



# Tyler Content Manager SE

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*User Guide  
Version 2018.2*

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# Tyler Content Manager SE

Tyler Content Manager Standard Edition (TCM SE) includes all the standard Tyler Content Manager (TCM) features and is specifically tailored for viewing Munis-related content. TCM SE efficiently captures, stores, and retrieves a wide range of documents related to Munis data.

For more information on using TCM with Munis, access the Munis Knowledgebase and select the Tyler Content Manager for Munis topic. Existing documentation is updated from time-to-time so we recommend that you check back regularly for new additions/updates.

## Content Management Fundamentals

Content management is largely comprised of two main functions: capturing content and retrieving content. Capturing content is the process of adding content (documents, images, and so on) for storage in the system. Retrieving content is the process of locating content that is stored in the system for viewing, updating, distribution, or other purposes.

## Document Types

Document Types (Doc Types) classify content in Tyler Content Manager. By classifying content within specific Doc Types, you can control access and define points of integration with Munis products.

## Munis Mappings

Munis Mappings supply data to TCM for both submission and retrieval purposes. Each mapping is defined to correspond to a particular document type in TCM. Each mapping defines where key pieces of data exist on a Munis record so the data can then be transmitted during content submission or content retrieval. These key pieces of data are known as metadata.

For example, in the Munis Purchase Order Entry program, a mapping identifies where on the purchase order record data such as PO number, fiscal year, department, vendor number, and so on, are located. This data can then be used to create a new attachment to that purchase order or to retrieve existing attachments. Sometimes it is a combination of data values that make a Munis record and an associated TCM attachment unique (for example, PO number and fiscal year).

## Standard Document Type Library

Each TCM installation includes the latest version of the Standard Document Type Library. This library is an ever-growing collection of document types related to Munis. During implementation, your organization determined which document types and which Munis mappings (Munis screens) would be utilized for capturing and retrieving content.

See the Content Manager Document Types document in the Munis Knowledgebase for the most current document type/mapping library.

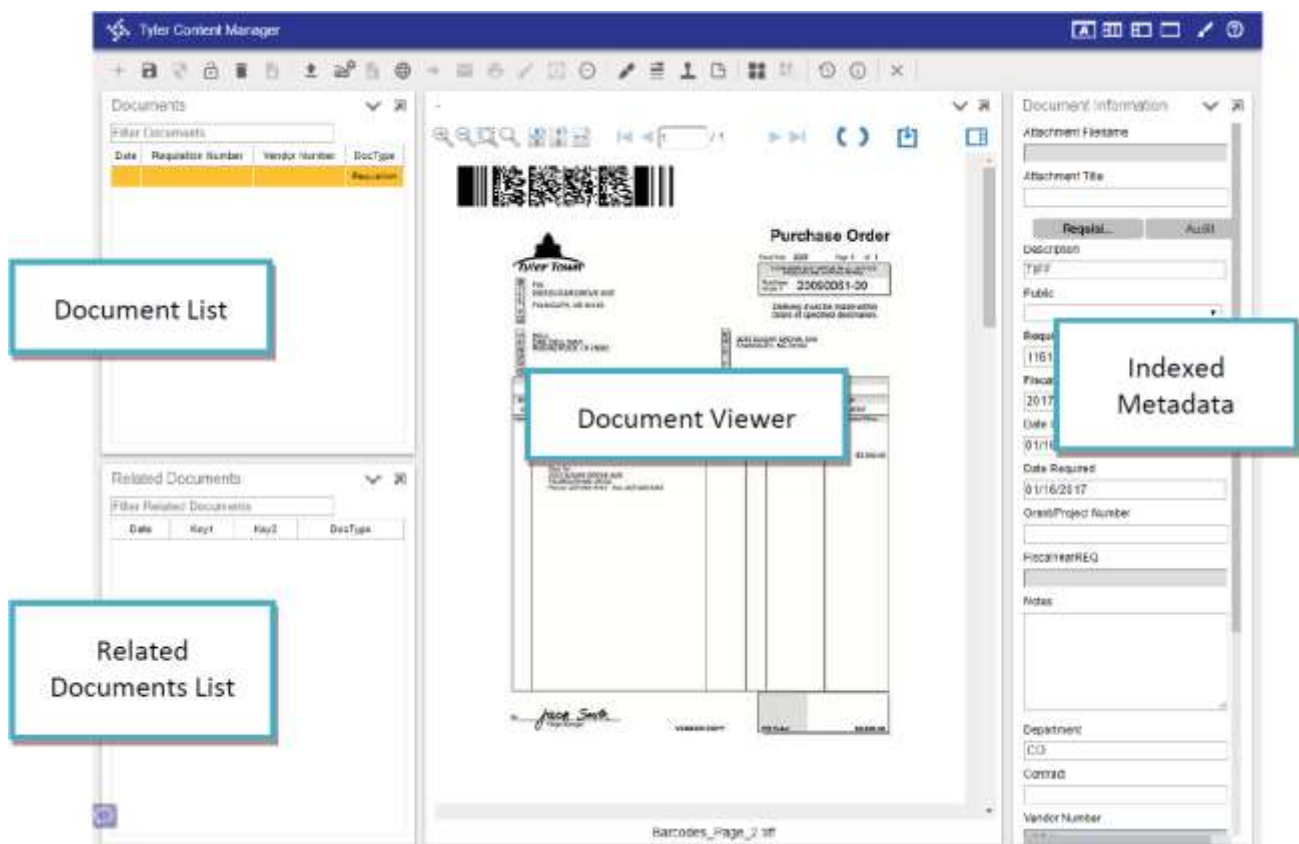
# Using TCM SE

The Tyler Content Manager SE User Guide provides general instructions on using Tyler Content Manager Standard Edition (TCM SE). This document covers using TCM in conjunction with Munis. It does not cover using TCM as a standalone product.

Within this document, the terms *attachment*, *content*, *document*, *file*, and the like are used interchangeably to describe the data that can be captured and retrieved using TCM SE.

## TCM Viewer Interface

The TCM Viewer consists of four resizable panels: Document List, Related Documents List, Document Viewer, and Indexed Metadata.



- Documents List – Displays search results or newly created documents.
- Related Documents List – Displays documents related (via Metadata) to the currently selected (in the Documents List) TCM record.
- Attachment Viewer – A visual of the attachment selected in the Document List.
- Indexed Metadata – Displays the metadata of the currently selected TCM record.







To resize a pane, place your mouse pointer on the dividing line between two panes and with the double arrow  $\leftrightarrow$ , click and drag a pane to the desired size.












## TCM Toolbar and Navigation










There are various functions placed on the toolbar. The Ribbon Bar has been replaced with a new Tyler UX Toolbar and the collapsible categories have now been removed.



















## Toolbar Commands

Icon	Description
<b>Document Group</b>	
	New: Creates a new document.
	Save: Saves the active document in its current state.
	Document Level Permissions: Not currently used by Munis.
	Confidential: Marks/Unmarks a document as Confidential.
	Delete: Deletes the active document and attachments.
	Finalize Document: Not currently used by Munis.

Attachment Group	
	Import: Attaches a file from your PC or a networked drive.
	Scan: Scans document(s).
	Scan Settings (clicking only on the Cog part of the icon): Opens scanner settings dialog.
	Create: Creates and attaches certain new file attachments via 3 <sup>rd</sup> party software such as Microsoft Word and Excel.
	Embed: Attaches an embeddable URL link. This can include YouTube, Google Maps & other online content.
	Export: Exports currently selected file attachment as a downloadable file.
	Email: Creates a new message using default mail application that includes a URL link to view the active document.
	Print: Generates printable PDF of the selected attachment(s).
	Edit: Edits certain file attachments via 3 <sup>rd</sup> party software such as Microsoft Word and Excel.
	Capture: Populates metadata using text in the file attachment. Usable on tiff images only.
	Remove (Attachment): Deletes the attachment only; the document record and associated metadata will remain.

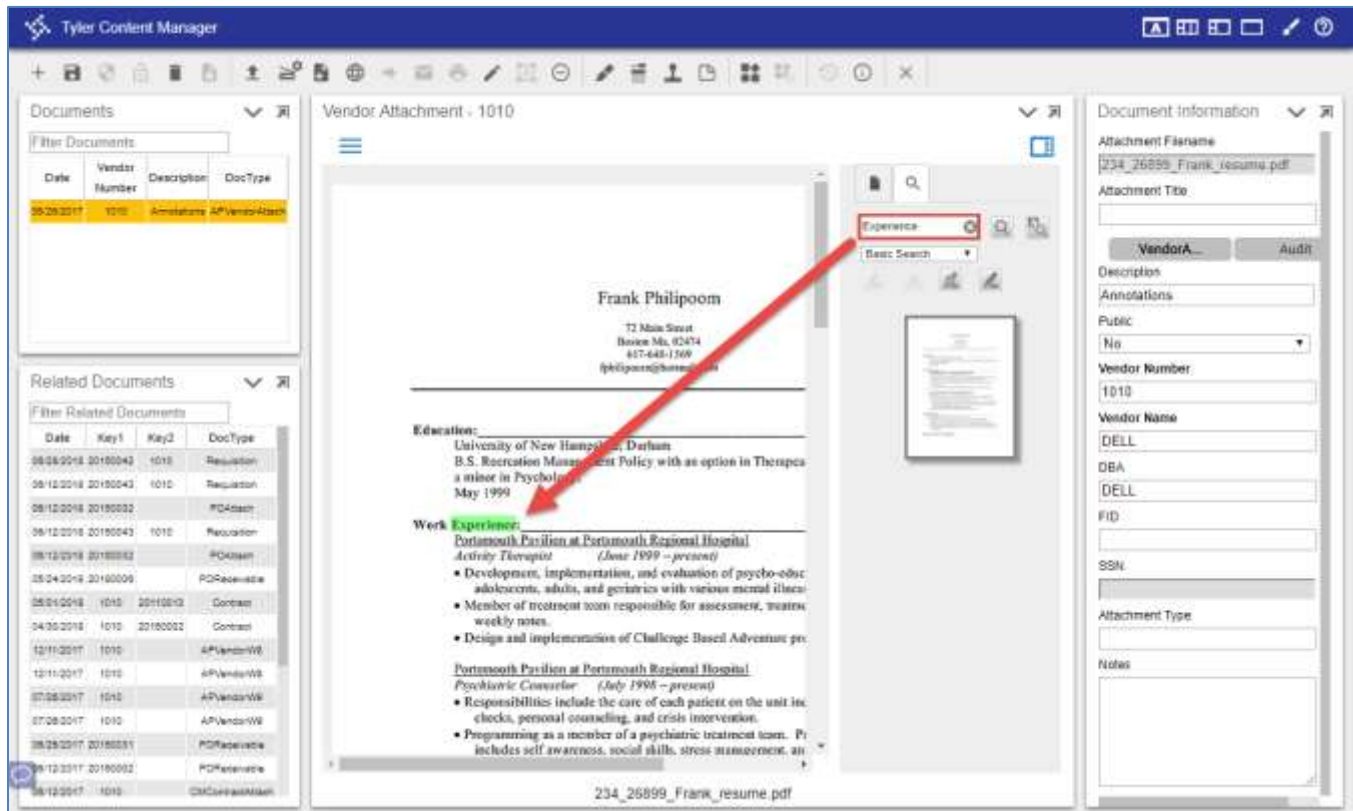
<b>Annotations Group</b>	
<i>NOTE: Annotations apply to image files (for example, .tiff, .jpg, .bmp, and so on).</i>	
	Highlight: Highlights an area on the file attachment.
	Redaction: Redacts an area on the file attachment. This feature requires administrative permissions.
	Stamp: Places a text stamp on the file attachment.
	Sticky Note: Places a sticky note on the file attachment.
<b>Workflow Group</b>	
	Workflow: Initiates the specified Workflow task for the currently selected document.
	Workflow History: Views the Workflow History for the currently selected document.
<b>Tools Group</b>	
	Audit History: Displays the Audit History for metadata & attachments (work in progress)
	Document Information: Displays information about the current attachment (doc id, size, page count, file format, etc.).
<b>Close Group</b>	
	Close: Closes the viewer.

Navigation Bar	
	Zoom in: Zooms in on the attachment.
	Zoom out: Zooms out on the attachment.
	Rubber band zoom: Draws a box on the file attachment and that area will fill the screen.
	Magnifier: Adds a magnifier on the file attachment that can be moved using the mouse.
	Fit to Page: Fits file attachment to viewer window.
	Fit to Height: Fits file attachment to viewer by height.
	Fit to Width: Fits file attachment to viewer by width.
	First Page: Navigates to first page.
	Previous Page: Navigates to previous page.
	Specific Page: Navigates to a specific page (of / x total pages).
	Next Page: Navigates to the next page.
	Last Page: Navigates to the last page.
	Rotate Clockwise: Rotates the current page clockwise.
	Rotate Counter-Clockwise: Rotates the current page counter-clockwise.
	Download: Downloads the attachment in it's original form (plus annotations).
	Thumbnails: Opens the Thumbnail Panel.

## Search Document

The Search Document box, located on the Thumbnail panel, performs a full text OCR search across image documents that have completed the Basic OCR Workflow and text-based PDF documents. It can also search within annotations.

After a word or phrase has been keyed in, hit the Enter key. An OCR search will be performed and if any results are found, they will be highlighted in the document.



Search Group	
	Search Document: Searches OCR or text-based attachment contents.
	Search Annotations: Searches within annotations.
	Previous: Navigates to the previous search result.
	Next: Navigates to the next search result.
	Redact All: Adds a redaction over all search results.
	Redact Current: Adds a redaction over the current search result.

