Mississippi Management and Reporting System

Department of Finance and Administration

MMRS Training Materials		
4001	MERLIN.net Guide for New Users	Date Revised: 08/27/2015
		Version: 6

Table of Contents

Mississippi Executive Resource Library and Information Network

https://merlin.state.ms.us

MERLIN.net
Guide for New Users

MMRS Call Center Support
(601) 359-1343
8:00 AM to 4:30 PM

Introduction

MERLIN uses data warehousing to collect source data from the Statewide Payroll and Human Resource System (SPAHRS) to integrate, store, and deliver information to users through various reports and queries. MERLIN.net provides the user with timely access to this data over the Internet.

How to Get Started

To access information on MERLIN.net the user will first have to be established as a MERLIN user. MERLIN users will be provided with a user name and password to access our system.

MERLIN.net uses Microsoft Internet Explorer 5.5 or higher.

Double click on the Internet Explorer icon on your computer to get to the Internet.

Enter the MMRS homepage address, http://www.mmrs.state.ms.us. From the right navigation bar select "MERLIN." Select "MERLIN.net – Login" from the left navigation bar. The MERLIN.net homepage will be displayed. Click on **Bookmarks** or **Favorites**, and then click on **Add Bookmark** or **Add to Favorites**. The MERLIN.net home page is now stored so that users can go to it any time they want. To access MERLIN.net, double click on the browser icon. Then click **Bookmarks** or **Favorites** and click **MERLIN.net**.

For first-time template users, the **Template Tutorial** should be the user's first priority. The tutorial is divided into six lessons taking approximately 20 minutes to complete. The Template Tutorial is found by clicking on Financial Template from the home page and then clicking on Template Tutorial.

The following picture illustrates the MERLIN.net homepage.

At the top of the page is the navigation bar. This bar will allow users to go back one page, return to the homepage, or access the help menu.

On the left side of the screen in the blue shaded box are the links to the Transparency Mississippi queries, Pre-Defined queries, Template queries, MERLIN Reference, and the users' saved queries. In the center of the page users will find important user information about MERLIN and a link to MMRS Messages from MERLIN page.

Data Reference/Help

MERLIN Reference features:

- MERLIN Analyst View Discussion Database - provides all identified data issues for source systems.

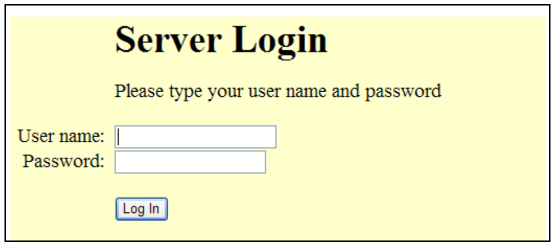
- MERLIN Reference Document Database - provides detailed information on the time frames for each subject area contained in MERLIN.

- MERLIN Data Dictionary - terms for all data items in MERLIN.net Pre-Defined and Template Queries, and the analyst tool.

The reference databases are extremely valuable in MERLIN. They provide quick answers to most questions. The Transparency Reference Guide can be found on the Transparency page.

Reports and Queries

MERLIN.net offers three categories of reports to run: Transparency Mississippi, Pre-Defined Queries, and Template Queries. In order to access Pre-Defined or Template Queries users must have a MERLIN user name and password. Once the user has selected the report to run by clicking on the name of a specific Pre-Defined or Template Query, the dialog box shown below will pop up for User name and Password entry.



Pre-Defined Queries

The queries are designed to answer specific questions. There are specific sets of prompts for the user to create questions and generate a pre-formatted report.

Template Queries

The templates allow the user the flexibility to create a new customized report by defining selection criteria (*e.g.,* filter on Budget Year = 2009), grouping or sorting, and choosing desired columns. See the Template Tutorial for online instructions on how to create, modify, and save report templates.

NOTE: By creating private folders and storing reports in the folders, users may organize saved reports into separate areas. To save a report to a private folder, click ‘Folder.’ Any previously created folder names will appear. One of these may be selected, or a new folder can be created and then selected.

