



Enterprise ERP
powered by Munis®
Enterprise Utilities

*Major Enhancements
2020-2021*

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Enterprise Utilities

The Enterprise Utilities Major Enhancements document provides an overview of the major enhancements for the Enterprise ERP, powered by Munis® releases: 2020.1, 2020.2, 2020.3, 2021.1, 2021.2, 2021.3, 2021.4, and 2021.5.

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 Enterprise ERP, contact your account representative. When reviewing PACE details, please keep in mind that sessions are scheduled in four-hour increments.

See the release notes on [Tyler Deploy](#) for descriptions of the general enhancements and program fixes that were completed for Enterprise ERP.

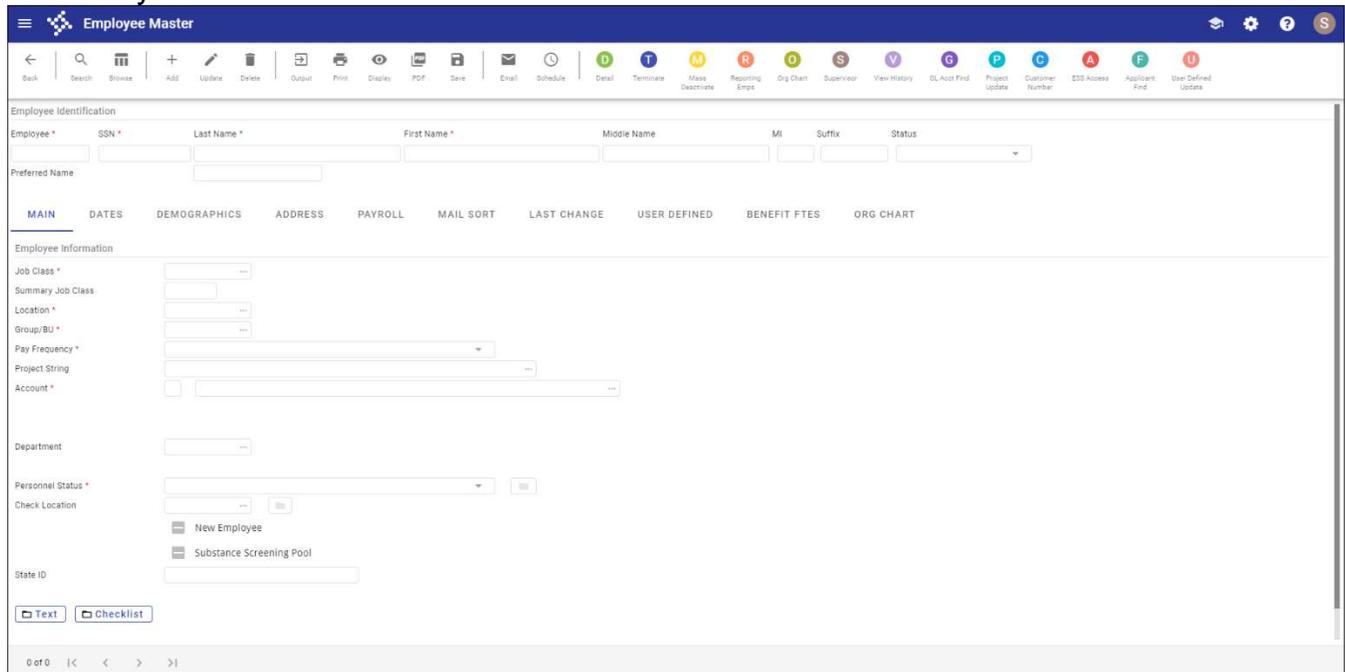
In early 2022, Tyler announced new names for many of its products, including Enterprise ERP. See <https://www.tylertech.com/resources/blog-articles/same-tyler-products-new-names> for more details about this process.

User Interface

User Interface

2020.1

For 2020.1, the user interface (UI) is updated for improved usability. The UI uses a flat design for images, including toolbar options and folder buttons. The fonts used throughout Enterprise ERP, including labels for fields, options, groups, and buttons, are changed for improved readability.



Utility Billing CIS

Account Customer Inquiry, UB Central, UB Settings

2021.5

Jira Number: MUN-429308

Purpose: To store and display audit history for accounts in Account Customer Inquiry and UB Central.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than ½ day.

Description: The Site Options 1 tab of UB Settings is updated to include a checkbox for Create Audits When Viewing Accounts in UB Central/Account Inquiry. When this option is selected, the system creates audit history records whenever an account is viewed in the UB Central and Account Customer Inquiry programs.

The screenshot shows the 'Settings' application interface. The 'Site Options 1' tab is selected and highlighted with a red box. Under the 'General' section, the checkbox 'Create audits when viewing accounts in UB Central/Account Inquiry' is also highlighted with a red box. Other visible options include 'Update general ledger (GL)', 'Budget plan', and 'Display account user-defined fields in Utilities'. The 'Processing' section contains dropdown menus for 'Process by', 'Estimate/Average by', 'Apply credits by', and 'Calculate late on'. The 'Proration' section has a dropdown for 'Prorate from' and a text input for 'Prorate zero days as'. The 'Default Meter Asset Type' section includes a table with columns for Type, Administrative, Asset, and Asset Type, listing Water Meters, Electric Meters, Gas Meters, and Other Meters. The 'Default Department' section has dropdown menus for 'Backflow Devices' and 'Flat Inventory'.

The Account Customer Inquiry and UB Central programs are modified to display the customer's primary telephone number, Social Security number, driver's license number, and date of birth for users who have been assigned the Accounts Receivable role permissions required to view this information.

Both the Account Customer Inquiry and UB Central programs also include the Viewing Audit toolbar option. Selecting the Viewing Audit option displays the Viewing Audit screen that shows the history for one or more accounts.

Account Event History, Lien Release Process

2021.4

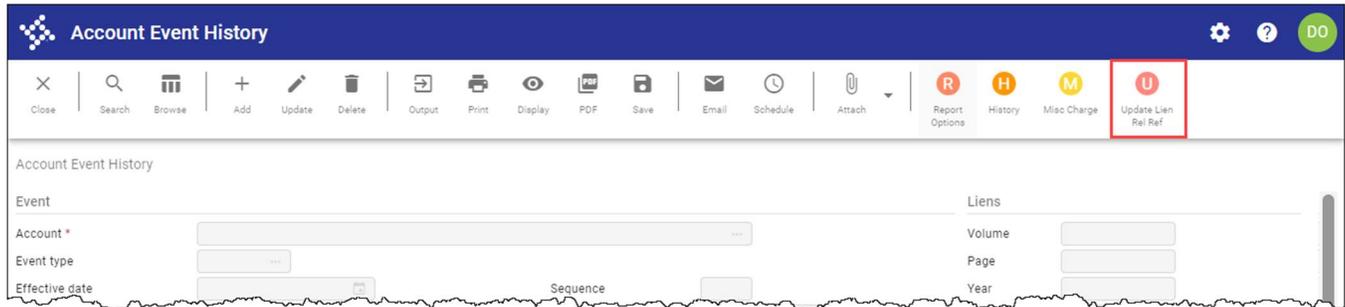
Jira Number: MUN-422760

Purpose: To provide a means of updating multiple lien release references at once.

