Munis General Administration, Including Tyler Hub and ReadyForms

Major Enhancements
Munis 2021.4

January 2022

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Munis General Administration

This document provides an overview of the major General Administration enhancements for Munis® 2021.4. In addition to product-specific changes, this document also provides a summary of Tyler Hub and ReadyForms major enhancements that are applicable to Munis.

For each major enhancement, the document provides the Jira number, a brief purpose statement, and the estimated PACE training time. PACE is the Tyler Planned Annual Continuing Education (PACE) program that supports your organization with ongoing education designed to provide your staff with up-to-date training on new features and functions. For more information on PACE for Munis, contact your account representative. When reviewing PACE details, please keep in mind that sessions are scheduled in four-hour increments.

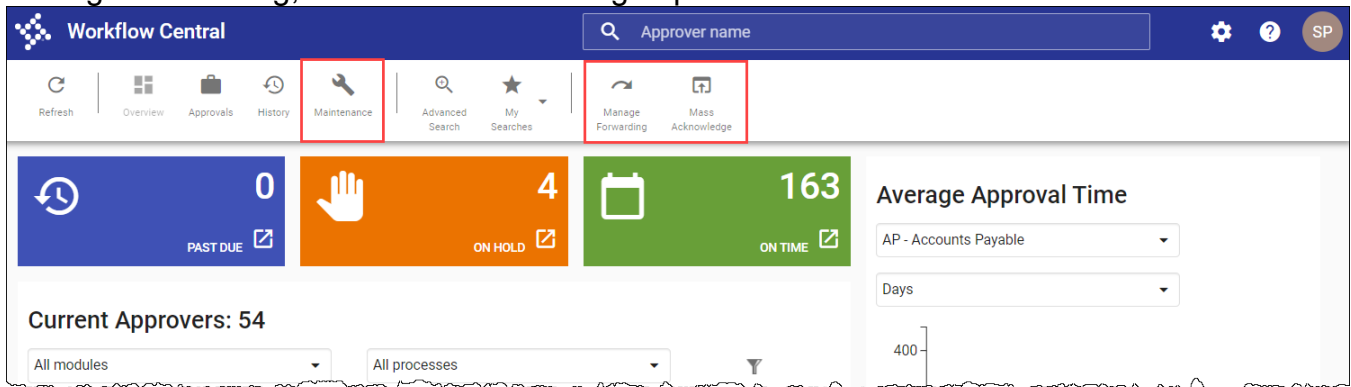## Workflow Central, Munis System Roles

Jira Issue: MUN-425429, MUN-425550
Purpose: To provide inquiry-only capabilities for Workflow Central.
Estimated PACE Training Time: Less than ½ day.
Client Suggestion: Yes
Description: Munis programs for controlling roles, permissions, and user attributes include fields for determining users' view and maintenance capabilities in Workflow Central. Using these settings, you can control access to the actions performed using the Maintenance, Manage Forwarding, and Mass Acknowledge options in Workflow Central.

In Munis System Roles, the Workflow group includes five checkboxes that control users' access to workflow-related functions. The Workflow Process View Access and Workflow Process Maintenance Access settings in the Data Access group determine the user's level of

data access.

The checkboxes in the Workflow group are:
- Maintain Pending Actions (Workflow Supervisor)—Grants users assigned to the role the ability to maintain workflow pending actions in the maintenance program, when selected. This checkbox replaces the Workflow Supervisor checkbox that was formerly available in the General group in this program.
- Allowed to Forward Others' Individual Workflow Items—Grants users assigned to the role the ability to forward individual items waiting for other workflow approvers, when selected. By default, this setting is not selected for new users but is selected for existing users.
- Mass Acknowledge Notifications for Others—Grants users assigned to the role the ability to acknowledge multiple notifications for other workflow approvers at once, when selected. By default, this setting is not selected for new users but is selected for existing users.
- View Global Business Rules—Grants users assigned to the role the ability to view global business rules that are generated in every workflow, when selected. By default, this setting is selected for existing users who have full workflow process access; for all other users, as well as new users, this setting is not selected. When this checkbox is selected, the program makes the Maintain Global Business Rules checkbox available.
- Maintain Global Business Rules—Grants users assigned to the role the ability to maintain global business rules that are generated in every workflow, when selected. By default, this setting is selected for existing users who have full workflow process access; for all other users, as well as new users, this setting is not selected.

In the Data Access group, the Workflow Process Access setting is removed, and two settings are added:
- Workflow Process View Access—Determines what level of view access users assigned to this role have:
  - None—Cannot view workflow process items.

- o Limited—Can view a limited selection of workflow process items. Clicking the folder button displays the Workflow Process View Access screen, where you can define the codes to which the user has access.
  - o Full—Can view all workflow process items.

  By default, this setting works in the same way as the former Workflow Process Access setting.