NOTE: For a detailed listing of MMRS Pre-Defined Queries and Template Queries please refer to the *4002 MERLIN.net Quick Reference Guide*.

Listed below are Reports/Queries the user can access through MERLIN.net without a user name and password. These reports were created for the use of the general public.

Transparency Mississippi

Transparency Queries

Budget

State Budget

These reports provide **current year data**.

- **Agency Name** – A year-to-date report of appropriation, expenditures, encumbrances, and outstanding budget authorized for each or all of the State of Mississippi agencies.

- **Expense Type** – The appropriation, expenditures, encumbrances, and outstanding budget authorized for all or a specific agency by expense type.

- **Function -** The appropriation, expenditures, encumbrances, and outstanding budget authorized for all or a specific agency by function of government.

- **Fund Type -** The appropriation, expenditures, encumbrances, and outstanding budget authorized for all agencies or a specific agency by fund type.

- **Fund Type by Agency -** The appropriation, expenditures, encumbrances, and outstanding budget authorized for all by fund type by Agencies.

Agency Appropriation History

The appropriation history, *i.e.,* original appropriation, re-appropriation, escalations, other appropriation modifications, budget cuts, and revenues for a specific agency report may be generated by a Fiscal Year.

Budget Comparison

These reports are comparison reports.

- **Agency Name-** A comparison of the level of the current year expenditures with the number of months of the budget year expended for each or all of the State of Mississippi agencies.

- **Expense Type -** A comparison of the level of the current year expenditures by expense type with the number of months of the budget year expended for each or all of the State of Mississippi agencies.

Expenditures

State Expenditures

These are **current year** reports.

- **Agency Name -** The appropriation, expenditures, encumbrances and outstanding budget authorized for expense type for all or a specific agency.

- **Expense Type –** A year-to-date report of current year appropriation, expenditures, encumbrances, and outstanding budget authorized for each or all expense types.

- **Vendor -** This report lists vendor expenditure information by agency and by expense type. Only information for expenditures created using non-state employee vendor numbers are available in this query (payments using state employees' vendor numbers are not included).

- **Fund Type -** A year-to-date report of the current year appropriation, expenditures, encumbrances, and outstanding budget authorized for each or all fund types.

Statewide Expenditures to Cities and Counties

This report contains city and county expenditures information by accounting quarter within an accounting year.

Warrant Number/Agency Report

This report retrieves an agency contact phone number and address when the user enters a specific warrant number.

Statewide Expenditures Download

Reports are available from 2009 to 2014 for all agencies.

MAGIC Implementation – Budget Year 2015 Forward

Expenditures by Agency

This report retrieves expenditures by Budget Year and reports by Agency Name and Agency Number.

Expenditures by Commitment Item

This report contains expenditures by Commitment Item and Commitment Item Group.

Expenditures by Fund Source

This report contains expenditures by Fund Source.

Statewide Expenditures and Revenue to Cities and Counties

This report contains city and county expenditures information by accounting quarter within an accounting year.

Warrant Number/Agency Report

This report retrieves an Amount, Payment Date, Agency, Address, Phone Number and Encashment Date when the user enters a specific warrant number.

Revenue

Portal Convenience Fees

This query provides the 'convenience fees' collected from users who purchase licenses and or services via the State of Mississippi portal by using credit cards, debit cards, or electronic checks.

General Fund Revenue by Source

This monthly report lists the general fund tax revenues for the State of Mississippi.

MAGIC Implementation – Budget Year 2015 Forward

Portal Convenience Fees

This query provides the 'convenience fees' collected from users who purchase licenses and/or services via the State of Mississippi portal by using credit cards, debit cards, or electronic checks.

General Fund Revenue by Source

This monthly report lists the general fund tax revenues for the State of Mississippi.

Travel

- **Agency Name -** This report lists agency’s travel amounts per Quarter and the YTD total.

- **Vendor Name -** This report lists vendor travel expenditure information by agency and is queried by Vendor Last Name.

Contracts

These queries provide contract information for State Agencies for Budget Year 2009 forward in compliance with the Mississippi Accountability and Transparency Act of 2008.