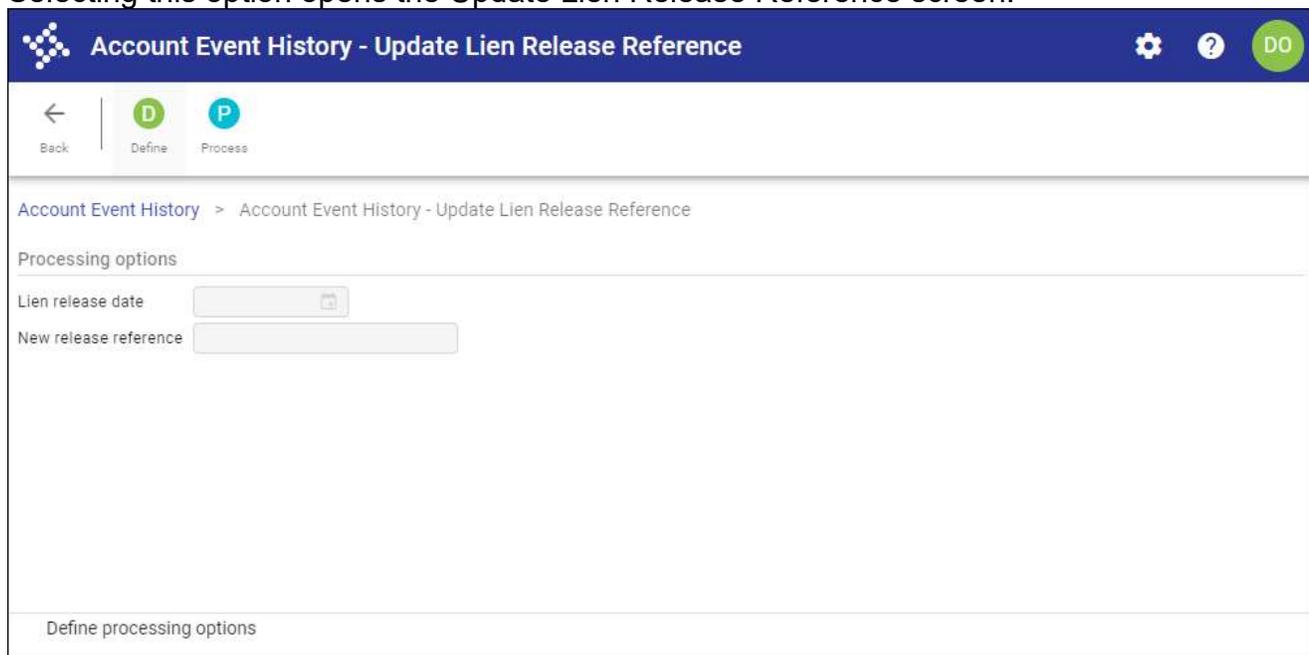
Client Suggestion: Yes

Estimated PACE Training Time: Less than ½ day.

Description: The toolbar in the Account Event History program includes the Update Lien Release Reference option, which updates multiple lien release references at once based on the lien release date.



Selecting this option opens the Update Lien Release Reference screen.



In the Define step of the process, you can enter a new lien release date and lien release reference. The Process step searches for Transfer Delinquent to Tax (TDT) event records with a lien release date matching the defined date, and updates each record found with the defined lien release value. The program creates standard audit history for each record updated.

Bill Print, Delinquent Notices, UB Settings

2021.5

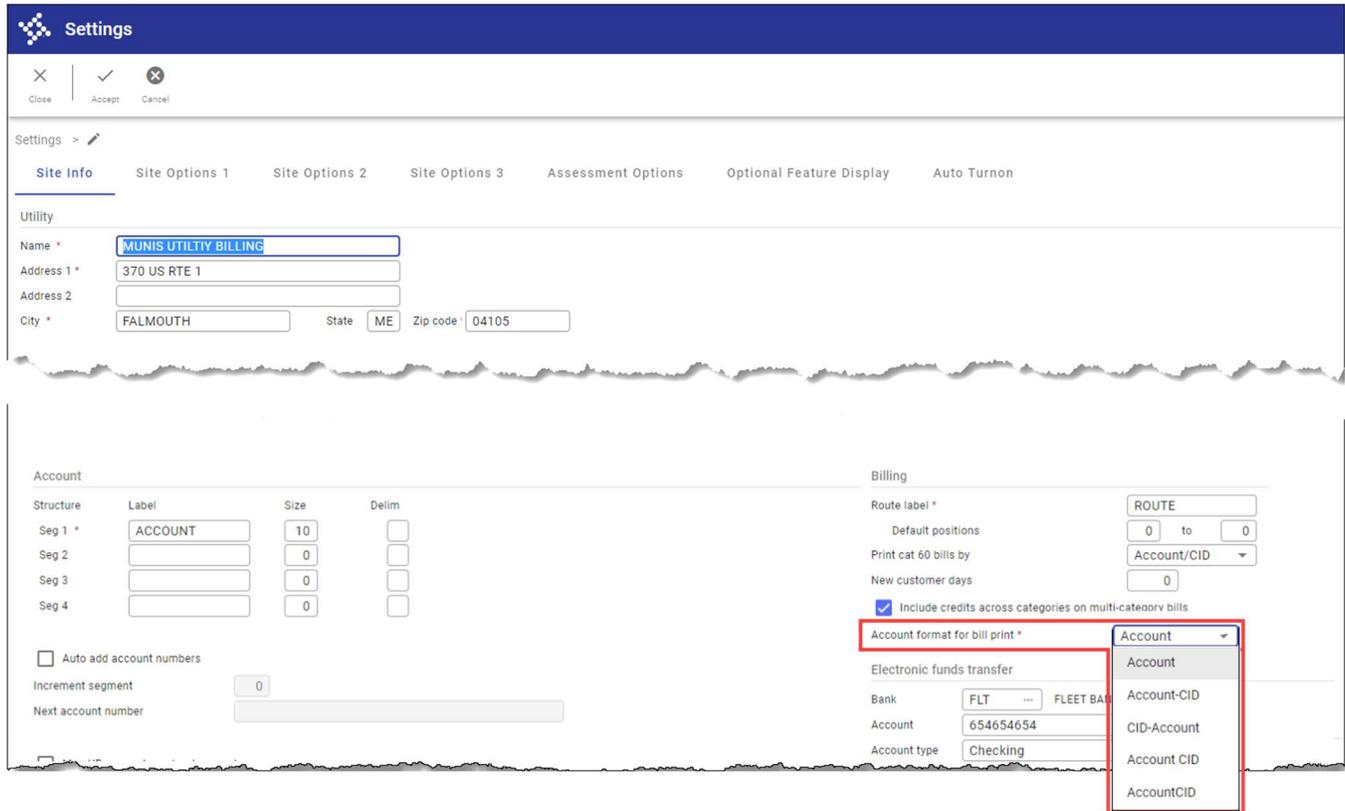
Jira Number: MUN-422075

Purpose: To provide an option for defining how account numbers are formatted for Bill Print XML export to Forms.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than ½ day.

Description: For organizations that use Forms with Utility Billing, the Account Format for Bill Print option in UB Settings defines how account numbers are formatted on bill statements. The selections available for this option are Account, Account-CID, CID-Account, Account CID and AccountCID.



The Bill Print, Delinquent Notices, and Delinquency Manager programs are updated to transfer the defined account formatting to Forms.

Bill Run Process

2020.1

Jira Number: MUN-324618

Purpose: To provide improved reporting in the Generate Charges step of the Bill Run Process.

Estimated PACE Training Time: Less than ½ day

Description: The Compare Bill Runs option compares the current bill run with a previous bill run. You can use this option to compare accounts, customers, services, metered services, based-on-other services, and flat services.

After the Generate Charges step has been defined and executed, clicking Compare on the toolbar opens the Compare Bill Runs screen. Compare Bill Runs automatically displays the

most recent bill run of the same run type.

