowing you to sort the data, view or hide columns, export to an Excel or Word file, or filter the data to create a more specific data set.

You can SAVE the report to your desktop or other local file so you can retain and view for later use.

As a reminder, Time Entry Keyers have a responsibility to ensure the safety and integrity of the data they are responsible for handling.
Creating Basic MUNIS Reports to view or print

You can create Munis reports by searching for records and then using the toolbar icons (Display, PDF, Print or Save) to view, print, or save the report.

The basic Munis reports are standard reports that cannot be manipulated, filtered, etc. like with an Excel spreadsheet. However, if the Word or Excel buttons are active within the program, you can also export the report to a Microsoft Word document or Microsoft Excel spreadsheet.

Click the Display icon from the top toolbar once you have identified the active record(s). The pop-up screen below will appear to allow you to select the Report Type option. Select the option and click OK. In this example, Employee List was chosen.

Next, you will select the Sort Order. In this example, Employee Name was chosen. Then click OK.
The following Munis report will appear on the screen. Click **File** to either print or save.

As a reminder, **Time Entry Keyers have a responsibility to ensure the safety and integrity of the data they are responsible for handling.**
Leave /Absence Management

You can obtain short term leave information on your employees within Munis under the Human Resources application. This area is beneficial in identifying the available sick leave an employee has which is needed when you enter a Personnel Action.

Identify an Employee's Available Short Term Leave (Employee Accruals)

Click Leave/Absence Management, Click Employee Accruals

Click on the Find button and then type in the Employee # or Last Name, and press Enter

The Employee Accrual screen will appear.

The Type and Available fields on this screen identify each of the leave types and the respective # of HOURS available for that specific leave type as of the last pay period.

You can view each of the applicable leave types by clicking on the navigation bar at the bottom of the screen.
In the above example, the available sick leave is 169.875 HOURS. Note all short term balances are reflected in HOURS not days.
**Personnel Actions – Leave of Absences**

Secretaries are asked to submit a Munis Personnel Action (PA) to notify the Benefits Office of any employee requesting time off to care for themselves or an immediate family member for a specific period of time. The leave of absence notification PA must be completed accurately and released in a timely manner to allow the Leave of Absence group to respond to the employees’ inquiry.

Additional information pertaining to the Family Medical Leave Act can be found at the end of this section as well as contacting the Benefits Office.

*Due to HIPAA and other laws, which protect the confidentiality of medical information, secretaries should not ask specific questions regarding the leave request. If the employee offers details, note the information in the Comment section of the Personnel Action (PA).*

**Initiating Family Medical Leave of Absence Request**

Employees who desire to apply for Family Medical Leave (FMLA) should contact their school or department secretary who will initiate a Personnel Action.

a) The application should be submitted thirty days prior to the beginning of the leave when reasonable advance planning is possible;

b) Family Medical Leave begins the first day that the employee is absent from work due to the qualifying condition;

c) If 30-day notification is not provided for a foreseeable leave, the District may delay the start of the leave.

The FMLA provides that an employer may require an employee seeking leave under the FMLA to provide sufficient facts to support the request for leave. The Benefits Office will provide the employee requesting leave with designated documents which must be completed and received back in the Benefits Office BEFORE the employee may retain the benefit of FMLA-protected leave. Failure to do so may result in a denial of the employee’s FMLA request. FMLA applicants have fifteen calendar days to return forms to the District. Employees will receive written FMLA approval confirmation from the Benefits Office.
Notification Process for Leave of Absences

In order to enter a Personnel Action (PA), you must first identify the available sick leave the employee may have. You can obtain this information within Munis in **Employee Accruals** under **Leave/Absence Management** or in the CTMS payroll system.

Once you have identified the available Sick hours from Munis or CTMS, you will need to determine the actual available hours needed to enter on the PA. The actual available hours can be identified by deducting any sick leave that has not been entered as of today (ex. Report of absence forms that may be sitting on your desk and yet to be entered) from the # you obtained from the Employee Accrual screen or CTMS.

For example, if you have a Report of Absence for 8 hours that has not been entered into the payroll system yet, you will need to deduct those 8 hours from the figure you just obtained from Munis or CTMS. *That final number of hours is needed for entering the PA.*

Enter Personnel Action to notify Benefits Office

Entering the PA includes three important steps which *must be in this order:*

1. Typing in pertinent information in the specified fields per instructions below
2. Printing the Personnel Action (PA) report
3. Clicking the **RELEASE** button which sends the PA notification to Benefits

**Note:** *You will need the employee’s 6 digit E # to begin the PA entry.*

Select **Personnel Actions** under the Human Resources application then click **Actions Entry.**
1. Click the green plus icon from the top menu to Add the Record.