Agency Contract Documents

These documents contain agency contract data provided by state agencies in compliance with the Mississippi Accountability and Transparency Act of 2008. **The responsibility for the accuracy and compliance of the information rests solely and exclusively with the State agency that furnishes it to DFA for posting on this website**.

This report may be generated by Agency, Contract Type, Start Date Range, End Date Range, Contract Service Type, or Contract Number.

Notice of Awards

Interested in notice of contract awards entered by State Agencies on or after July 1, 2009? This query allows interested parties to review agency contract data provided by state agencies in compliance with the American Recovery and Reinvestment Act of 2009 (ARRA). **The responsibility for the accuracy and compliance of the information rests solely and exclusively with the State agency that furnishes it to DFA for posting on this website.**

This report may be generated by Agency Name or Bid/LOC/ITB, RFP Number.

Independent Contracts

This query provides approved independent contract information for State Agencies and may be generated by Agency, Service Type, Start Date Range, End Date Range, or Contract Number.

Legal Contracts

This query provides information on legal contracts entered by State Agencies and approved by the Office of the Attorney General and the State Personnel Board; they may be generated by Agency Name or Service Type.

Contract Worker Contracts

This query provides approved contract worker contract information for State Agencies and may be generated by Agency Name or Service Type.

Contract Worker Year to Date Adjusted Gross Pay

This query provides the year-to-date adjusted gross pay amounts for contract workers as paid in the Statewide Payroll and Human Resource System (SPAHRS) for Budget Year 2009 forward and may be generated by Agency Name, Contract Worker Name, Contract Number, or WIN. Payments for reimbursement on travel related expenses to contract workers are not included.

MAGIC Implementation – Budget Year 2015 Forward

Contracts by Agency

This query provides information by Agency Name and Number of Contracts.

Contracts by Service Type

This query provides information by Service Type and Number of Contracts.

Contracts by Contract Type

This query provides information by Contract Type and Number of Contracts.

Contract Worker Contracts

This query provides information by Agency Name or Service Type.

Contract Worker Year To Date Adjusted Gross Pay

This query provides the year-to-date adjusted gross pay amounts for contract workers as paid in the Statewide Payroll and Human Resource System (SPAHRS) for Budget Year 2014 forward and may be generated by Agency Name, Contract Worker Name, Contract Number, or WIN. Payments for reimbursement on travel related expenses to contract workers are not included.

Leases

Leases by Agency Name

This query provides information by Agency Name and Number of Contracts related to leases.

Leases by Contract Number

This query provides information by Agency Name, Vendor Name, Contract Number, Contract Start Date, Contract End Date and Contract Type related to leases.

MAGIC Implementation – Budget Year 2015 Forward

Leases by Agency

This query provides information by Agency Name and Number of Contracts related to leases.

Bonds

Official Statement Series 2013A

Official Statement Series 2013B

State Treasury Remaining Debt Service Report

This query provides information on the Remaining Debt Service Report by Principal Payment, Interest Payment and Total Debt Service,

Institution/Agency Bond Allocations Report

This query provides information by Project Name, Phase, Bond Allocation, Bond Proceeds, Expended, Remaining and Fund Name.

Grants

Grants by Agency

This query provides information by Agency Name **or** Grants Number related to grants**.**

Grants by Grant Number

This query provides information by Agency Name or Grants Number related to grants.

MAGIC Implementation – Budget Year 2015 Forward

Grants by Agency

This query provides information by Agency Name **or** Grants Number related to grants**.**

Workforce

Number of Employees Paid by Agency

This query provides the number of employees paid for each State of Mississippi agency.

Salary Statistics

This query provides the Maximum, minimum, and average salaries by occupation

MAGIC Implementation – Budget Year 2015 Forward

Salary & Fringe by Agency

This query provides the salary and fringe information for each State of Mississippi agency.

Need a Definition? Click on the ? icon.

MERLIN Schedule of Availability

The MERLIN system is currently available to users Monday – Saturday from 7 a.m. - 9 p.m.

Downtime for MERLIN is every Sunday.