Generate Charges

Processing options

Execute this report

Run

Begin date

Account start

Account end

Incl

Compare Bill Runs

Selection criteria

Current: Run M Commitment 191213

Previous: Run M Commitment 191112

Differences

of Account Differences 0 [View Details](#) # of Metered Service Differences 6 [View Details](#) # of Sales Tax Service Differences 3 [View Details](#)

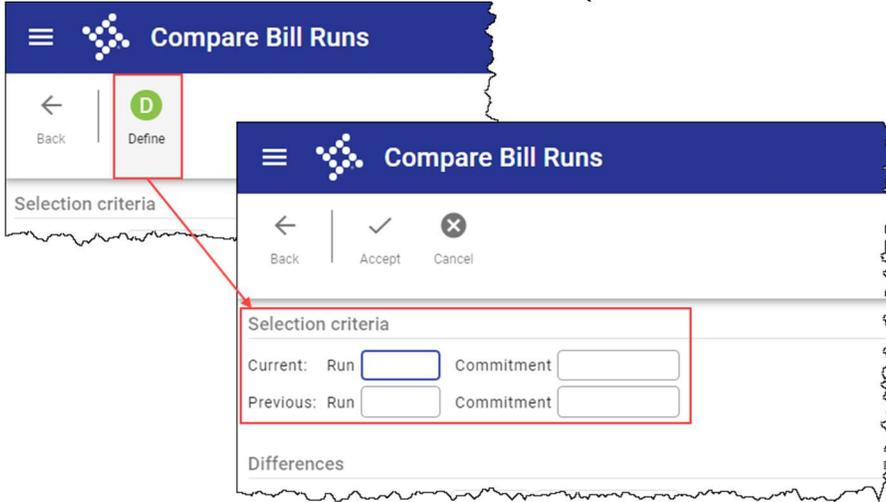
of Customer Differences 4 [View Details](#) # of BOO Service Differences 5 [View Details](#)

of Service Differences 11 [View Details](#) # of Flat Service Differences 1 [View Details](#)

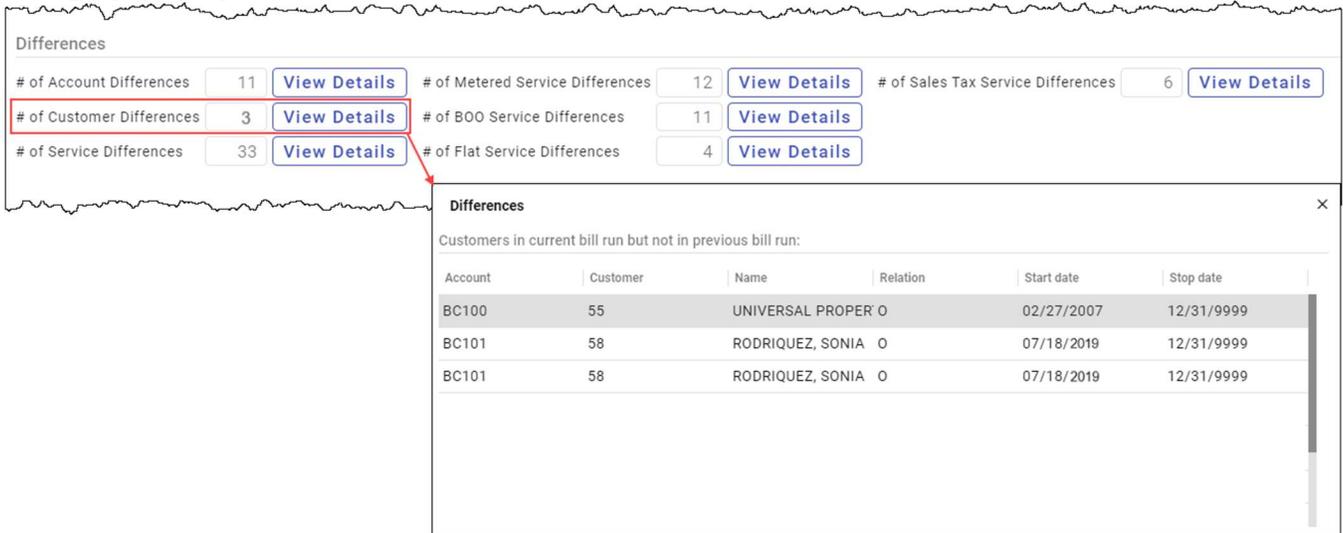
SUMMARY DEFINES

Run	Commitment	Entry date	# of Accounts	# of Customers	# of Services	# of Metered Services	# of BOO Services	# of Flat Services	# of Sales Tax Services
M	191213	12/13/2019	47	41	52	30	47	22	6
M	191112	11/12/2019	47	39	58	32	47	24	7

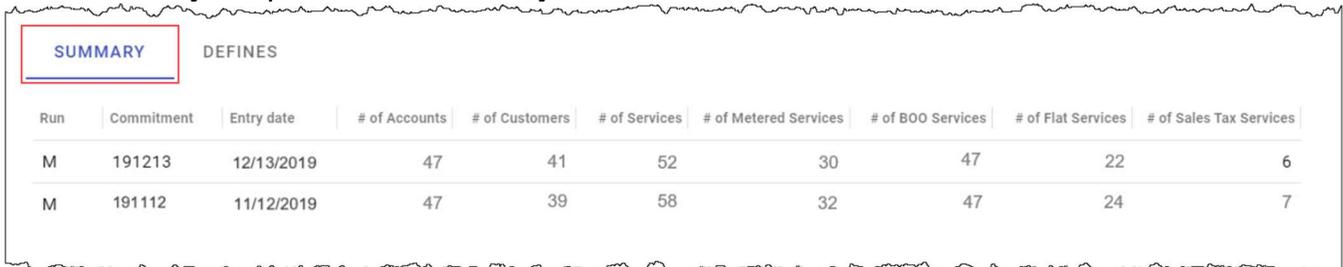
To compare using a different bill run/commitment, click Define and enter the bill runs and commitment numbers for the runs to compare.



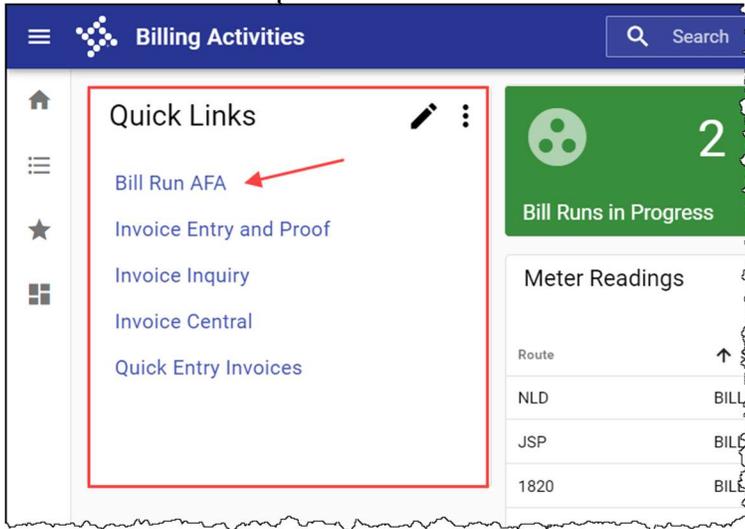
The Differences group displays the number of differences by category: account, customer, service, metered service, based-on-other service, and flat service. Clicking View Details for a category displays the detailed differences.



The Summary tab provides a summary of totals.



The Bill Run AFA option can also be added to cards in Hub.



When this option is configured, the value in the Link Type field must be Tyler Menu and the URL field must be directed to the Bill Run AFA program in the Tyler Menu.