## Display Features

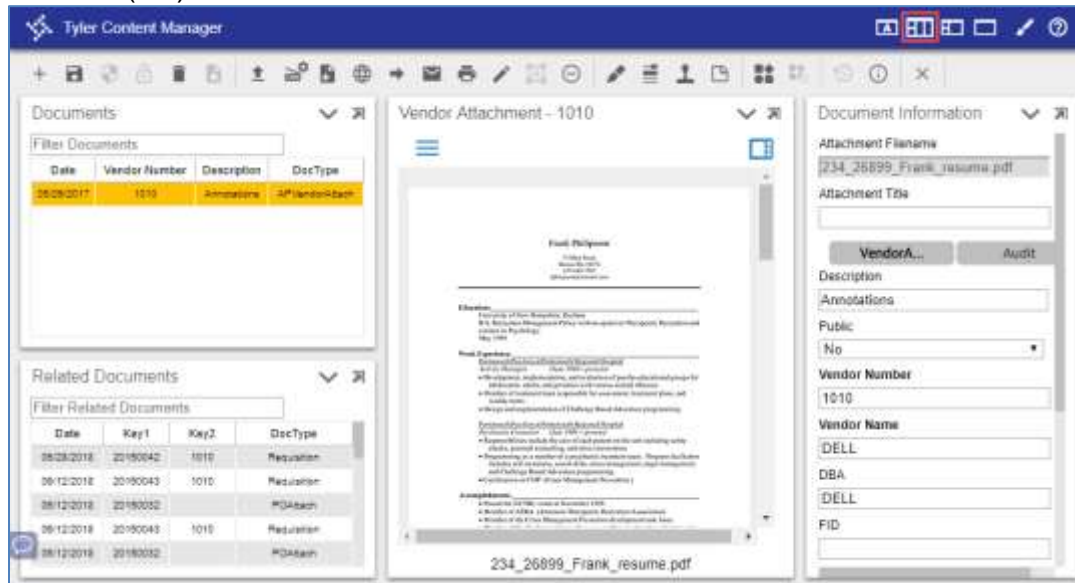
There are several features that modify the layout of the viewer.

### Responsive Design:

The default layout style is **A** which stands for *Automatic*.

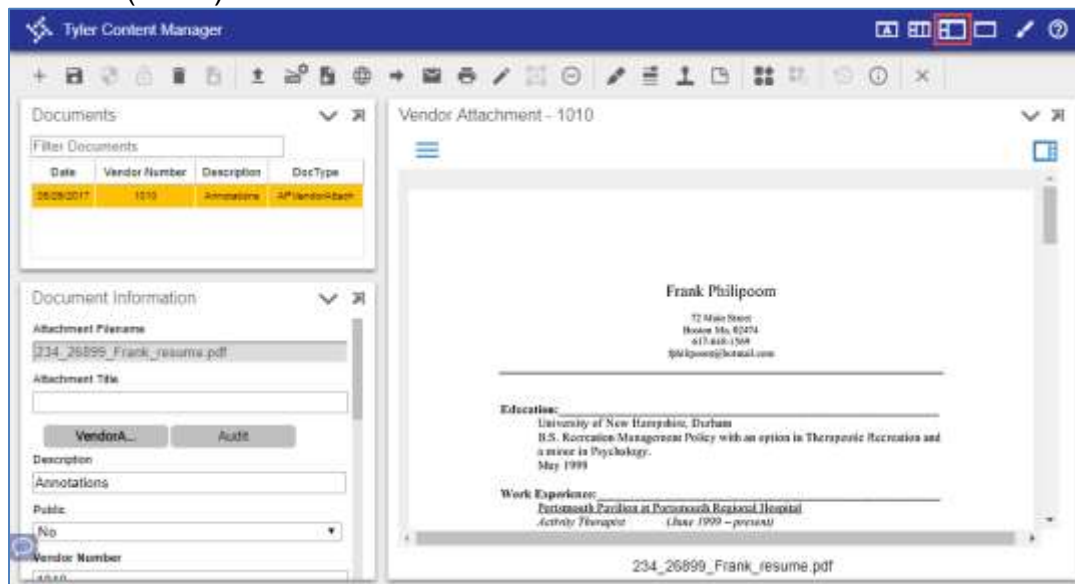
This will automatically adjust the viewer to best fit your device display.

- 4-Panel (full) mode:



This view features all 4 panels visible at the same time.

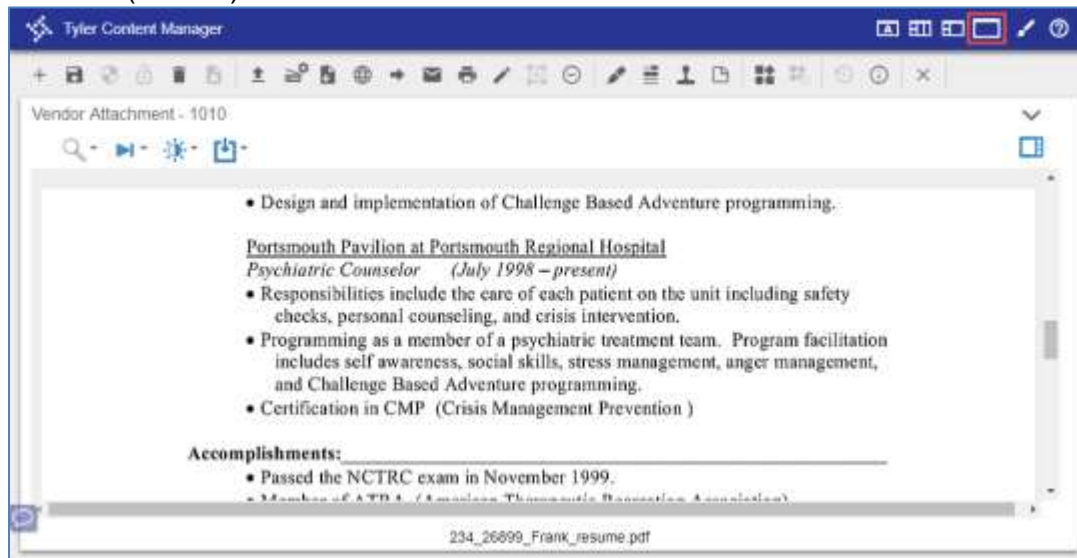
- 3-Panel (tablet) mode:



This view hides the **Related Documents** panel by default.

The missing panel can be viewed by using the Panel Chooser (discussed later).

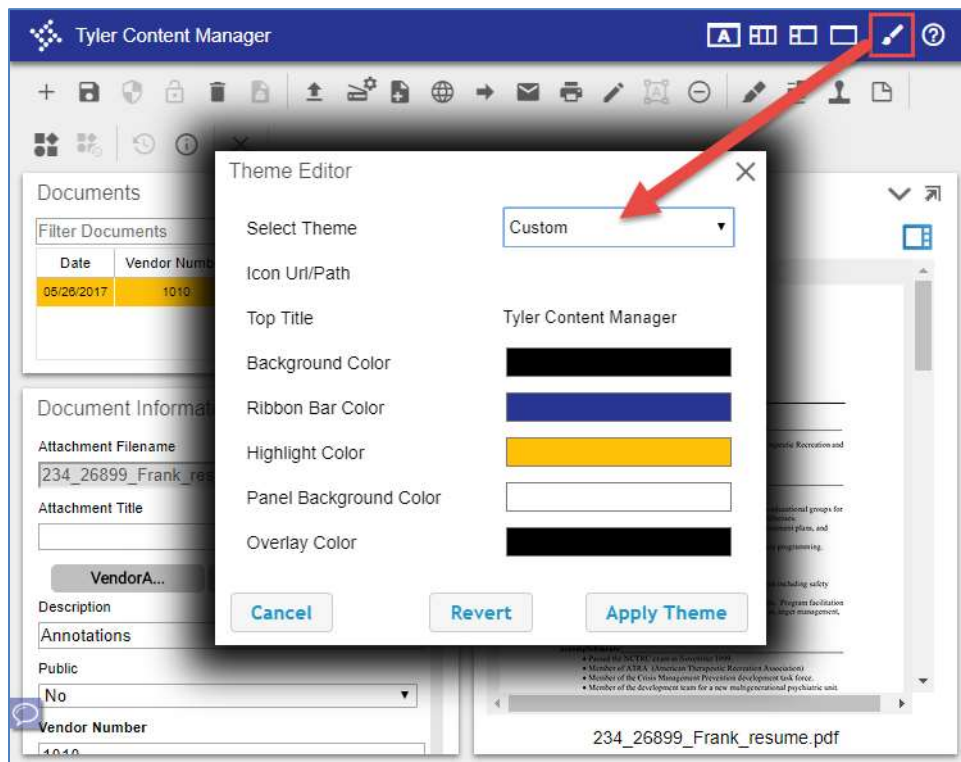
- 1-Panel (mobile) mode:



This view hides all except the **Attachment** panel by default. The missing panels can be viewed by using the Panel Chooser (discussed later).

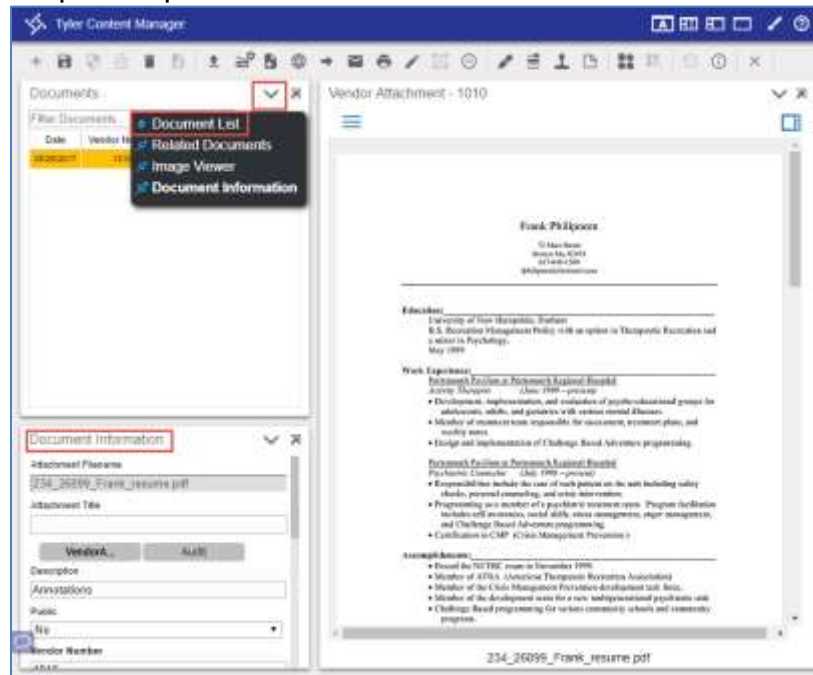
### Theme Editor:

TCM offers a handful of themes and the ability to apply your own custom theme.

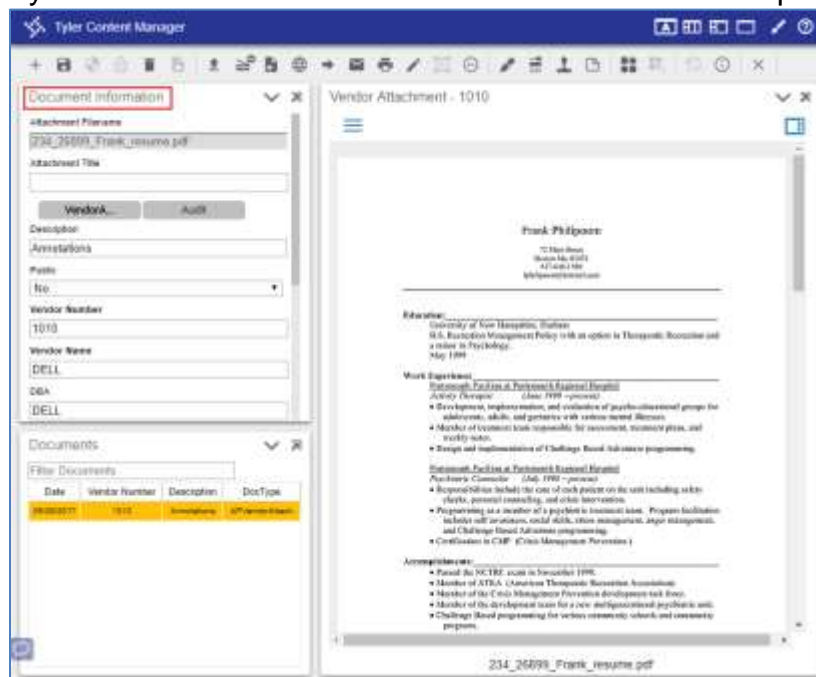


## Panel Chooser

Clicking the in the top-right of any panel will allow you to choose (pin) which panel is displayed in that location. In the example below the upper-left pinned panel is the Document List and the lower-left pinned panel is the Document Information.



Click the in the upper-left panel to display the Chooser and click **Document Information** to pin the Document Information panel to the top-left of the viewer. The Document List panel automatically displays in the lower-left where Document Information had previously been.



## Expanded Panel

Clicking the arrow in the top-right of a panel will enlarge that panel to fill the screen.


Documents ▼ 

Filter Documents



Date ▾	Applicant Number	Job Opening Description	DocType
07/03/2018	16	Police Officer	AppAttach
07/03/2018	16	Police Officer	AppAttach
07/03/2018	16	Police Officer	AppAttach

The expanded view sometimes offers additional features not found in the normal view. In the example below of the Document List panel, thumbnails of the file attachments have been added.

Clicking the arrow in the top-right again will return the panel to its original place and size.

Documents 

Filter Documents

Thumbnail 	Date ▾	Applicant Number	Job Opening Description	DocType
 PDF	07/03/2018	16	Police Officer	AppAttach
 MSWORD	07/03/2018	16	Police Officer	AppAttach
 MPDOC	07/03/2018	16	Police Officer	AppAttach

## Panel Filter and Sorting

The Filter and Sort options can be used to simplify the lists of documents. In the example below “PO” was entered to limit the listing to “POReceivable” records only. Then the **Key1** column header was clicked to sort by that value.