- Workflow Process Maintenance Access—Determines the level of maintenance access for users assigned to this role:
  - o None—Cannot maintain workflow process items.
  - o Limited—Can maintain a limited selection of workflow process items. Clicking the folder button displays the Workflow Process Maintenance Access screen, where you can define the codes to which the user has access.
  - o Full—Can maintain all workflow process items.

  By default, for new users this setting is set to None. For existing users, this setting matches the value of the Workflow Process View Access setting.

The Workflow Business Rules, Pending Actions, and User Attributes programs are updated to accommodate these changes.

Tyler Hub

Administration

Jira Number: HUB-4864
Purpose: To overwrite user roles and content selections for multiple users at one time.
Client Suggestion: Yes
Estimated PACE Training Time: Less than ½ day.
Description: Mass Assign User Settings includes options for overwriting existing roles and content.

When enabled, the Overwrite Existing Roles and Overwrite Existing Content settings cause the Mass Assign process to replace users' existing roles and content with only those options identified on the Additional Roles and Additional Content lists.

In addition, when a template is selected from the Templates list, any roles or bundles selected from the Roles and Bundles lists are assigned in addition to those roles and bundles associated with the template. Likewise, if a template includes a home page but a home page is also identified using the Home Page list, the page specified on the Home Page list takes precedence.

Card Designer

Jira Number: HUB-4120
Purpose: To prohibit cards from displaying titles.
Estimated PACE Training Time: Less than ½ day.
Description: On the Card Options tab, the Hide Card Title setting determines if the card title displays on the card. When this setting is enabled, the card title does not display.
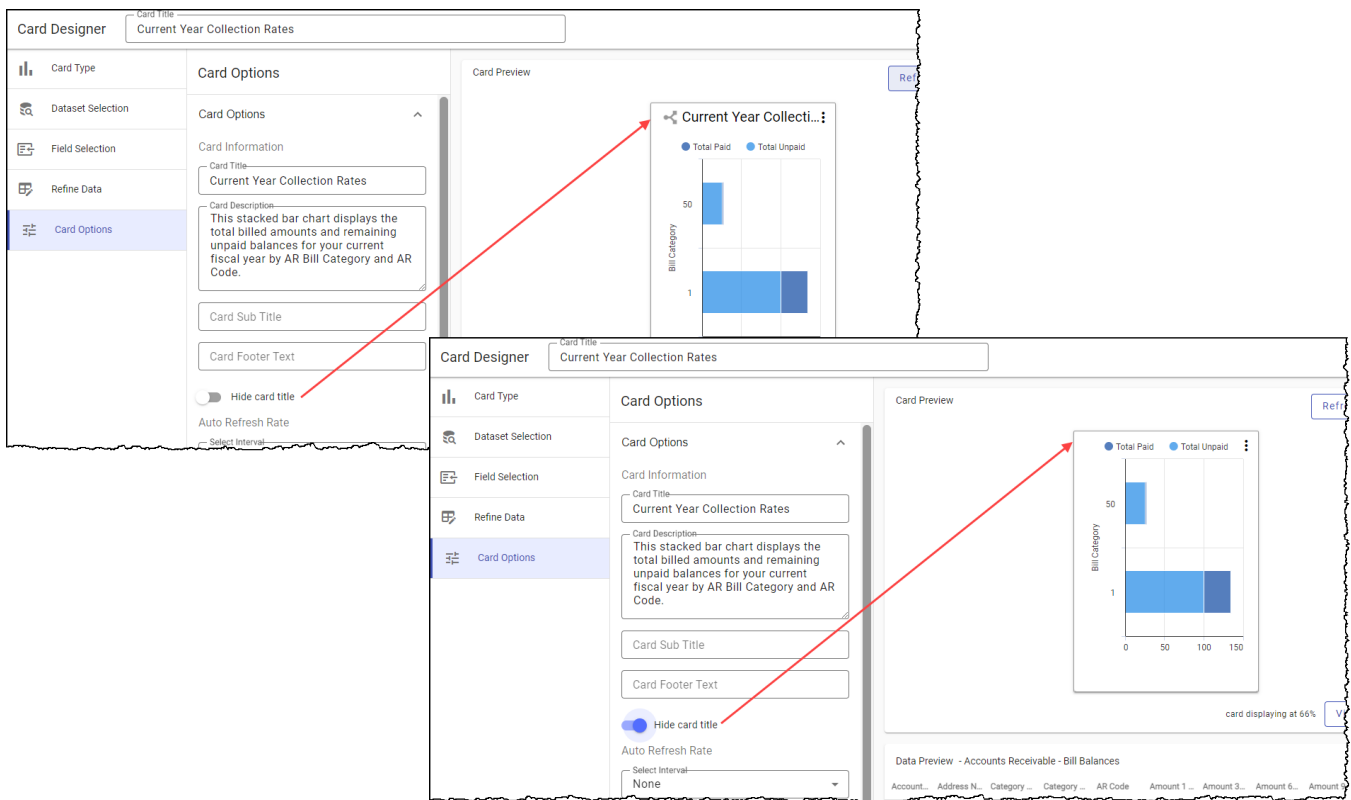
This option is not applicable to count or double-count cards.