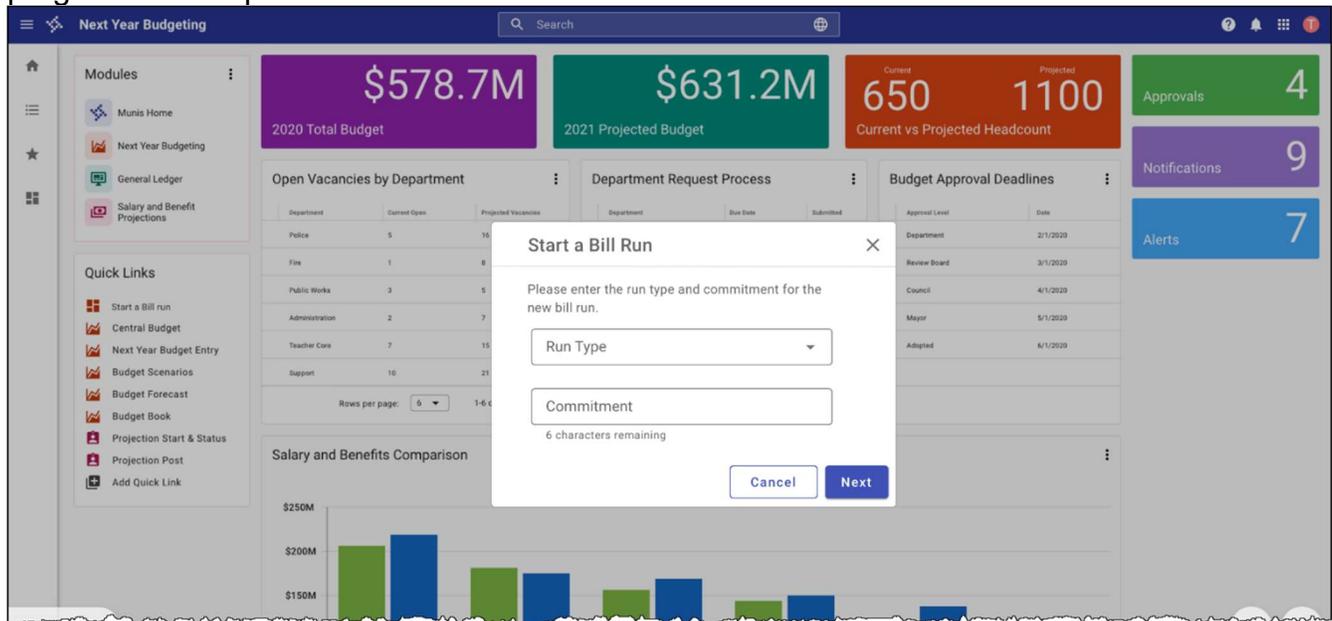
The 'Edit Link' form contains the following fields and options:

- Display Name: Bill Run AFA
- Link Type: Tyler Menu (dropdown)
- URL: https://webappsintdev: (with a '+ Select' button)
- Open Link In: Dialog (dropdown)
- Icon: Utilities (dropdown)
- Icon Color: teal (dropdown)

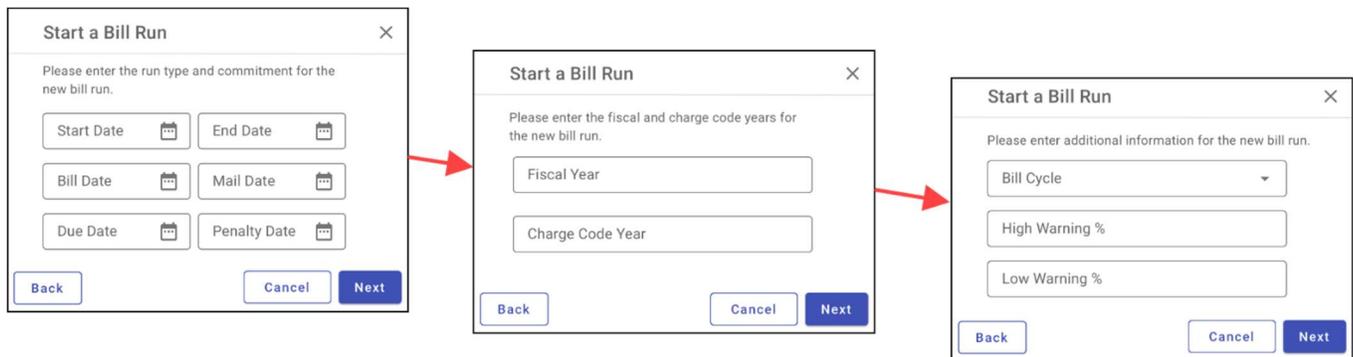
At the bottom of the form are 'Cancel' and 'Save' buttons.

Selecting the Bill Run AFA option from a card begins the guided process for creating a Utility Billing-CIS bill run directly from Hub without the need to open the Bill Run Process

program in Enterprise ERP.



The step-by-step guided process prompts the user for the details about the bill run to create.



When all required information has been provided, the program displays a review screen of the details entered. At this stage, the Back buttons are available for returning to previous screens to change any of the details.

Start a Bill Run ✕

Please review your bill run details before running it.

Run

Start run type	Commitment
Monthly	DMO

Dates

Start date	End Date
4/3/2021	5/2/2021
5/2/2021	Mail Date
Low	5/2/2021
Due Date	Interest Date
5/24/2021	5/25/2021

Years

Fiscal Year	Charge Code Year
2020	2020

Additional

Bill Cycle	
3	
High Warning %	Low Warning %
200	50

Back Cancel Finish

Clicking Finish starts the bill run and provides a link for opening the Bill Run Process program in Utility Billing.

You successfully started a new bill run.



Close View in Utility Billing

Bill Run Process, UB Settings

2021.5

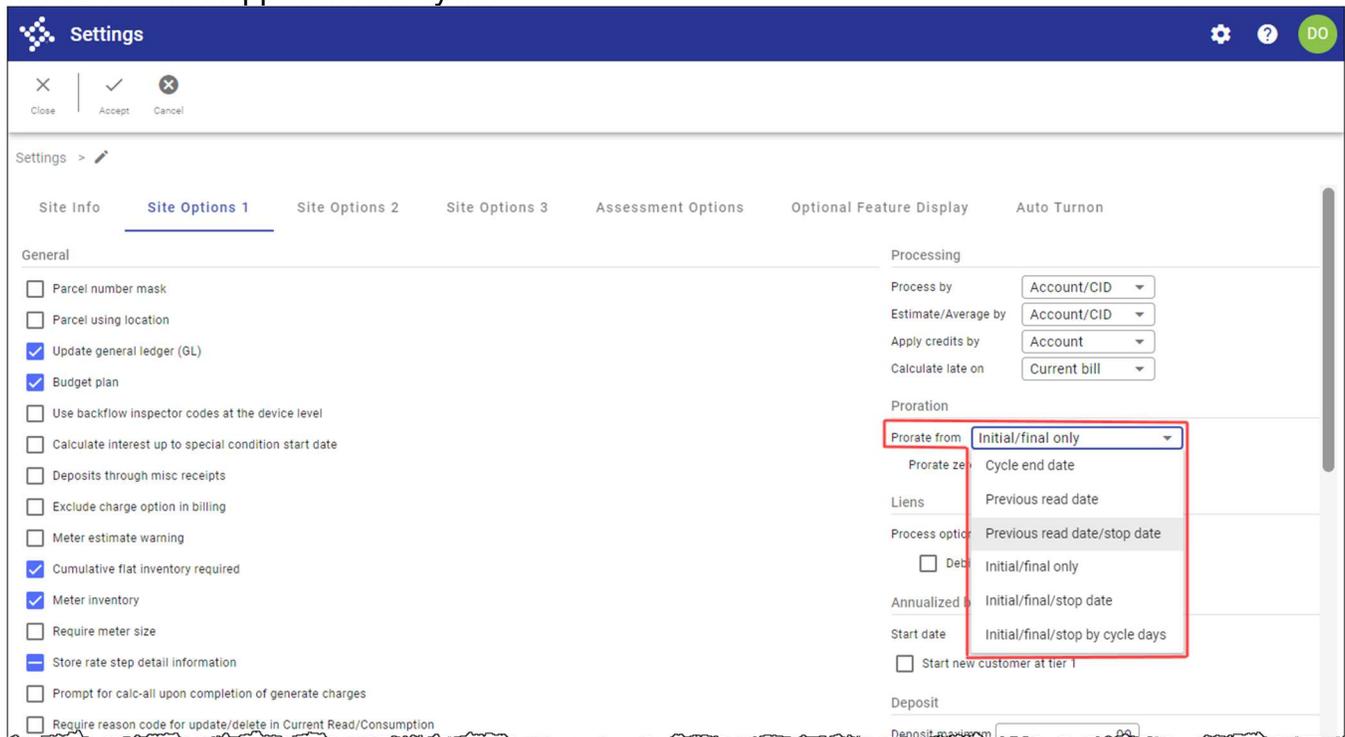
Jira Number: MUN-421766

Purpose: To provide an option for prorating flat services by stop date in regular bill runs that use the previous read date.