Related Documents ▼ 🔍

Filter Related Documents

Date	Key1	Key2	DocType
06/29/2018	20180029		POReceivable
06/29/2018	5034	1000	APInvoiceAttach
06/28/2018	20180031		POReceivable
06/28/2018	20180029		POReceivable
06/28/2018	20180030		POReceivable
06/28/2018	5034	1000	APInvoiceAttach
06/27/2018	1000	Annotations	APVendorAttach
06/27/2018	20180038		POReceivable
06/26/2018	20180027		POReceivable
06/26/2018	20180039		POReceivable
06/26/2018	20180038		POReceivable
06/26/2018	5034	1000	APInvoiceAttach
06/25/2018	20130069	1000	Requisition
06/25/2018	1000		APVendorW9

Related Documents ▼ 🔍

PO

Date	Key1 •	Key2	DocType
06/26/2018	20180027		POReceivable
06/29/2018	20180029		POReceivable
06/28/2018	20180029		POReceivable
04/17/2018	20180029		POReceivable
06/28/2018	20180030		POReceivable
05/01/2018	20180030		POReceivable
06/28/2018	20180031		POReceivable
05/22/2018	20180032		POReceivable
05/03/2018	20180032		POReceivable
06/22/2018	20180036		POReceivable
06/15/2018	20180036		POReceivable
06/14/2018	20180037		POReceivable
06/06/2018	20180037		POReceivable
06/01/2018	20180037		POReceivable

Clearing the text in the filter will return all results. The original sort is by Date in descending order (most recent first).

## Capturing Content

Documents can be stored in TCM and associated with a Munis record via metadata. There are multiple methods of capturing documents from Munis. On the Munis Ribbon, use the Attach icon to interface with TCM for both capturing and retrieving documents.

The following file types are currently supported in the TCM viewer:

### Image Files

image/tiff  
image/bmp  
image/x-png  
image/jpeg  
image/gif  
image/pcx

### Text Files

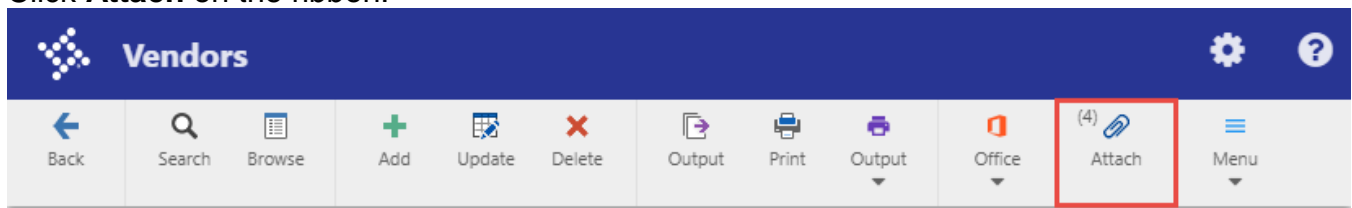
text/html  
text/plain  
text/rtf  
text/xml

### Application Files

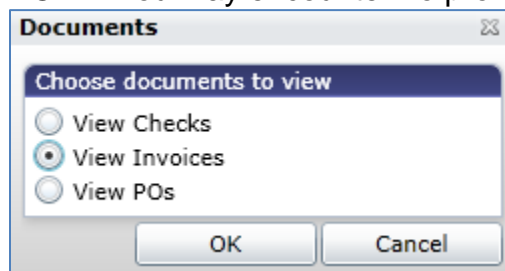
application/pdf  
application/msword  
application/vnd.excel  
application/mspowerpoint  
application/vnd.wordxml  
application/vnd.powerpointxml  
application/vnd.excelxml

To capture data from a Munis record:

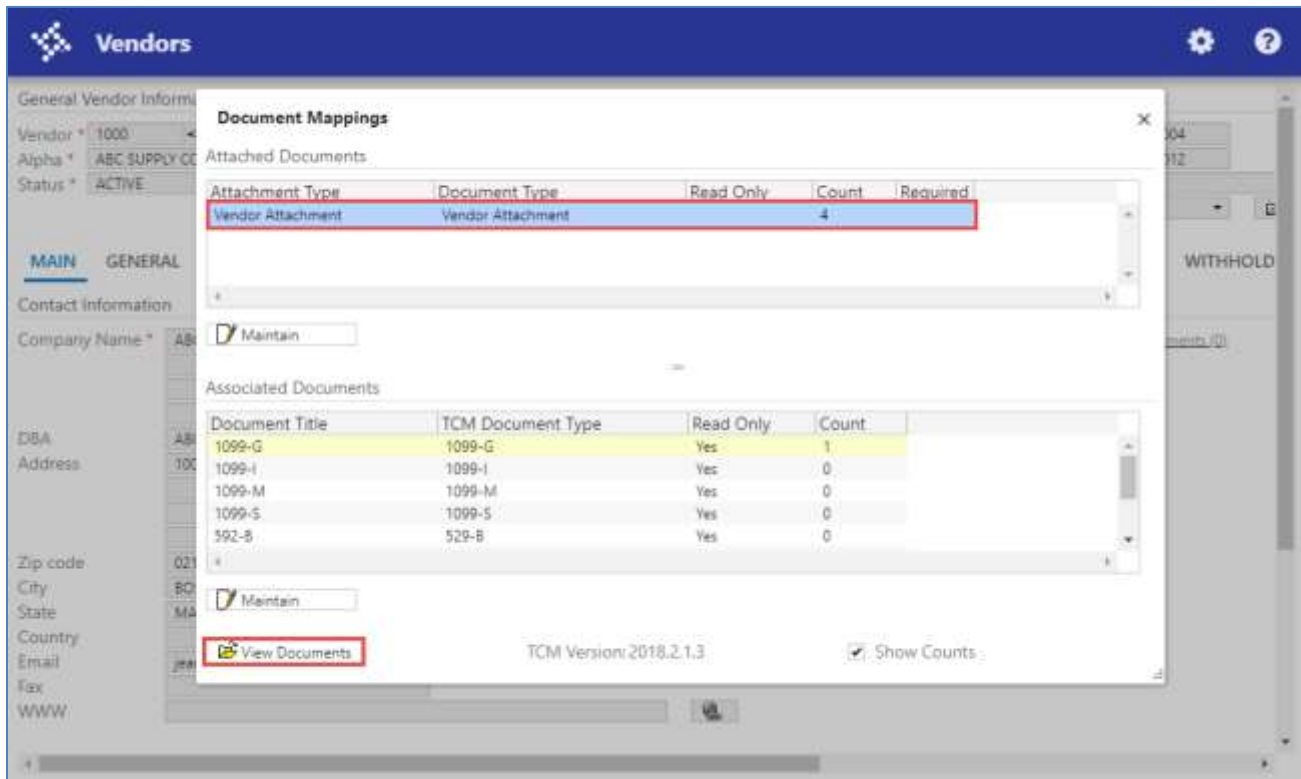
1. In Munis, create a new record or navigate to an existing record.
2. Click **Attach** on the ribbon.



3. If prompted, select the type of document to view from the list provided.  
NOTE: You may encounter no prompts, or you may encounter multiple prompts.



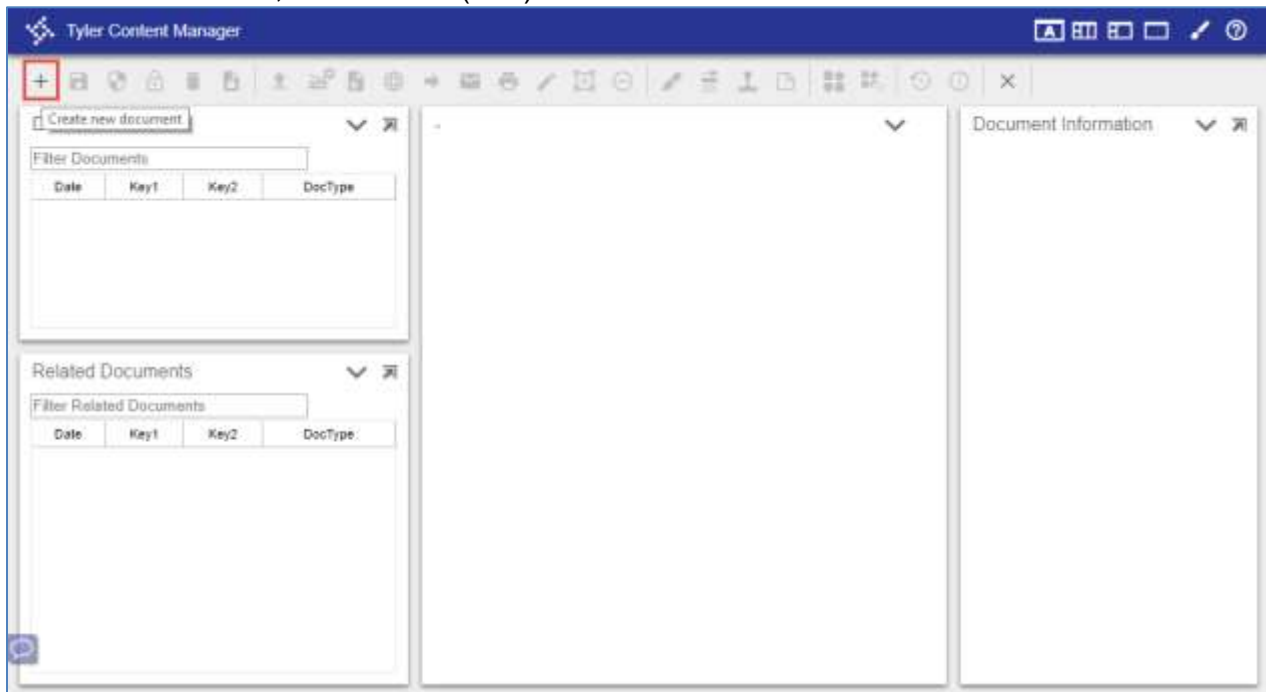
- When the program displays the **Document Mappings** screen, select the applicable mapping and click the **View Documents** button. Alternately double-clicking the applicable mapping will also allow you to view documents.



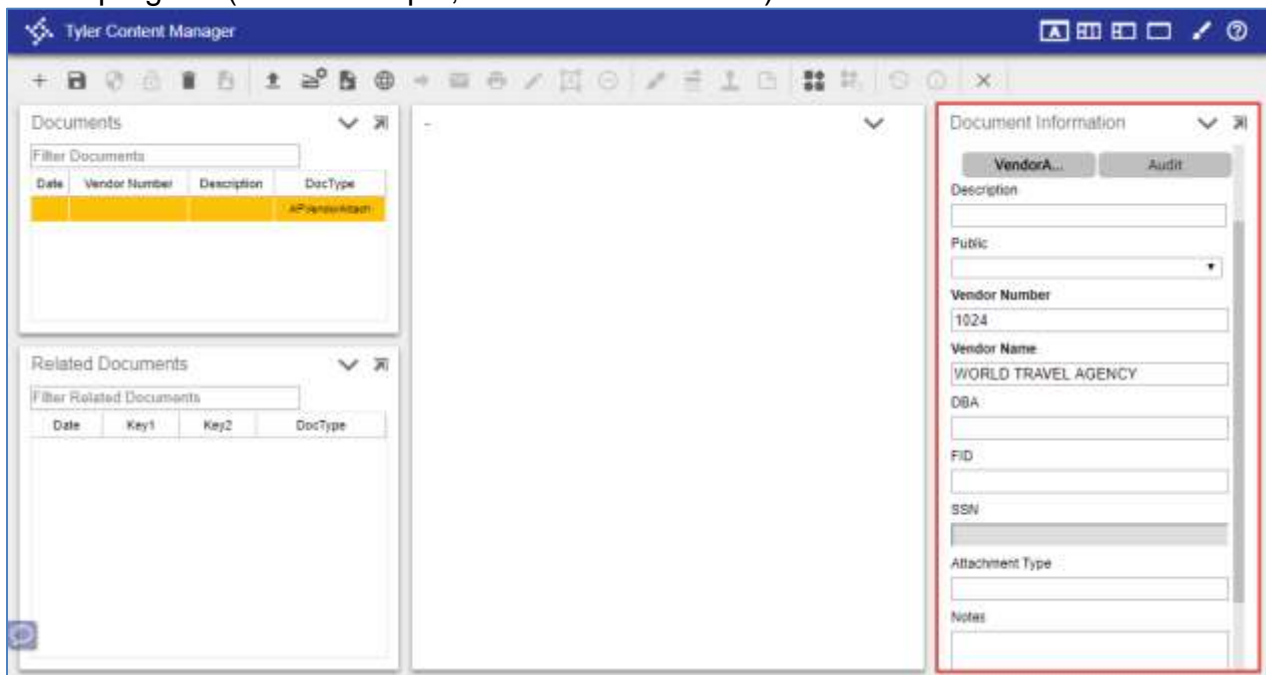
NOTE: If your role is not assigned the Maintained Mappings permission in the Roles – Munis System program and there is only one mapping that exists for that Munis screen, the Defined Maps screen does not display; the application automatically displays the TCM Document Viewer.

NOTE: Some mappings may be read-only and are only intended for retrieving purposes.

- In the **TCM Viewer**, click the **+** (add) icon on the toolbar.




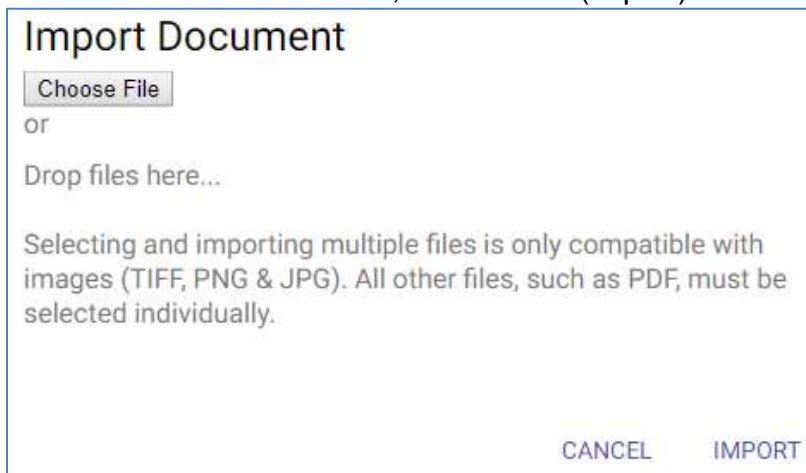
- A new TCM record is created and appropriate metadata is automatically populated from the Munis program (in this example, Vendor Maintenance).