You will automatically be taken to the Main tab.

**Note:** There are two tabs on this screen that you have to input information- Main and Other.

2. The EMPLOYEE (blue box) field will now be active. Enter the 6 digit EMPLOYEE # and tab to populate the employee's last and first name.

3. In the EFFECTIVE DATE field, Type in the date of the first day that the employee is expected to be on leave.

4. Tab to ACTION CODE field and select 300 – Leave Notification from the drop down menu.

5. Tab to REASON/AUTH CODE field and select 3000 – Leave Notify Benefits from the drop down menu.

6. Tab to the COMMENT field. **Note:** this field has limited space for entering data. **The following is the requested information:**
➢ the Type of Leave of absence
➢ Expected Effective Date of Leave of Absence
➢ Amount of Available Sick Time (# of hours retrieved from Munis or CTMS minus any pending leave not already entered)

Please use the following (noted in bold font) in the Comment section for each type of leave:

**Personal Illness:**

PER ILL EFFDT (employee's first day out) **xx/xx/xx SL** (# of hrs) **xx.x**
If Leave requested is Intermittent, please note as such **INTERMT**

**Family Illness:**

FAM ILL (SPOUSE, PARENT, SON, DAUGH, if known) EFFDT (employee's first day out) **xx/xx/xx SL** (# of hrs) **xx.x**
If Leave requested is Intermittent, please note as such **INTERMT**

**Maternity Leave:**

MAT LV EFFDT (use due date) **xx/xx/xx SL** (# of hrs) **xx.x**

Comment Example: **MAT LV EFFDT 11/15/14 SL 161.87**
7. Click the **OTHER TAB**

![Image of Personnel Action Entry with labeled fields]

8. Tab to **LEAVE LENGTH** field and enter the length of the leave (ex. 2 WEEKS). If unknown, enter **UNKN**.

9. Tab to **ESTIMATED RETURN** field and enter **12/31/9999**.

10. Click green check icon on the left corner of the screen to **Save the record**.

11. Click the **PDF** icon from the top menu bar to view the Personnel Action Entry Report in PDF format.

12. Click **File** and **Print** or click on the **icon** to print the PA Report for your files. Note the report does not have the employee’s name on it to maintain confidentiality.

13. Click **to close the PA Report screen (CONTINUE TO NEXT PAGE of Instructions)**
14. **File report in locations’ employee Medical or Benefit files which must be secured.**  
*Do not file in personnel files.*

**Finalize PA Notification to Benefits Office (VERY IMPORTANT STEP)**

1. Click the **RELEASE** button in the left menu bar to release the PA into the HR workflow.

![Personnel Action Entry - Menu](image)

2. Release for Approval box appears.

![Release For Approval](image)

3. Click **YES** to approve this action for approval. You have now successfully entered the PA and notified the Benefits Department.

4. Click **X** to close **PERSONNEL ACTION ENTRY** screen.

*Once a PA is released, it will appear on the Benefits group dashboard for processing. The PA will be Approved or Rejected. If the PA is Rejected, an email will be generated back to the person who initiated the PA. There is a section for Comments in the email which will indicate the reason for the*
Rejected PA. In some instances you may need to Delete the PA. In most instances, a correction will need to be processed.

Correcting a Personnel Action (PA)

If you would like to correct a PA that was previously submitted and Rejected, take the following steps:

Note: You will need the employee’s 6 digit E #

Select Personnel Actions under the Human Resources application then click Actions Entry.

1. Click Find icon from the top menu

   The EMPLOYEE (blue box) field will now be active. Enter the 6 digit EMPLOYEE # and press enter to retrieve the PA. Verify the information to ensure that it is the PA that you need to correct.

2. Click Update icon from the top menu. The PA will now be active to process the correction.
3. Make the appropriate corrections.

4. Once the corrections have been made, click the green check icon on the left corner of the screen to **Save** the record.

5. Click the **PDF** icon from the top menu bar to view the Personnel Action Entry Report in PDF format.

6. Click **File** and **Print** or click on the icon to print the PA Report for your files. Note the report does not have the employee’s name on it to maintain confidentiality.