Client Suggestion: Yes.

Estimated PACE Training Time: Less than ½ day.

Description: On the Site Options 1 tab in UB Settings, the Prorate From list is updated to include the Previous Read/Stop Date option. This proration method is useful for cases when a flat service is stopped in mid-cycle.



The Calculate Charges and Bill Adjustments portions of the Bill Run Process are updated to use this proration method. When it is enabled, charges are prorated using the over/under proration method at the specified rate level; however, flat services are prorated unconditionally if the stop date of the service falls within the bill run start and end dates.

CSS—Utility Billing, MSS Administration

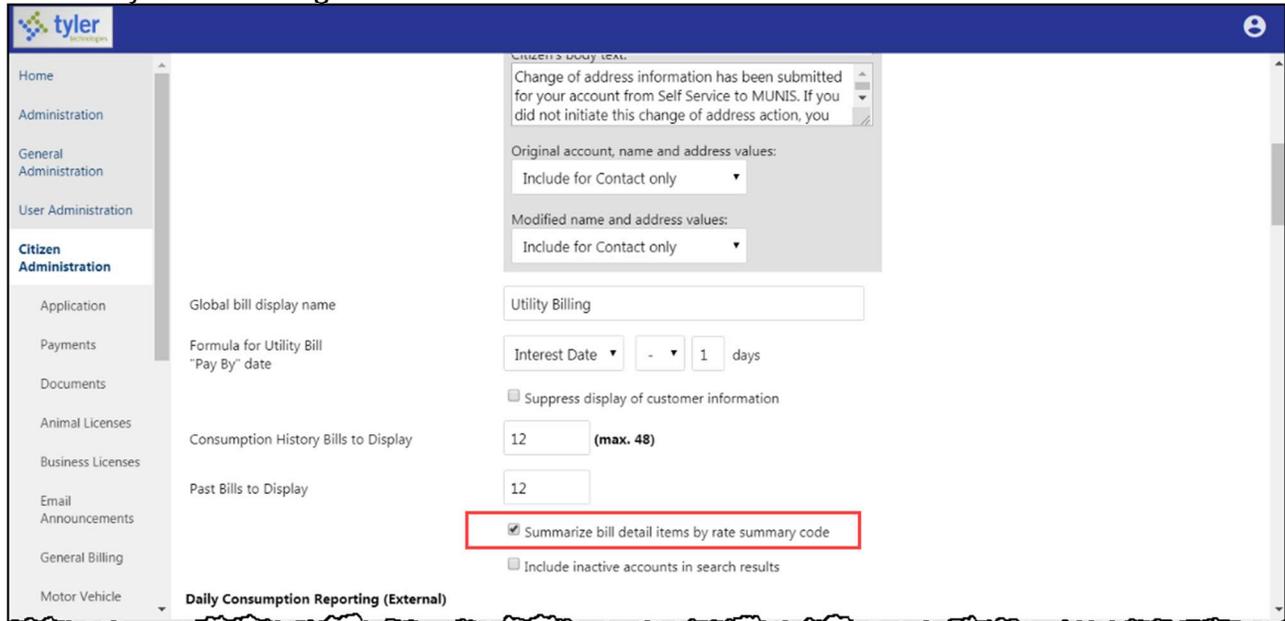
2020.2

Jira Numbers: MUN-325984, MUN-375764

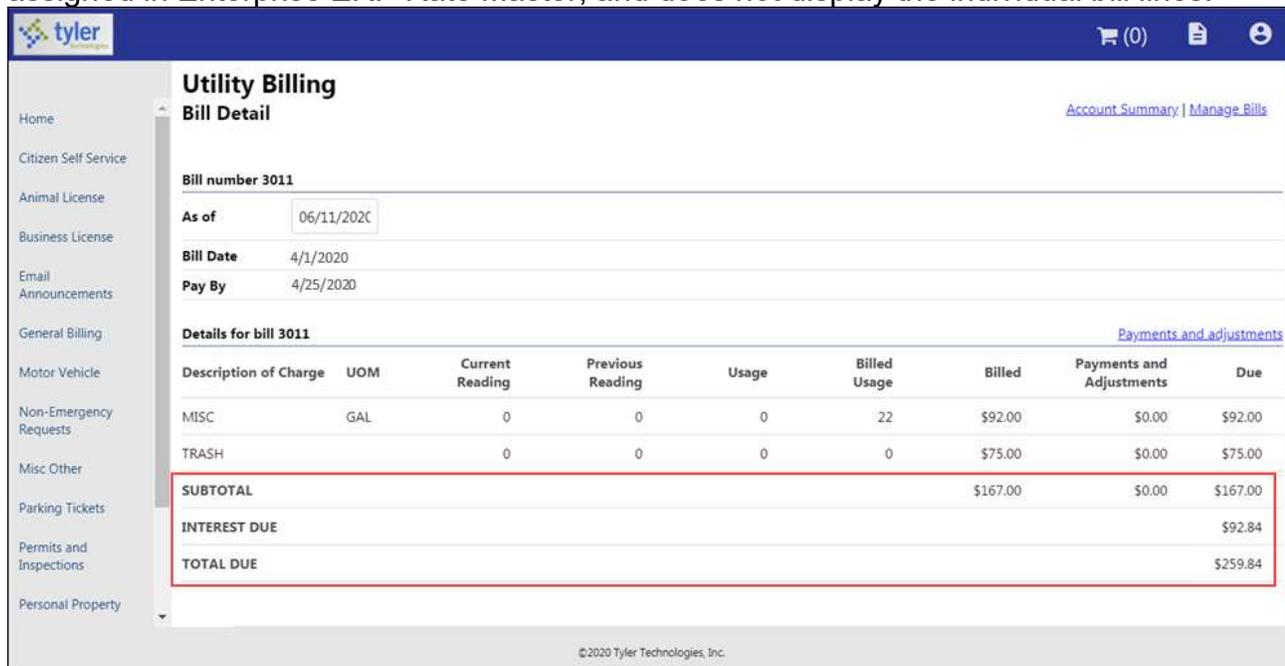
Purpose: To provide an option for summarizing utility bills in CSS by summary code.

Estimated PACE Training Time: Less than ½ day

Description: In CSS–Utility Billing Administration, the Summarize Bill Detail Items by Rate Summary Code setting is available.



When enabled, this setting causes the program to display bill details by the rate summary code assigned in Enterprise ERP Rate Master, and does not display the individual bill lines.



Field Sheet (mobile application)

2020.1

Jira Numbers: MUN-342649, MUN-346517, MUN-345762, MUN-340964, MUN-304231, MUN-345288

Purpose: To make location and contact information available for use on work orders created from the Field Sheet mobile application.