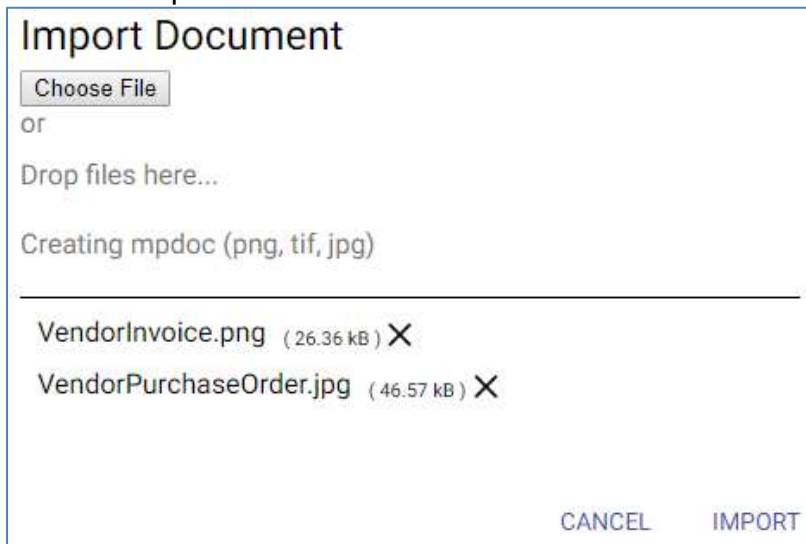
## Attaching Content

To attach a file to the newly created TCM record:

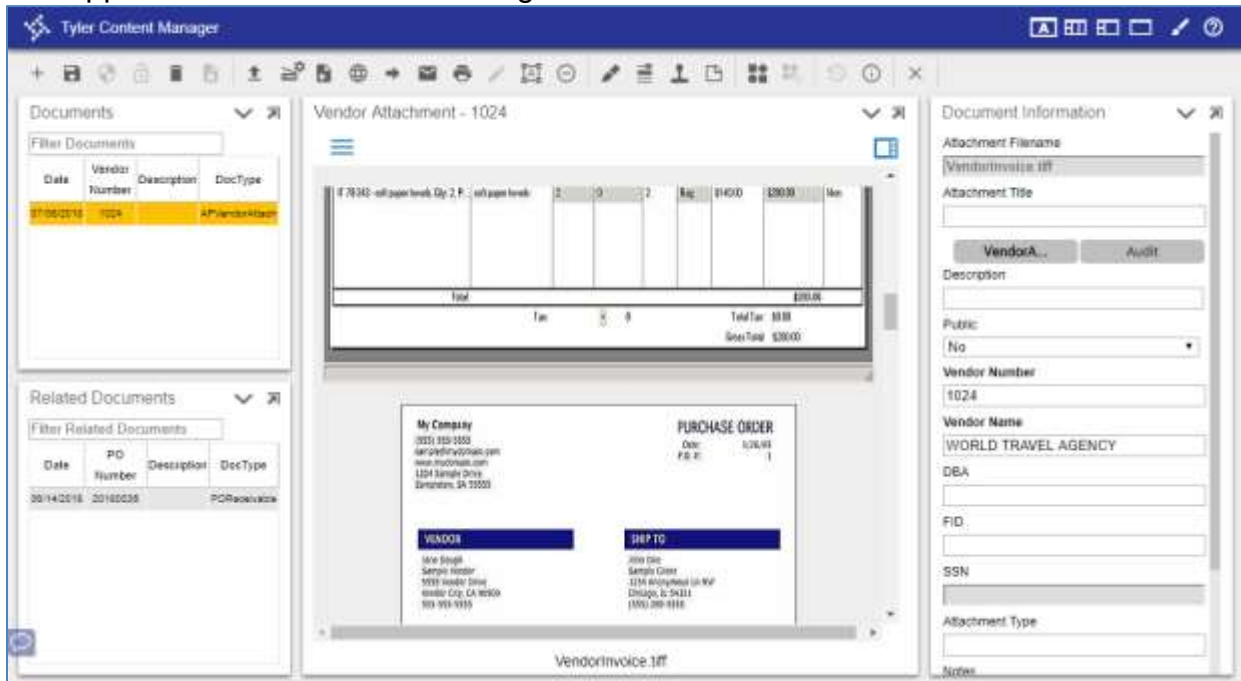
1. On the TCM Viewer toolbar, click the  (import) icon.



Click Choose File or drag a file from another screen and drop it on the above screen. Files can be imported from your local PC or a directory accessible over the network. TIFF, PNG, and JPG image files can be combined into a single multi-page image. In the example below a PNG and JPG are combined into a single multi-page TIFF.





- Click **IMPORT**.  
The application embeds the two images in the Attachment Viewer.



- You should now be able to see the attached document. However, depending on the type of file, if the viewer is unable to display the file type, you will instead be prompted to download the file and open it using a program on the local computer.


TCM is unable to display this attachment within the window. You may download the file once the document is saved.

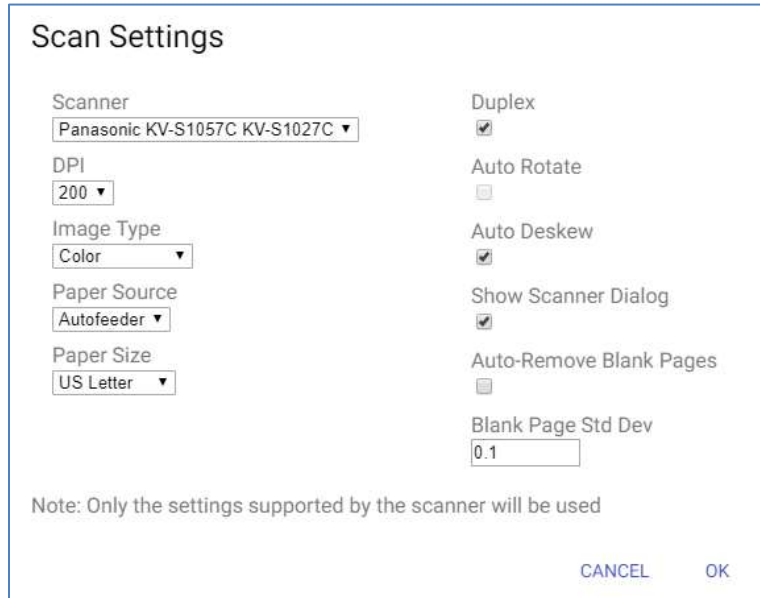
[sample\\_avi.avi](#)


- Click the  (save) icon on the toolbar.
- To exit and return to the Munis program from which you started, click the  (close) icon on the toolbar.

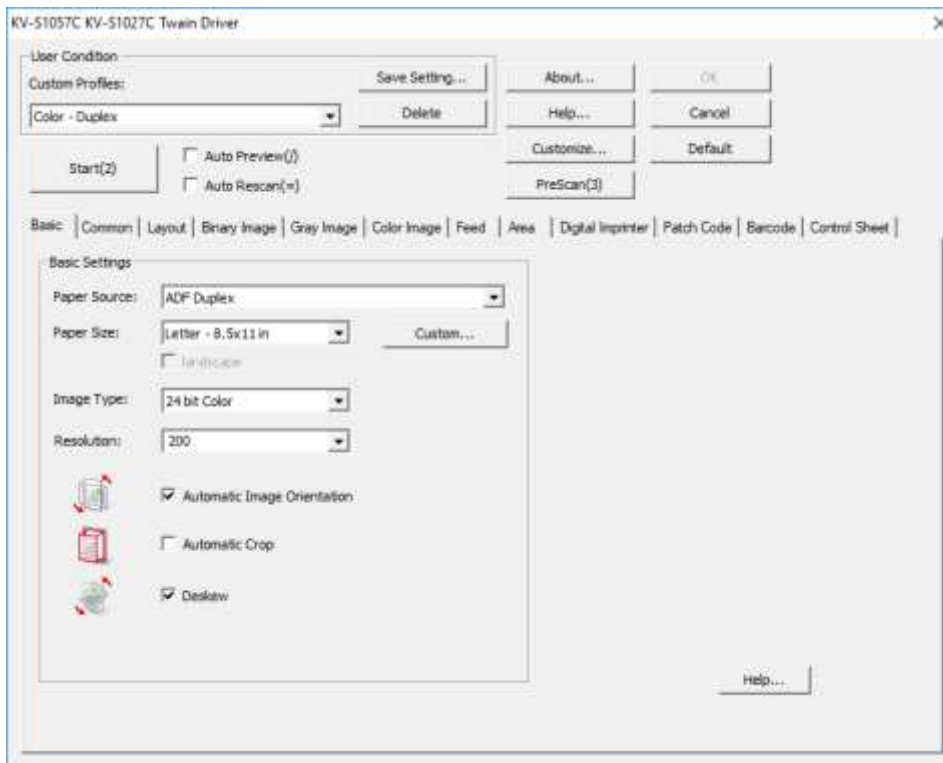
## Scanning Content

To scan a document to TCM:

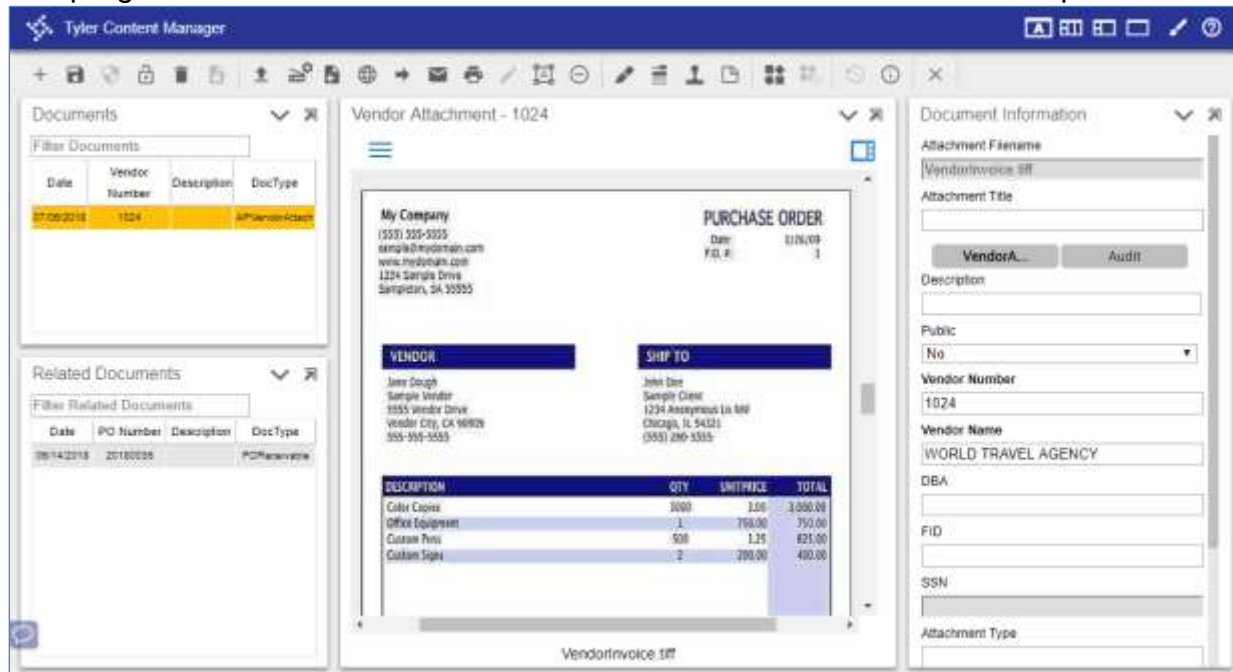
1. Click the  (scan settings, just the cog part) icon on the toolbar and ensure that scanner settings are correct.





2. Click the  (scan) icon (avoiding the scan settings cog part). The program may provide a Scanner dialog box.




3. If presented with a scanner dialog, verify settings, and perform the scan.  
The program scans the document and embeds the file in the Document Explorer.