7. Click **X** to close the PA Report screen.
8. File report in locations’ employee Medical or Benefit files which must be secured. 
   Do not file in personnel files.

Finalize Correction Notification to Benefits Office  (VERY IMPORTANT STEP)

1. Click the RELEASE button in the left menu bar to release the PA into the HR workflow.

2. Release for Approval box appears.

3. Click YES to approve this action for approval. You have now successfully corrected the PA and notified the Benefits Department of the Update.

4. Click to close PERSONNEL ACTION ENTRY screen.
Deleting a Personnel Action (PA)

If you would like to delete a PA that was previously submitted and Rejected, take the following steps:

**Note:** You will need the employee’s 6 digit E #

Select **Personnel Actions** under the Human Resources application then click **Actions Entry**.

1. Click **Find** icon from the top menu
2. The **EMPLOYEE** (blue box) field will now be active. Enter the 6 digit **EMPLOYEE #** and tab to retrieve the PA.
3. Click **** to Delete the PA.
4. You will receive a message to confirm Delete. Click Yes, Delete to delete the PA.

Please Note: The following is for information purposes only. FMLA types and approvals will be handled by the Benefits Office.

**Family Medical Leave Act**

Eligible employees (those with one year of service who have worked a minimum of 1250 hours) are entitled to apply for Family and Medical Leave for their own medical condition or that of a qualified family member. Family and Medical Leave is a maximum of 12 weeks of unpaid, approved leave in a 12 month period that provides job, premium and benefits protection for that time period. FMLA may be taken continuously or intermittently.

**Types of Family Medical Leave of Absences:**
- **Maternity** – birth / 1st year to care for child (maximum of 12 weeks)

- **Adoption** - placement with the employee of a child for adoption or foster care, and to care for the newly placed child.

- **Serious Health Condition of Family Member (Family Illness)** – care for mother, father, spouse or minor child.

- **Serious Health Condition of Employee (Personal Illness)** - when the employee is unable to perform the functions of the position due to a medical condition.

- **Qualifying Exigency Leave** – Military Deployment of an employee’s spouse, son, daughter, or parent (the military member or member) to a foreign country.

- **Military Caregiver Leave (Serious Illness/Injury)** - In the case of a current member of the Armed Forces, including a member of the National Guard or Reserves, this means a serious injury or illness that was incurred by the covered service member in the line of duty on active duty in the Armed Forces or that existed before the beginning of the member’s active duty and was aggravated by service in the line of duty on active duty in the Armed Forces, and that may render the member medically unfit to perform the duties of the member’s office, grade, rank or rating. In order to care for a covered service member, an eligible employee must be the spouse, son, daughter, or parent, or next of kin of a covered service member.

- **Intermittent/Reduced Schedule Leave** - Employees are allowed to take leave on an intermittent basis or to work a reduced schedule when medically necessary to care for a seriously ill family member, or because of the employee’s serious health condition.

## Benefits Contacts for Leave of Absences

**Elementary School & Other Employees:**

Jacqueline Melton, Benefits Representative

**Middle and High School & Transportation Employees:**

Sharron Shepheard, Benefits Representative

## Unlawful Acts
FMLA makes it unlawful for any employer to interfere with, restrain, or deny the exercise of any right provided by this law. It is also unlawful for an employer to discharge or discriminate against any individual for opposing any practice, or because of involvement in any proceeding, related to FMLA.

Employers cannot use the taking of FMLA leave as a negative factor in employment actions, such as hiring, promotions, or disciplinary actions; nor can FMLA leave be counted under "no fault" attendance policies.

**Toolbar Reference**

The following table provides descriptions for the Munis toolbar buttons, and applicable shortcuts, if available. If a toolbar button is grayed out, the selection is not available.