Estimated PACE Training Time: Less than ½ day

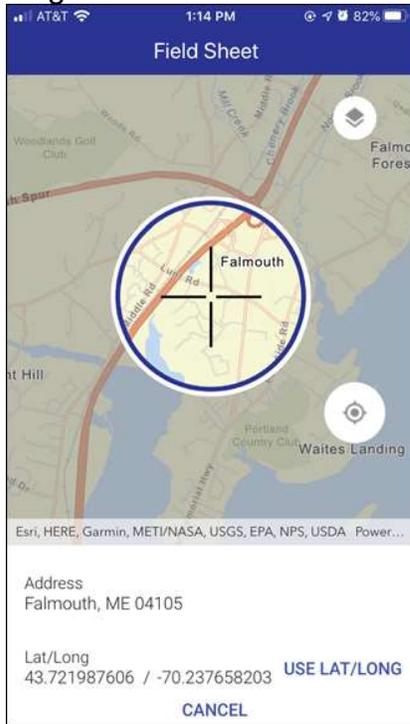
Description: The Field Sheet mobile application is updated for improved handling of location and contact information. Changes include the following:

- The Field Sheet home page includes the work order address.
- When you create a new work order from within Field Sheet, you can add citizen contact persons and location information.

The screenshot shows the 'Field Sheet' mobile application interface for creating a 'New Work Order'. The form contains the following elements:

- Description*:** Water check in median garden
- Requesting Department*:** WATER • Water department
- No Asset Selected:** Includes 'ASSIGN ASSET' and 'SCAN CODE' options.
- Servicing Department*:** PBWKS • Public Works
- Activity*:** GARDEN • Garden Maintenance
- ADD CITIZEN CONTACT:** A button highlighted with a red box.
- ADD LOCATION:** A button highlighted with a red box.
- Requested Start Date:** An unchecked checkbox.
- Requested End Date:** An unchecked checkbox.
- Buttons:** 'Cancel' and 'Add' buttons at the bottom right.

- Users can enter location information either by an address or by the latitude and longitude.



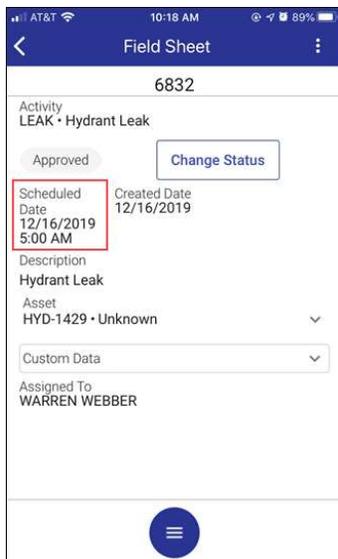
Jira Numbers: MUN-345323, MUN-335346

Purpose: To improve checklist and scheduling information in the Field Sheet mobile application.

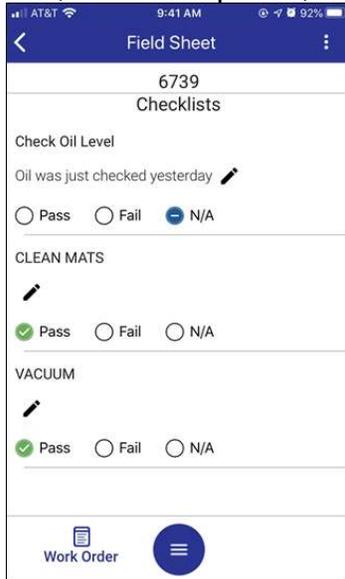
Estimated PACE Training Time: Less than ½ day

Description: Checklists and scheduling features in the Field Sheet mobile application are enhanced as follows:

- The Scheduled Date field includes the scheduled time of day as well as the date.



- Checklists in the Field Sheet mobile application are updated to conform with those used in the Utility Billing Field Work program. For each item on the checklist, there are Pass, Fail, and N/A options, and the Description field accommodates more text.



- In addition, web services for the Field Sheet mobile application are modified to support the updated work order checklists.

Jira Numbers: MUN-362124, MUN-289510

Purpose: To make custom fields available in the Field Sheet mobile application.

Estimated PACE Training Time: Less than ½ day

Description: Work orders created from the Field Sheet mobile application include any custom

fields that have been configured as required in Enterprise ERP programs.

Field Sheet

New Work Order

No Asset Selected

ASSIGN ASSET SCAN CODE

Servicing Department*
GARGE - City Garage

Activity*
BRAKE - Brake job

ADD CITIZEN CONTACT

ADD LOCATION

Requested Start Date

Requested End Date

Assign to me

Custom Data

Project Id*
State Project (Patrol Supervis)

Cancel Add

Rate Codes, Calculate Charges, Bill Adjustments

2021.4

Jira Number: MUN-422441

Purpose: To provide a rate code for use in issuing sewer volume credits for accounts with multiple condominium units.

Client Suggestion: Yes

Estimated PACE Training Time: Less than 1/2 day.

Description: Calculation code 55 - Condo Unit Volume Credit is available for use in the Rate Codes program.

Rates

Close Accept Cancel

Rates >

Charge code * GZSEW VOLUME CREDIT

Rate code * STND STANDARD RATE CODE

Effective date * 01/01/2021

Calc code * 55 CONDO UNIT VOLUME CREDIT

This code is intended for use when the service type of the rate is O - Based On Other. It allows organizations to issue sewer volume credits for accounts with multiple condominium units when the total consumption for units falls under an allotment of three times the number of condominium units.

For rates that use this calc code, the UOM field is automatically populated with 3, and the UOM Allowance field is populated with 3 as the number of gallons per condominium unit.

The screenshot shows the 'Rates' configuration window. In the 'Additional' section, the 'UOM' field is set to 3 and is highlighted with a red box. In the 'Usage' section, the 'UOM allowance' field is also set to 3 and is highlighted with a red box. Other visible fields include 'Charge code' (GZSEW), 'Rate code' (STND), 'Effective date' (01/01/2021), 'Calc code' (55), and 'UOM desc' (CRED).

Calculation processes in the Calculate Charges and Bill Adjustments programs are updated to multiply the number of condominium units by the allowed usage from the rate and then subtract the billed usage from the water service. For amounts greater than zero, the difference is divided by the unit of measure value from the rate. The results are rounded down to the nearest whole number and multiplied by the rate from the rate table.