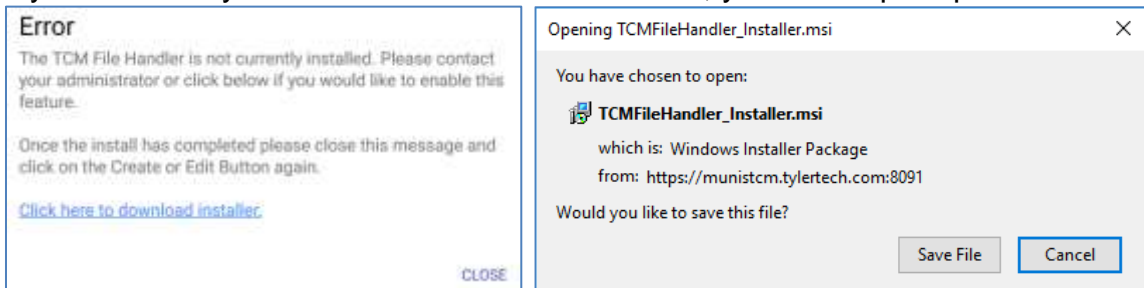


4. Click the  (save) icon on the toolbar.
5. To exit and return to the Munis program, click the  (exit) icon.

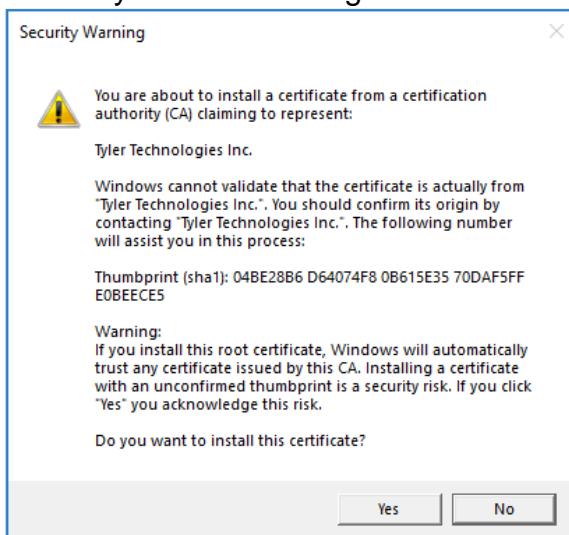
## Creating Content


TCM allows the creation of certain filetype attachments from within the viewer using 3<sup>rd</sup> party applications. This requires the TCM File Handler application to be installed locally as well as the appropriate 3<sup>rd</sup> party applications. To create a new attachment:

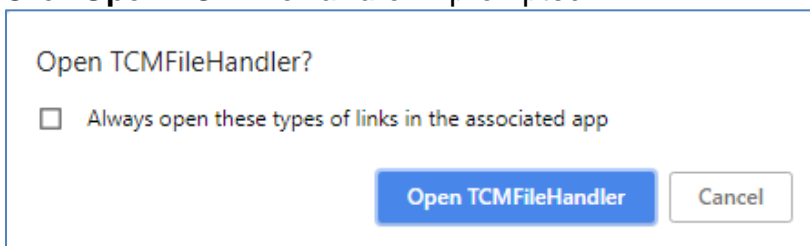
1. On the TCM Viewer toolbar, click the  (create) icon.
2. If you have not yet installed the TCM File Handler, you will be prompted to do so:



3. You may receive warnings about the Certificate, please answer **Yes** to all.

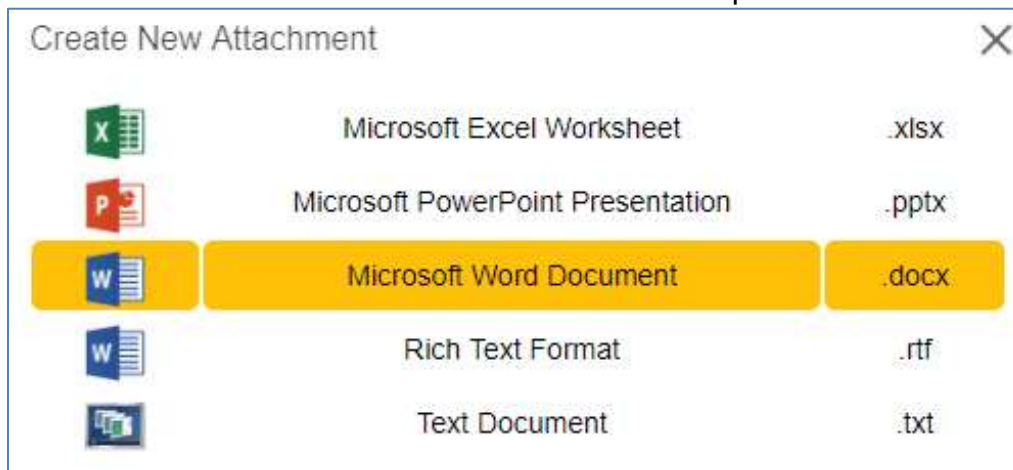


4. Once the TCM File Handler is installed, click the  (create) icon again. Click **Open TCMFileHandler** if prompted.

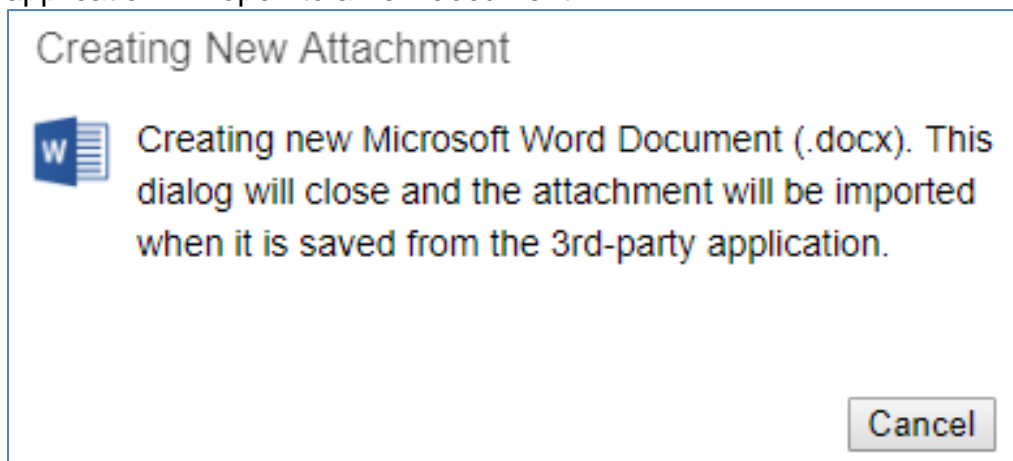


NOTE: You may have to restart your browser.

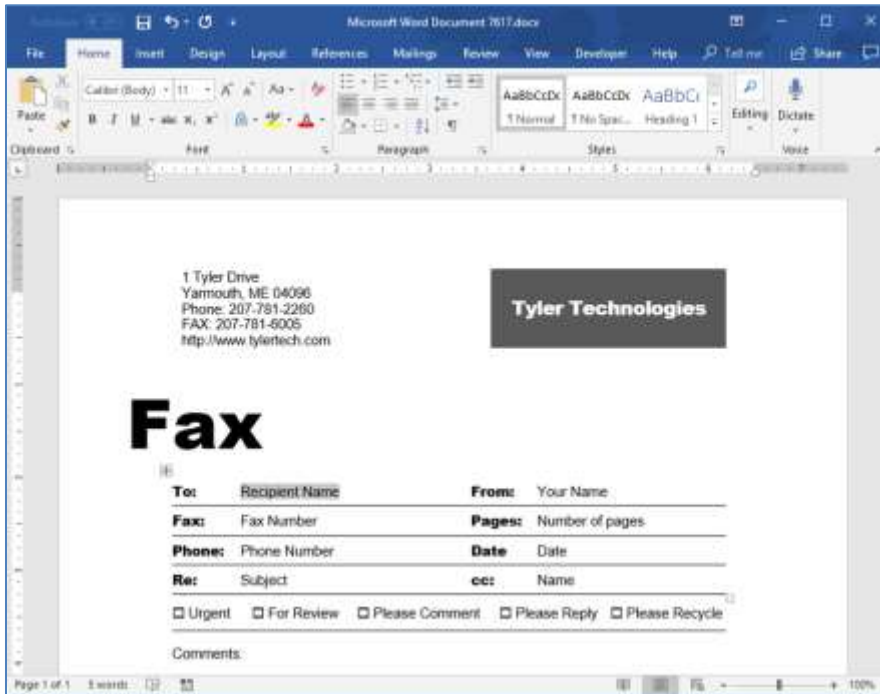
5. Choose the type of file you want to create.  
The list will vary based on your installed applications.  
Microsoft Word Document was chosen in this example:



6. Once selected, a message similar to the one below will display, and the selected application will open to a new document.

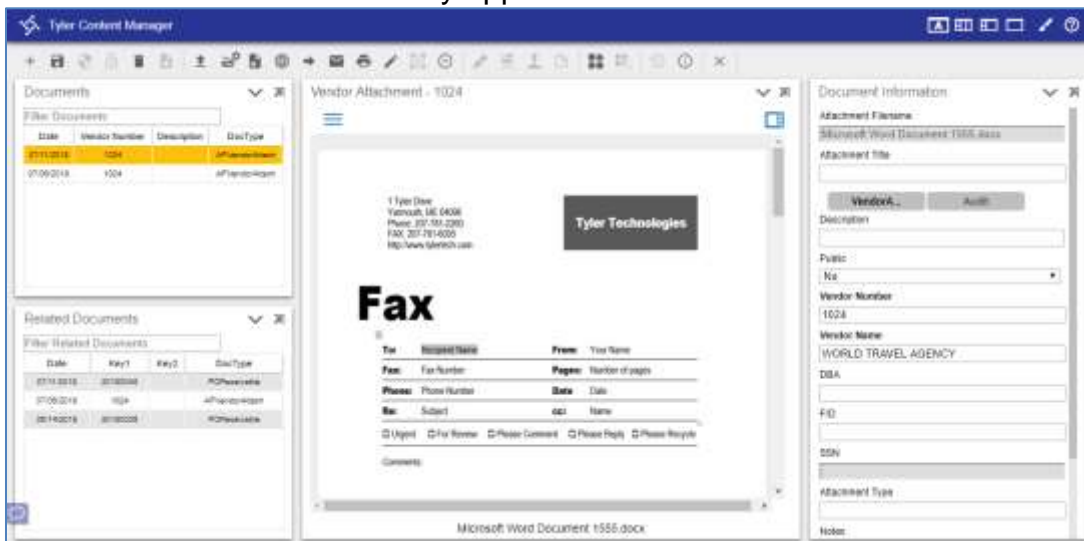


7. Create the new document.




8. When the document is finished, save using the 3<sup>rd</sup> party application's normal saving process, and then close the application (in this case Microsoft Word).


9. The document will automatically appear in the TCM Viewer:

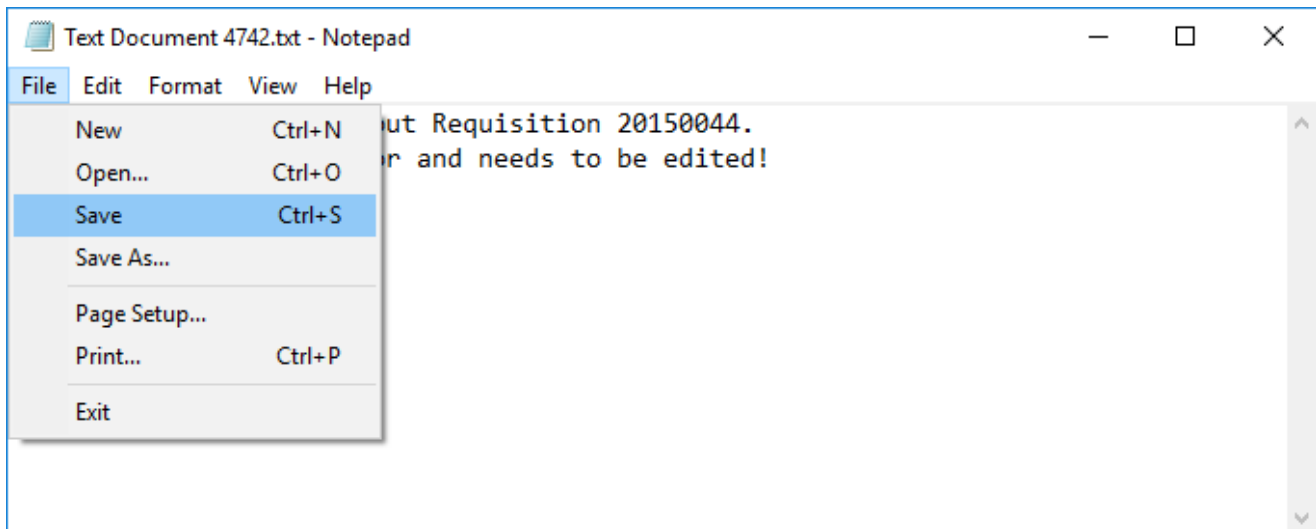


10. The document you created is stored temporarily in the Viewer.


Remember to click the  (save) icon on the toolbar to store the document in TCM.

## Editing Content

TCM can launch 3<sup>rd</sup> party applications to edit certain types of files. Click on the  icon to launch the appropriate 3<sup>rd</sup> party application.




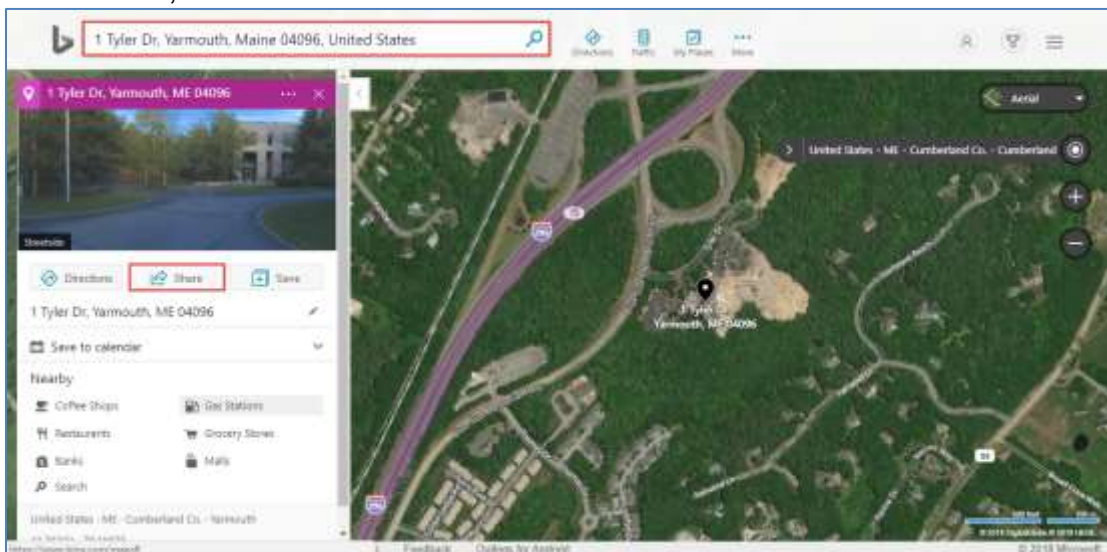
When the edits are complete use the 3<sup>rd</sup> party application's normal saving process. Your changes are automatically updated in TCM. After saving you can safely close the 3<sup>rd</sup> party application.

The document you created is stored temporarily in the Viewer. Remember to click the  (save) icon on the toolbar to store the document in TCM.