Tyler Menu

Jira Number: HUB-4764
Purpose: To prohibit Tyler Hub from displaying menu options for which the user does not have permission to access.
Client Suggestion: Yes
Estimated PACE Training Time: Less than ½ day.
Description: When a user does not have permission to access a Tyler application, Tyler Hub does not include that application in the user's Tyler Menu or Favorites options. For example, if a user does not have permission to access Executive Insights, the Executive Insights menu entry is removed from the Tyler Menu.

When you are editing your favorites or a menu card and you select an application for which you do not have permissions, the selection is not successful.

ReadyForms

General Billing Invoice

Jira Issue: TF-6075
Purpose: To include installment payment information in the General Billing Invoice form.
Estimated PACE Training Time: Less than ½ day.
Description: The Include Installments option is added to the Data Display Options tab for the General Billing Invoice form model. When this option is selected, the GB invoice form displays installment payment information.
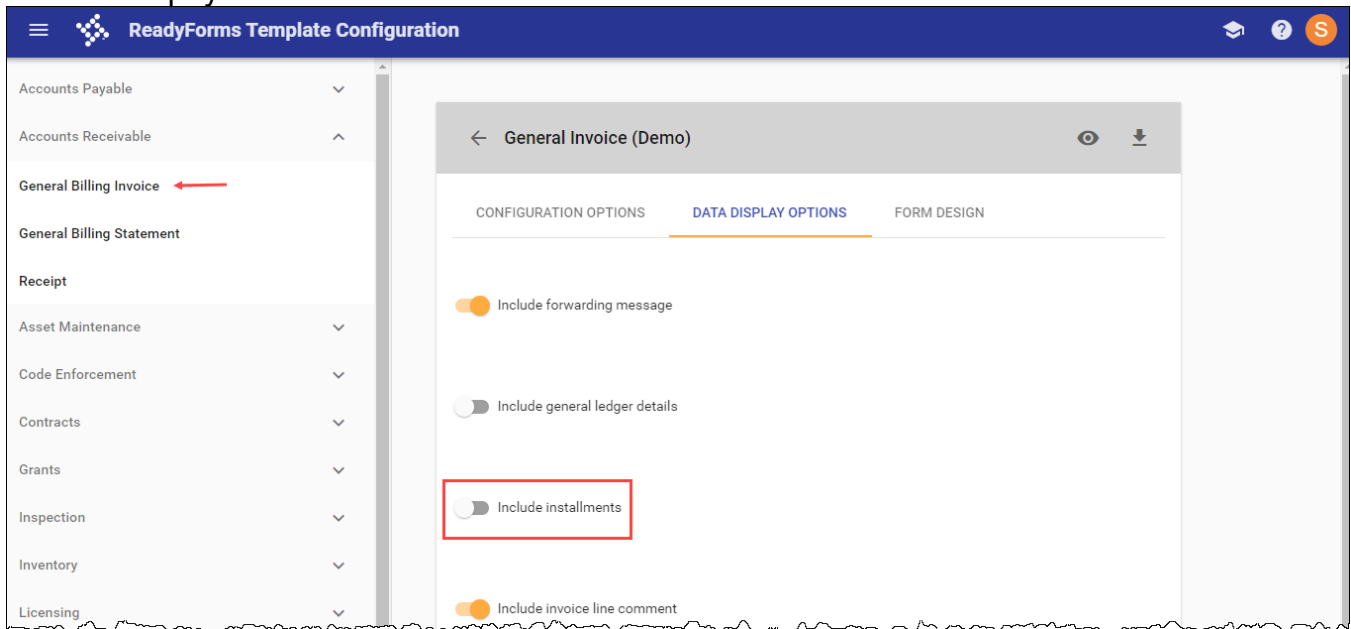
Payroll Check

Jira Issue: TF-8211
Purpose: To include non-cash pay information in the Payroll Check form.
Estimated PACE Training Time: Less than ½ day.
Description: The Include Non-Cash Pay Totals option is added to the Data Display Options tab for the Payroll Check form template. When selected, the Non-Cash Pay type, current total, and year-to-date total display in the Advice Totals group on the check stub. Zero-dollar non-cash pay totals are included. By default, this option is not selected for existing templates and is

selected for new templates.

Personnel Action

Jira Issue: TF-7618
Purpose: To provide a form for the Termination personnel action.
Estimated PACE Training Time: Less than ½ day.
Description: Terminations are added as Personnel Action templates in ReadyForms. If the personnel action is a termination, the form displays a termination action form with the relevant fields and headers.