Rate Masters

2020.1

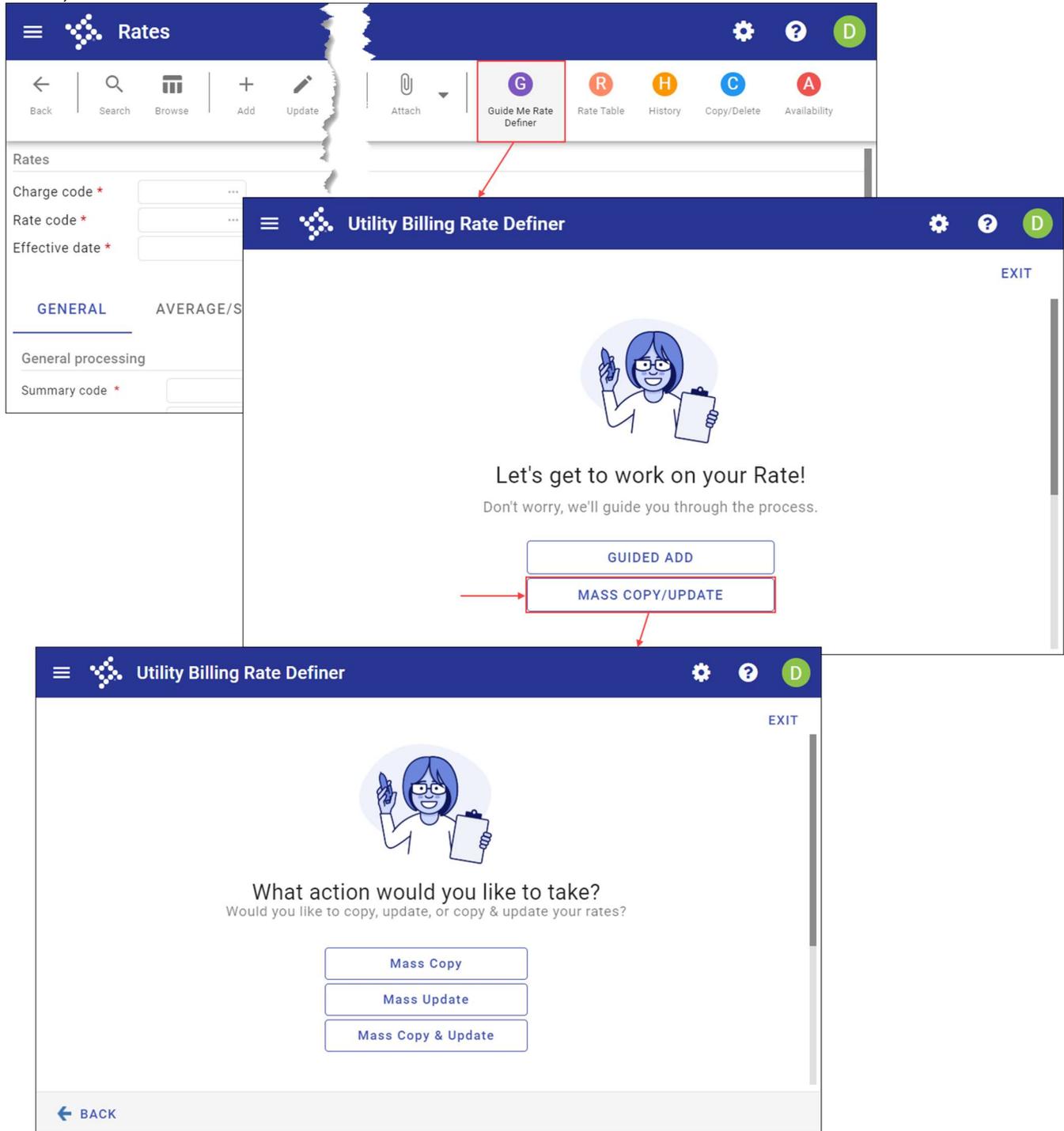
Jira Number: MUN-324038

Purpose: To enhance the guided Rate Definer feature with a Mass Copy/Mass Update function that allows percentage increases on base amounts and rate tiers.

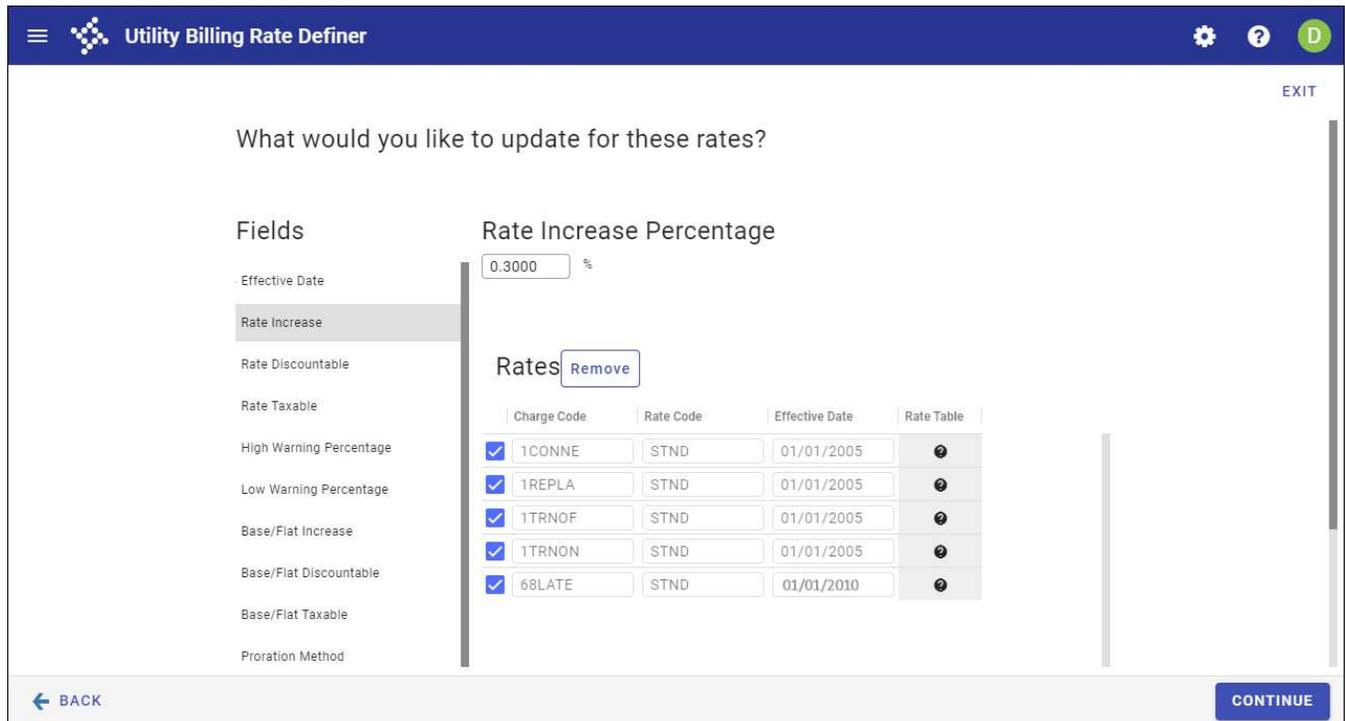
Estimated PACE Training Time: Less than ½ day

Description: In the Rate Masters program, clicking the Guide Me Rate Definer option on the toolbar opens the Rate Definer guided conversation. The Rate Definer provides a series of dialog boxes that prompt you to define the rate and the rate details. Selecting the Mass

Copy/Update option allows you to choose whether to copy multiple rates, update multiple rates, or both.



Modifying rates using the Mass Update or the Mass Copy & Update option provides a way to update multiple utility billing rates at one time and apply percentage increases to base charge amounts and rate tables.



Rates, Miscellaneous Charges, Services

2021.2

Jira Number: MUN-384222

Purpose: To modify existing subject-to functionality to allow a charge such as a fee to be defined for a specific charge code or range of charge codes.

Estimated PACE Training Time: Less than ½ day.

Description: The Default Subject-To option is added to the Rates program to allow selection of a specific subject-to charge to use as the default charge each time a new record using the

rate is added to an account.

The screenshot shows the 'Rates' program interface. The 'Additional' section contains a dropdown menu for 'Default subject-to' which is highlighted with a red box. Other fields include 'UOM', 'UOM desc', 'Base/flat', 'Prorate', 'Discount', 'Taxable', 'Charge amount min', 'Based on other', 'Max', 'Other # per', 'Average payment plan', 'Usage high warning %', 'Usage low warning %', 'Default bill cycle', 'Default deposit', 'Deposit rate code', 'Deposit rule', 'Default late fee charge', 'UOM allowance', and 'Estimate maximum'.

This option provides a convenient method for calculating a sales tax or fee on any applicable service or miscellaneous charge.

If a default subject-to charge is defined on a rate in the Rates program, it is automatically selected in the Miscellaneous Charges and Services programs for any new records for which that rate applies.

Subject-to charges for your organization are established on the Subject-To Charges/Credits screen of the Utility Billing Settings program.

UB Work Orders/Print

2020.1

Jira Number: MUN-324538

Purpose: To update Enterprise ERP Utility Billing work orders to use standard Enterprise Asset Management assignee categories and any custom assignees that are configured in Enterprise Asset Management.