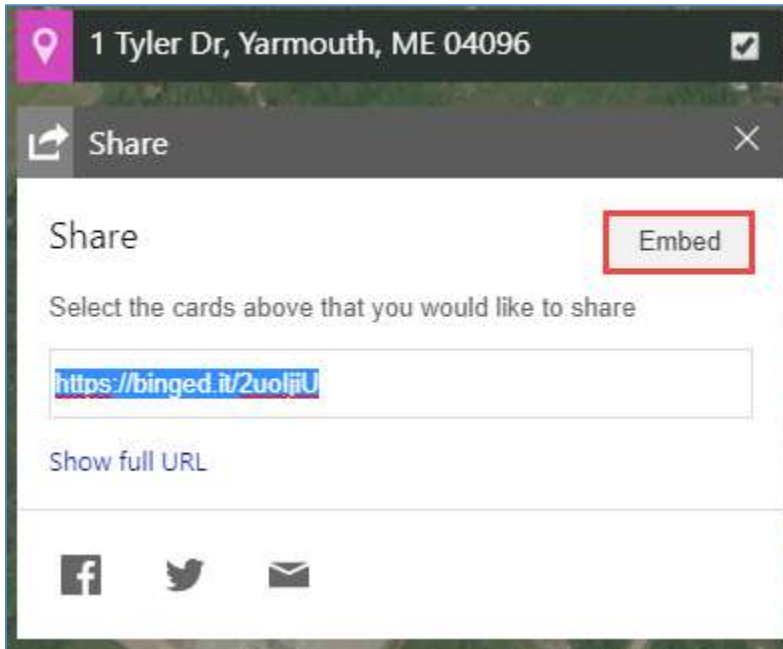
## Embedding Web Content

TCM allows the embedding of certain web content. It will store any sort of URL, though certain content is too complex to display within TCM. It is recommended you use content specifically set up to be embedded such as a map, image, or video. To add embedded content:

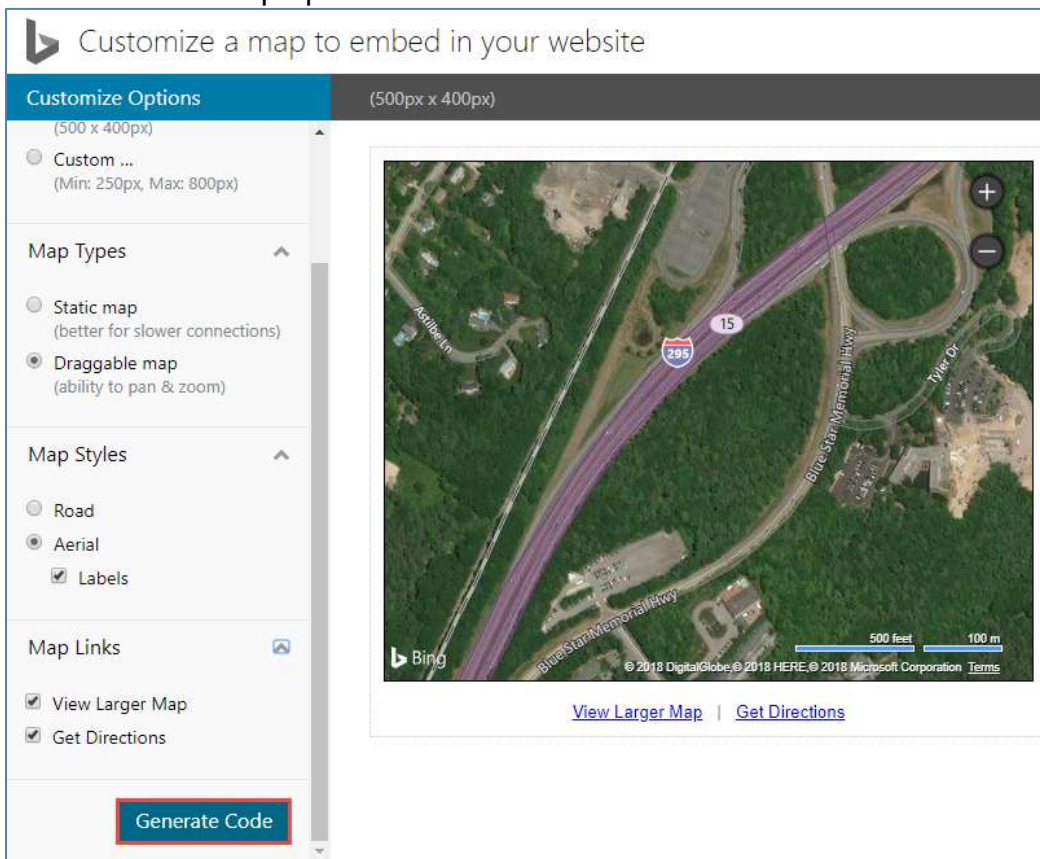
1. On the TCM Viewer toolbar, click the  (embed) icon.
2. TCM will prompt for an embeddable URL.  
Clicking the hyperlinks in the prompt will display instructions on how to generate embeddable URLs.
3. Open a new Browser window or tab and navigate to the content to include in TCM.  
This example will get a BING map of Tyler Technologies in Yarmouth Maine.
4. Go to <http://www.bing.com/maps> and search for “1 Tyler Drive Yarmouth Maine”:
5. Once found, in the left-hand window click **Share**.



6. From the **Share** screen click **Embed**.



7. Customize the map options and then click **Generate Code**.



8. Copy all the lines of code from the **Generated code** window.

```
Generated code x
Copy and paste the following HTML to embed the map on your website
1 <div>
2   <iframe width="500" height="400" frameborder="0" src="https://www.bing.
3   </iframe>
4   <div style="white-space: nowrap; text-align: center; width: 500px; padd
5     <a id="largeMapLink" target="_blank" href="https://www.bing.com/maps
6     <a id="dirMapLink" target="_blank" href="https://www.bing.com/maps/c
7   </div>
8 </div>
```

9. Paste the code into the **Embeddable URL** prompt in TCM.

Embeddable URL

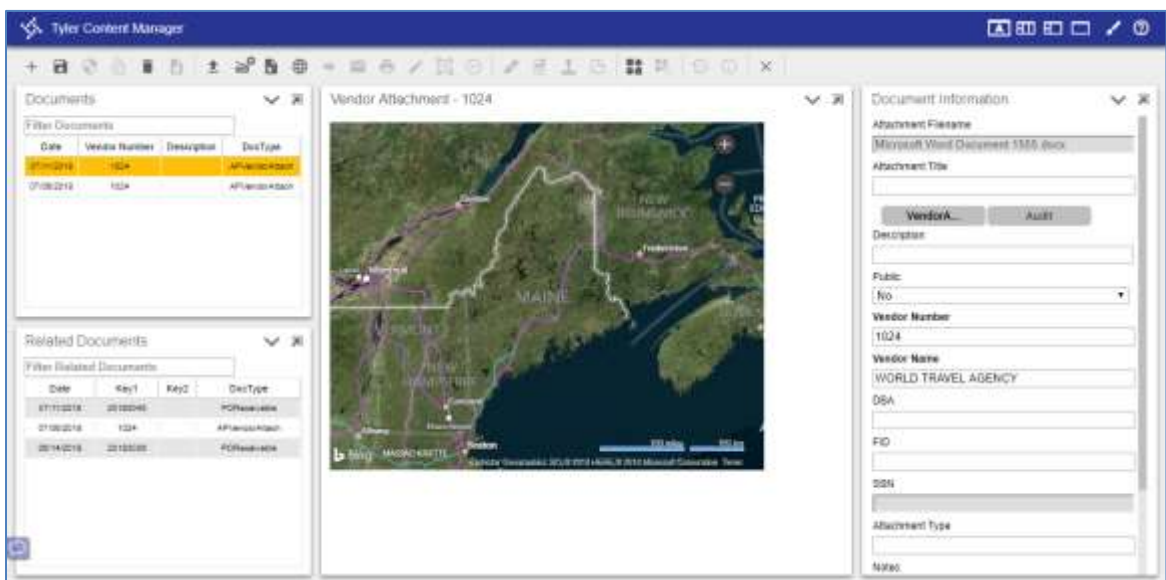
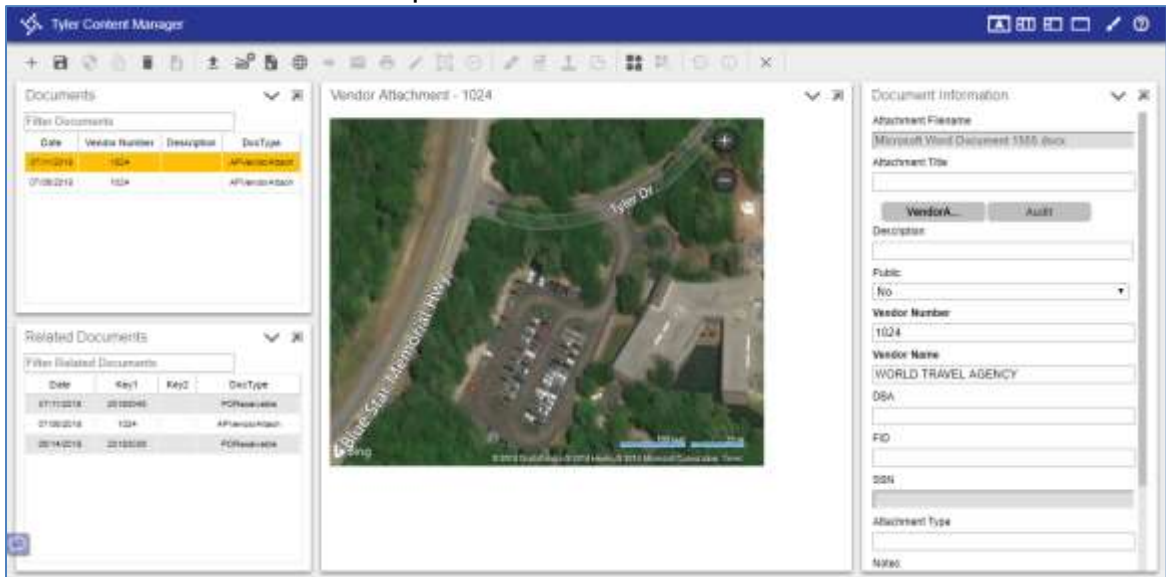
Paste embeddable URL here (can be iframe)

```
<div> <iframe width="500" height="400" frameborder="0" src="https://www.bing.com/map
```

Learn more about generating embeddable URLs from these examples: [YouTube](#), [Google Maps](#), [Google Docs](#)

CANCEL SUBMIT

10. There is now a functional map within TCM that can zoom in or out as needed:



## Submitting TylerForms to TCM

Any Munis documents that are generated and printed through TylerForms processing can be automatically archived to TCM SE. In order to use this functionality, TylerForms must be installed and your forms must be configured for archiving.

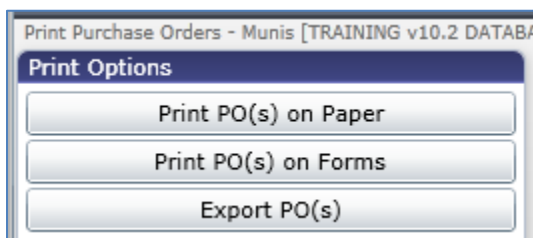
Examples of TylerForms documents:

- Accounts Payable Check/EFT
- Business License Application/Bill
- Business License Certificate
- General Billing Invoice
- Inventory Pick Ticket
- Personnel Action Form
- Permit
- Purchase Order
- Payroll Check/Direct Deposit
- Student Activity Check
- Tax Bill
- Form W-2
- Form 1099
- Utility Bill
- Utility Bill Delinquent Notice
- Work Order

Generating TylerForms output varies within each Munis product. The following is an example of the process and the steps necessary to output correctly formatted data to the TylerForms process for archival into TCM. If your TylerForms have been configured to archive to TCM but you are unsure of how to generate (print) your forms, contact the appropriate Munis Technical Support team.

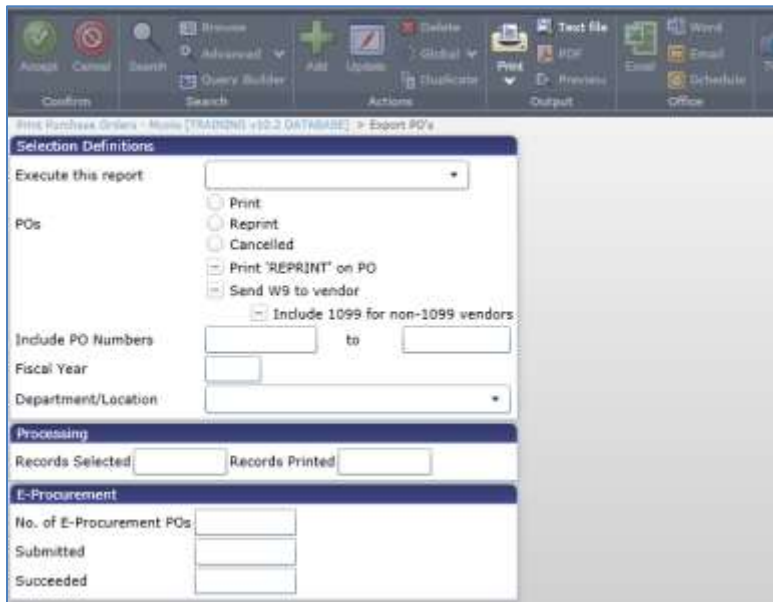
To submit forms to TCM SE:

1. Complete the standard process to print a Tyler form, for example, to print a purchase order.

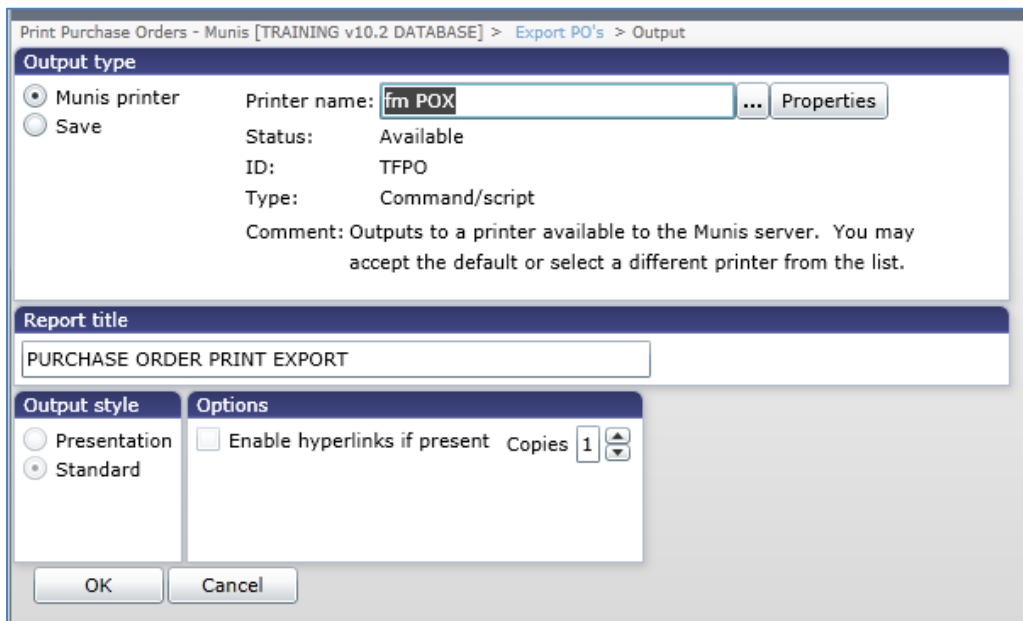


2. Click the **Export [TylerForm Type]** button; in this example, Export POs. The program opens the appropriate Munis program.