<table>
<thead>
<tr>
<th>Image</th>
<th>Keyboard Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Accept" /></td>
<td>Press <strong>Enter</strong></td>
<td>Accept saves information after you have created or updated a record. This button is often highlighted when adding, updating, or searching for records.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td>Press <strong>Esc</strong></td>
<td>Cancel ends an operation, such as adding or updating a record.</td>
</tr>
<tr>
<td><img src="image" alt="Cut" /></td>
<td>Press <strong>Ctrl+X</strong></td>
<td>Cut allows you to remove data from one program or field to use in another.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>Press <strong>Ctrl+C</strong></td>
<td>Copy creates a copy of data in one program or field to use in another.</td>
</tr>
<tr>
<td><img src="image" alt="Paste" /></td>
<td>Press <strong>Ctrl+V</strong></td>
<td>Paste inserts cut or copied data into a field or program.</td>
</tr>
<tr>
<td><img src="image" alt="Find" /></td>
<td>Press <strong>Ctrl+F</strong></td>
<td>Find searches for records in a program. Find 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.</td>
</tr>
<tr>
<td><img src="image" alt="Browse" /></td>
<td>Press <strong>Ctrl+B</strong></td>
<td>Browse is available when an active set of records exists, or after an active set is created using the Find or Define buttons. The browse screen displays a list of all the records in the active set. You can sort, filter, and modify records as needed.</td>
</tr>
<tr>
<td>Action</td>
<td>Press</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Query</td>
<td>Ctrl+Q</td>
<td>Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard screen (similar to the expression builders found in Microsoft Excel or Microsoft Access) allows you to create an expression based on the fields in the active program.</td>
</tr>
<tr>
<td>Add</td>
<td>Ctrl+N</td>
<td>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 defaults. You can move from field-to-field by pressing Tab or by selecting a field with the mouse. 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.</td>
</tr>
<tr>
<td>Update</td>
<td>Ctrl+U</td>
<td>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.</td>
</tr>
<tr>
<td>Delete</td>
<td>Ctrl+D</td>
<td>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.</td>
</tr>
<tr>
<td>Print</td>
<td>Ctrl+P</td>
<td>Print sends a report directly to your default printer. If you choose Output from the File menu, you can select a printer and the number of copies to print.</td>
</tr>
<tr>
<td>Display</td>
<td></td>
<td>Display allows you to immediately view a report on the screen.</td>
</tr>
<tr>
<td>PDF</td>
<td></td>
<td>PDF creates the report in PDF format. The program opens the document in the installed PDF reader. <strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Save</td>
<td></td>
<td>Save 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. You can access Saved Reports by clicking Reports on the My menu or by clicking Saved Reports in the Departmental Functions group of the Munis Application Menu. To use the spool function from the File menu</td>
</tr>
</tbody>
</table>
in a specific program, click Output and then select File under Output Type.

| 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. This functionality does not require Munis Office, but you must have Microsoft Excel 2002 or higher installed on your workstation.  
- 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.  

In each case, the program inserts hyperlinks to the individual Munis records.  
The file created during export is automatically saved in the directory where the Munis software is installed; 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. An additional feature of Microsoft Word Export is Mail Merge. This feature enables you to print professional forms, mailing labels, directories, and so on with user-defined templates. |

| Email | Email creates an e-mail message that contains a hyperlink to the active record. When the e-mail 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. |

| Exchange | Exchange displays the Appointments screen, which allows you to schedule meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an e-mail 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 e-mail recipient accepts the meeting, it is automatically added to his or her Exchange calendar. |

| Attach | Attach allows you to view, add, or delete documentation related to the current record. Once a file is attached, it is copied and stored with the Munis program. 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:** You can also view, add, or delete documentation for the current record by clicking Attachments to the right of the navigation bar on the screen. The number in parentheses indicates the number of documents attached to the record.

| **MapLink** | MapLink allows integration of map data sources with Munis programs. The Web-based version of MapLink is an inquiry-only version. 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. CCSD- will not use it. |
| **Image** | Image opens **Tyler Content Manager for Munis** or Laserfiche®. These options provide content management capability specific to Munis programs. |
| **Favorites** | Favorites adds the current program to the Favorites menu. The Favorites menu is on the My menu and on the main Munis menu. Use the Favorites menu to start or organize programs in your list of favorites. |
| **Munis Enhancements** | Munis Enhancements provides a link to current enhancement notes that are applicable to the active program. This feature is controlled by the Release Administration/Application Enhancements settings on the Site Settings screen of the System Settings program. |
| **KnowledgeBase** | KnowledgeBase accesses the Munis KnowledgeBase application, where you can find and review additional documentation related to the active program. |
| **Munis Help** | Press **F1.** Munis Help accesses the online help content for the active program screen. Online help is screen-level; each screen includes an overview, a Field Descriptions table, a Tasks list, and a Resource table. Some tasks include video tutorials, which provide visual explanations of tasks. |