Estimated PACE Training Time: Less than ½ day

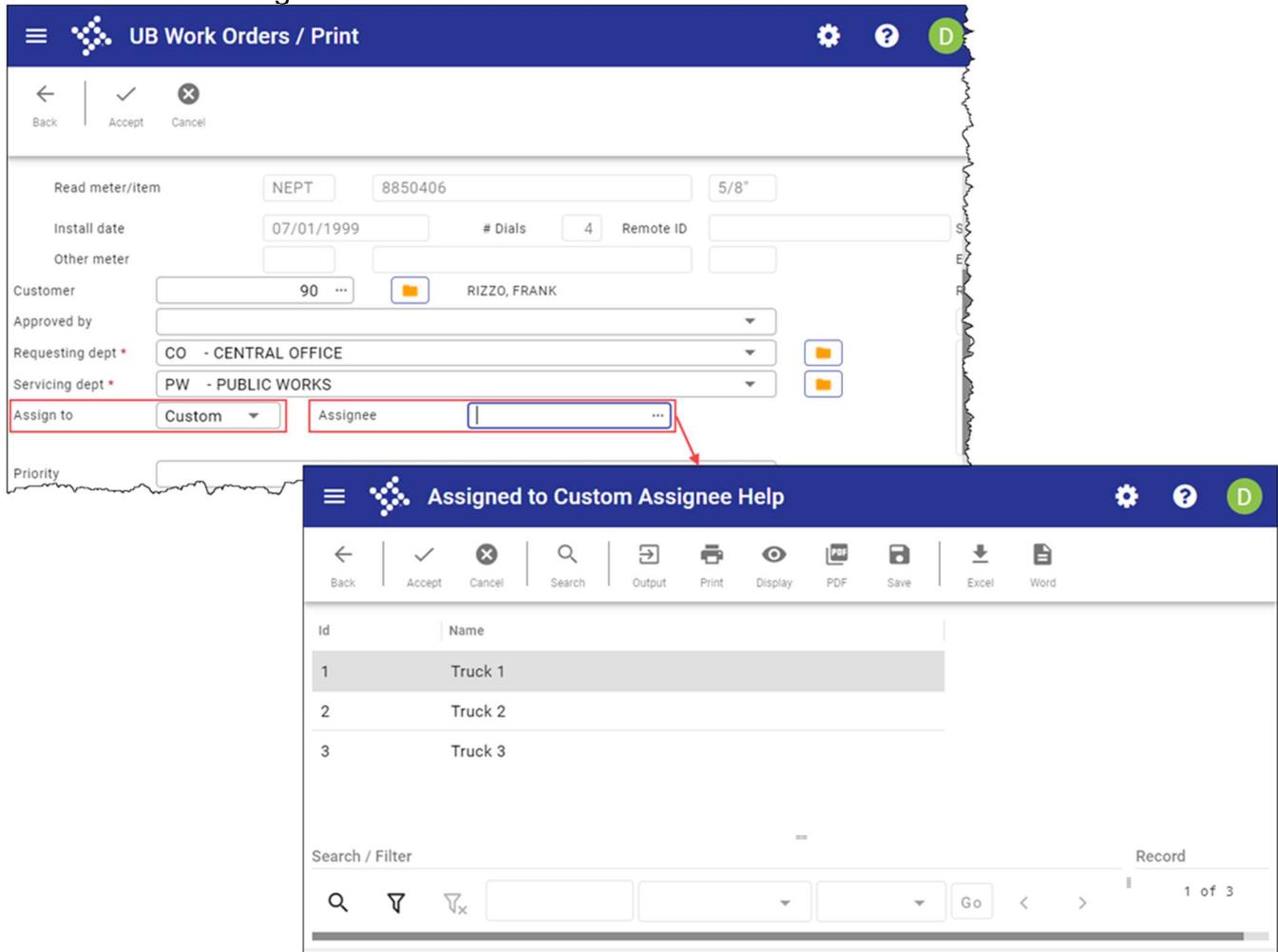
Description: On Utility Billing work orders created from within any Utility Billing programs, the Assign To field on the UB Work Orders/Print screen includes the Custom category in addition

to the standard categories of None, Employee, Crew, and Vendor.

The screenshot shows the 'UB Work Orders / Print' mobile application interface. The top navigation bar is dark blue with a white hamburger menu icon and the text 'UB Work Orders / Print'. Below the navigation bar is a white header with three icons: a back arrow, a checkmark, and a close 'X' icon, labeled 'Back', 'Accept', and 'Cancel' respectively. The main content area is titled 'Work Orders' and contains a form with various fields. The 'Assign to' field at the bottom left is highlighted with a red box, and its dropdown menu is open, showing five options: 'None', 'Employee', 'Crew', 'Vendor', and 'Custom'. Other fields in the form include 'Work order number', 'Entered *' (12/12/201), 'Type *' (CON - CONNECT METER), 'Reason *' (ON - TURN ON), 'Account' (001001), 'Parcel' (001002000000), 'Location' (23 BAY AVE), 'Prop desc', 'Primary svc' (WAT058), 'Read meter/item' (NEPT), 'Install date' (7/01/1999), '# Dials' (4), 'Remote ID', 'Customer' (90), 'Approved by' (RIZZO, FRANK), 'Requesting dept *' (OFFICE), and 'Servicing dept *' (WORKS).

Selecting the assignee category of Custom in the Assign To field makes the list of any custom assignees that have been established in your organization's Asset Maintenance Setup Center

available in the Assignee field.



The Work Order/Service Order Assignees program that was previously used to maintain the list of available assignees for UB work orders is removed from Utility Billing.

Note that the TECH code type that was used to create assignee codes in previous versions of Utility Billing is removed from the Utility Billing Miscellaneous Codes program. This functionality is replaced by the Asset Maintenance Setup Center's assignee categories and assignees.

Important: Upgrading to Enterprise ERP version 2020.1 includes a required UB Assignee Migration Setup process that moves your organization's existing UB TECH code assignees to the new Enterprise Asset Management assignee categories.

In the UB Assignee Migration Setup program, you can select the Enterprise Asset Management assignee category to which an existing UB TECH assignee code is mapped. Any unmapped TECH codes for which you do not make a selection are mapped to the new Custom Assignee category. The migration setup program keeps any TECH assignee codes that had been associated with a specific employee in the earlier UB Work Order Assignees program

mapped to that employee.

UB Assignee Migration Setup							
UB Tech Code	Tech Code Status	Assignee Category	Employee Number	Crew Number	Vendor Number	Custom Assignee	Description
001	inactive	Custom				001	VAN 001
01	Active	Employee	95110				RLT EMP95110
02	Active	Custom				02	GE 2
BECK	inactive	Custom				BECK	Beckys work code
CLS	inactive	Custom				CLS	CHRISTINES TEST CODE! 11/30/01
DWN	inactive	Custom				DWN	dougs so assignee
FW	inactive	Custom				FW	FIELD WORKER
GK	Active	Employee	95110				RLT EMP95110
INS3	inactive	Custom				INS3	inspector3 assignment code
JOES	inactive	Custom				JOES	JOE SMITH
JSP	Active	Custom				JSP	JENNIFER PARAMORE
KARE	inactive	Custom				KARE	Karen Bullinger
MSDD	inactive	Custom				MSDD	MSDESCRIPTION
NICK	inactive	Custom				NICK	Nick Huots Assignee code
NPC	inactive	Custom				NPC	NORMAN CLOUTIER
SAM	inactive	Custom				SAM	Sample Person
SETH	inactive	Custom				SETH	Seth Putnam
WORK	inactive	Employee	95110				RLT EMP95110

System Administration/Roles

Roles

System Administration/Roles describes roles and permission changes for Enterprise Utilities.

2020.1-2021.1

There were no role or permission changes for 2020.1-2021.1.

2021.2

Jira Number	Permission	Description
Utility Billing		
MUN-408884	Reset Generate AR in Progress Flag	Grants role assignees permission to reset the In Progress status of the Generate AR stage of the Bill Run process, when enabled.

2021.3-2021.5

There were no role or permission changes for 2021.3-2021.5.