- Complete the selection parameters.



- Click **Define** to selection criteria.
- Click **Accept**, and then click **Select**.
- Once the records are selected, click **Print** on the ribbon to display the **Output** dialog box.



- Verify that the Munis Printer option is selected.
- In the **Printer** name box, click the field help button to select an available printer.
- Click **OK**.  
The program displays processing details in the lower-left corner of the dialog box.

Processing PO: 20130061

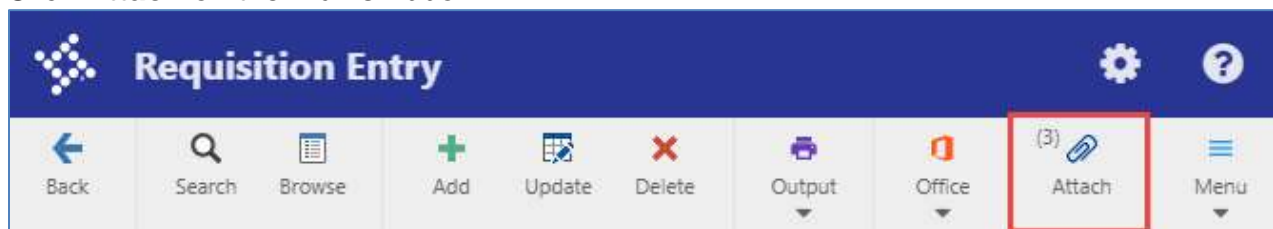
## Retrieving Content

Files are retrieved from TCM SE in the same manner that they are captured. Use the Attach button on the Munis ribbon to interface with TCM to retrieve content

Some files are **not** retrievable from the Munis program that they were captured from due to Munis processing restrictions. For example, AP invoice data is not accessible in the AP Invoice Entry program once it is posted. Therefore, you must go to a program that can access the Munis data, such as Vendor Inquiry or Modify Invoices, navigate to the appropriate record, and click the Attach button from that program.

To retrieve content:

1. In Munis, navigate to the Munis record for which to retrieve a file.
2. Click **Attach** on the Munis ribbon.



3. On the **Document Mappings** screen, select a mapping and click **View Documents**.

**Document Mappings** ✕

Attached Documents

Attachment Type	Document Type	Read Only	Count	Required
Requisition Attachment	Requisition Attachment		3	

.....

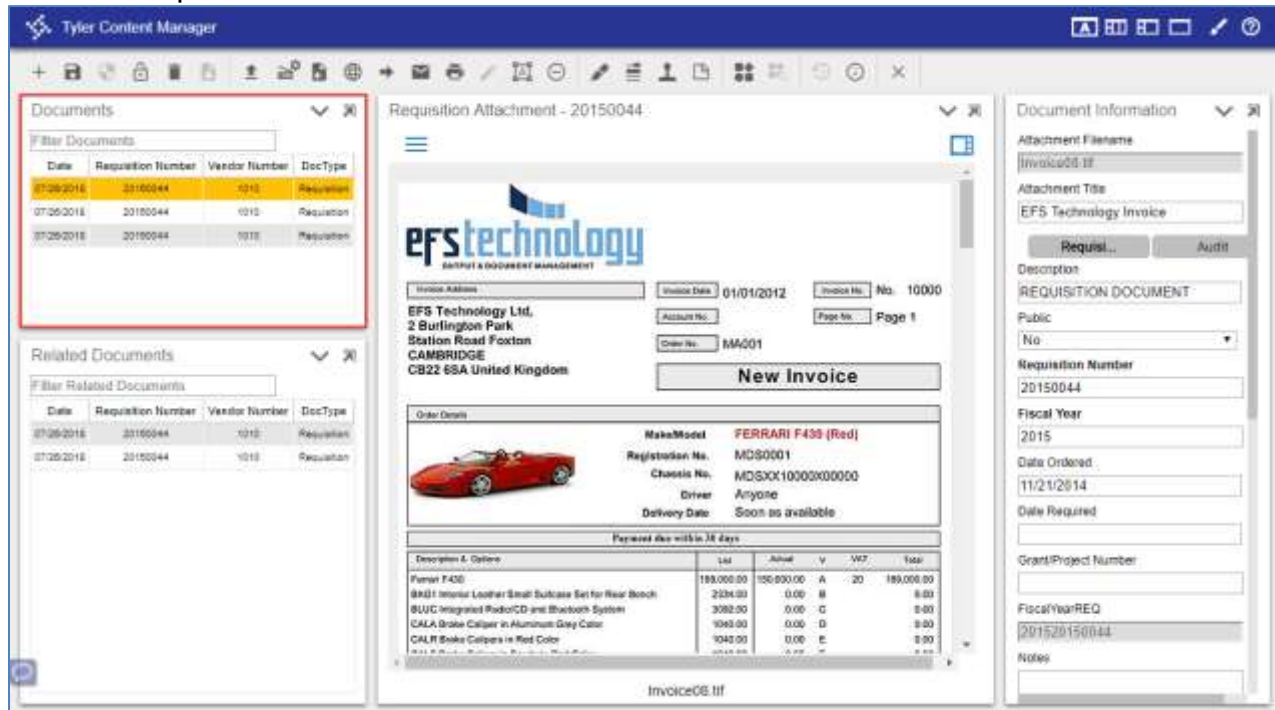
Associated Documents

Document Title	TCM Document Type	Read Only	Count
Contract Attachment	Contract Attachment		0
Contract/Agreement	Contract/Agreement	Yes	0
PO Attachment	PO Attachment	Yes	0

📁 View Documents
TCM Version: 2018.2.3.1
 Show Counts

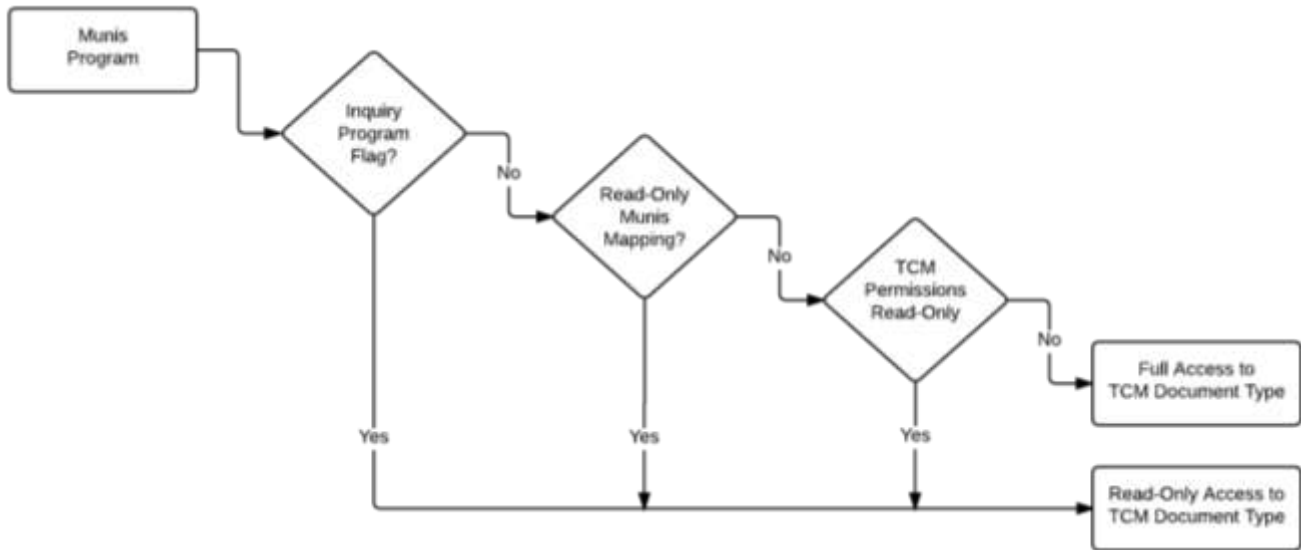
Read-only mappings are indicated by a “Yes” in the Read Only column and are intended for retrieving only.

- In TCM, select the document you want to view from the Documents panel or Related Documents panel.

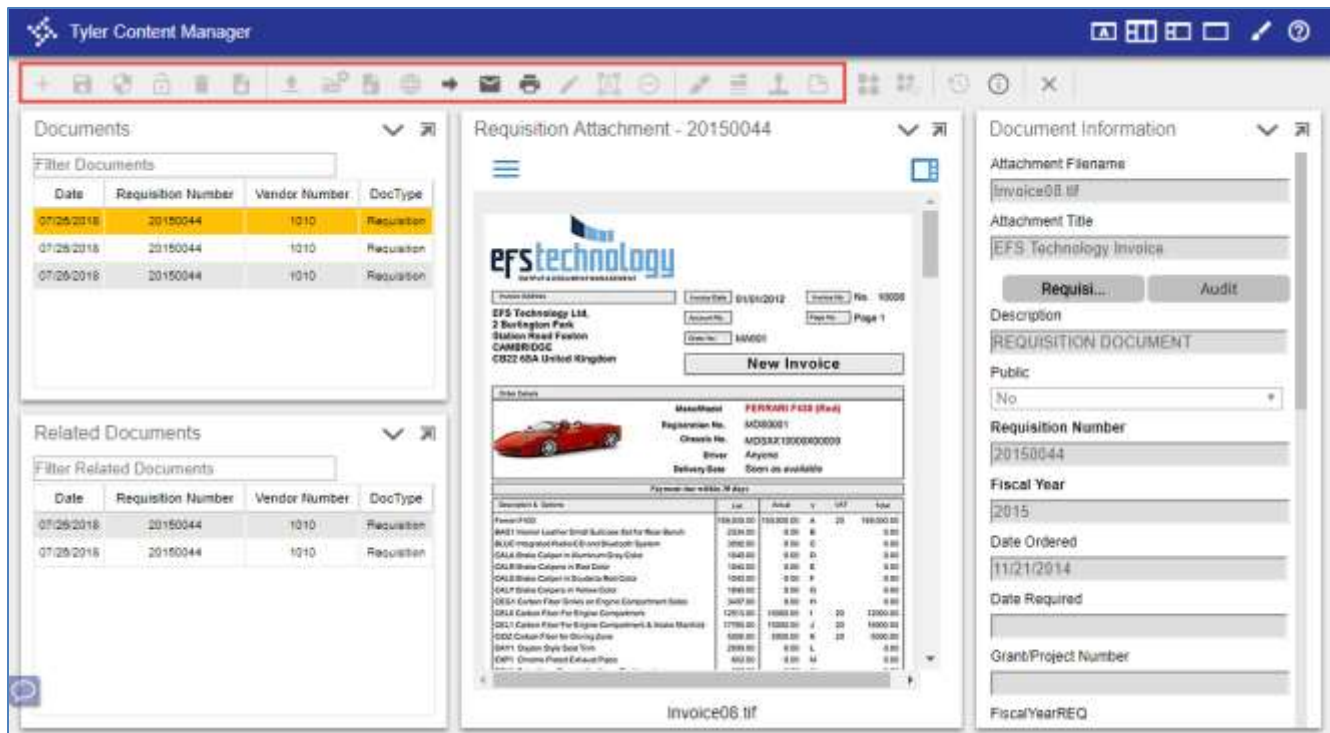


The attached file displays in the Attachment Viewer panel and the Document's metadata appears in the Document Information panel. Provided TCM is not in read-only mode, you can Add additional documents, Edit or Delete existing documents, add Annotations and so on.

The TCM Viewer may impose read-only limitations based on a range of criteria, diagramed below:

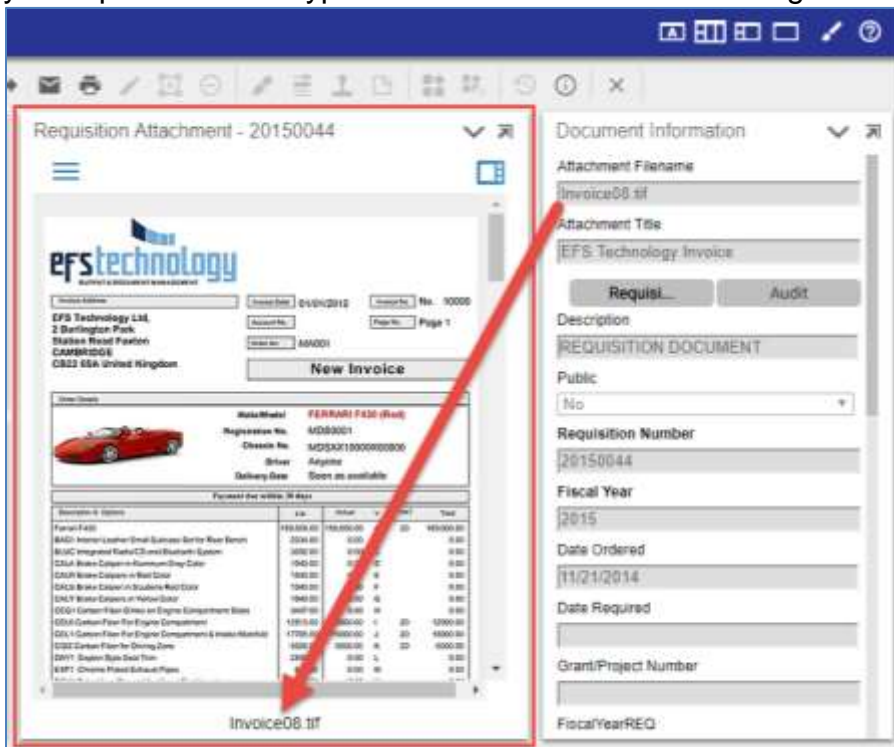


If the viewer opens in read-only mode, several of the options will be disabled. For example, you will not be able to Add, Edit or Delete a document. You will be able to Export, Email and Print it however, as pictured below:

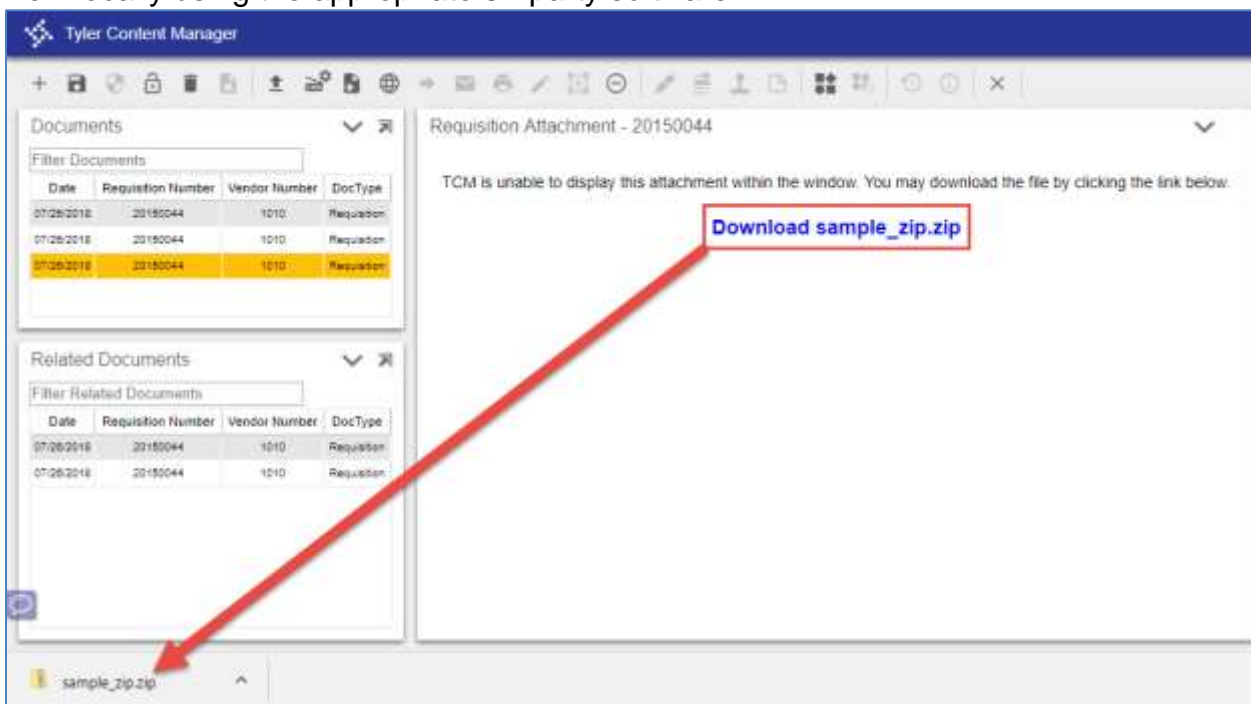


## Viewing Options

The Attachment Viewer displays most common file formats within the browser itself, allowing you to preview most types of attachments without having to leave TCM.




File formats that the Attachment Viewer cannot display give you the option to download and view locally using the appropriate 3<sup>rd</sup> party software.

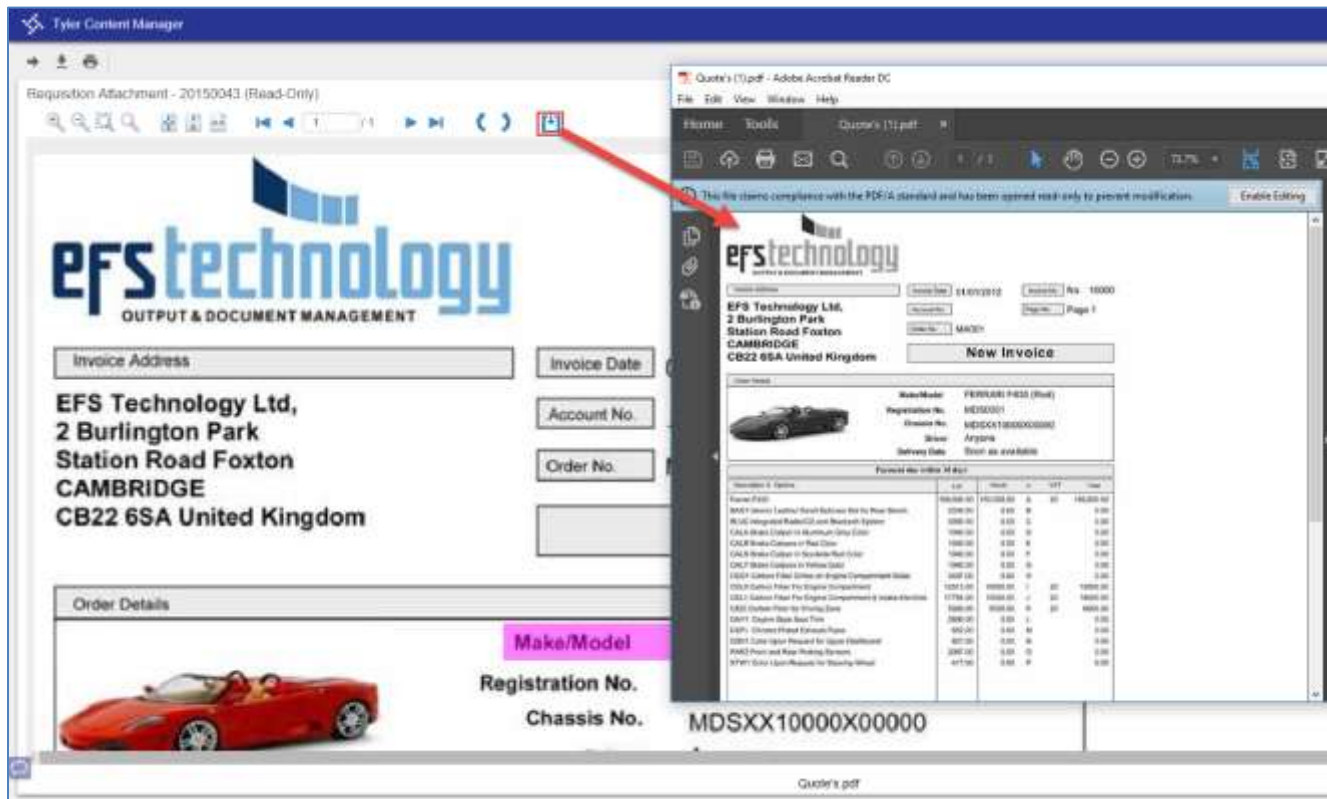


## Sharing Content

Content within TCM will occasionally need to be shared with someone without direct access to TCM. Several options are outlined below.

### Download the original file attachment

One method for downloading the original file attachment is to click the  icon in the Viewer panel.



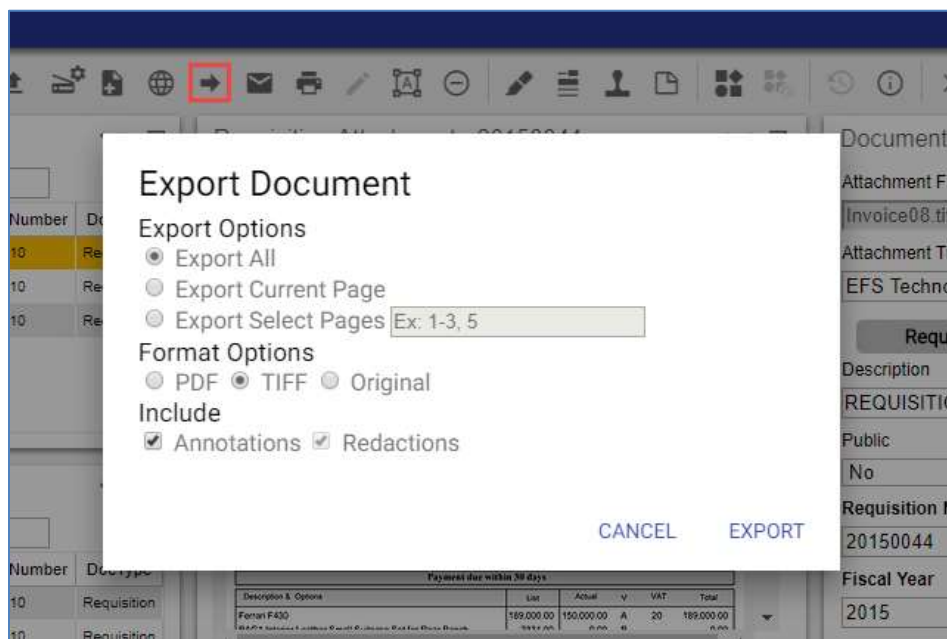
#### Notes:

- Most image files are converted to TIF when submitted to TCM. This allows TCM to add redactions and to combine multiple images into a single multi-page image. As such you would receive the TIF version of any image file you originally submitted.
- Redactions are sometimes not included when using this method. If redactions must be included, you should instead use Export or Print.
- Sometimes the original file downloads as black and white, rather than color.

## Export to file

To export Attachments, click the  icon and select from the options as below:


1. Pages:  
All, Current Page or Select Pages.
2. File Types:  
PDF, TIFF, or Original.
3. Includes:  
Annotations (Highlights, Text Stamps, Sticky Note).  
Redactions (requires special permissions to remove).

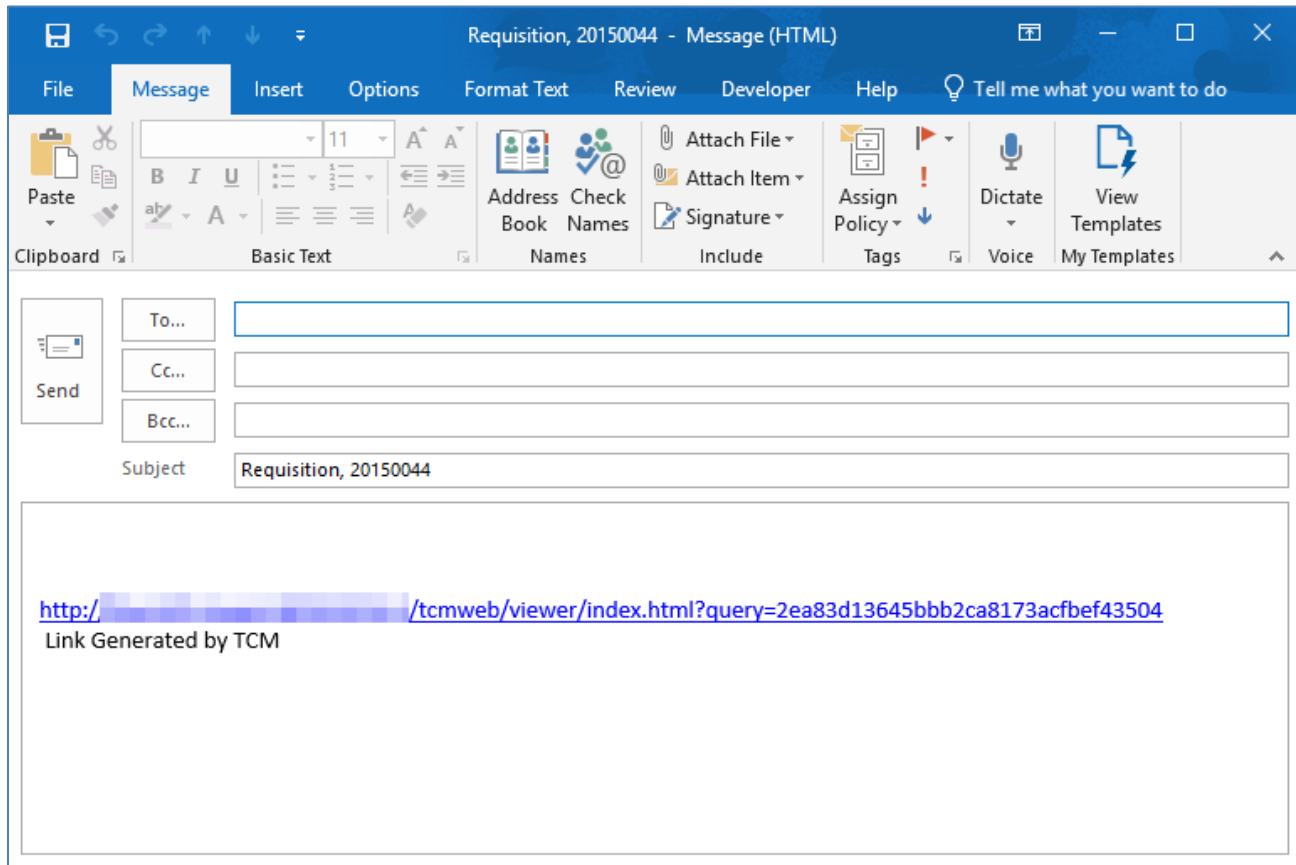


### Notes:

- Exporting to PDF excludes Annotations.
- Exporting to Original excludes both Annotations and Redactions.

## Email link to a file

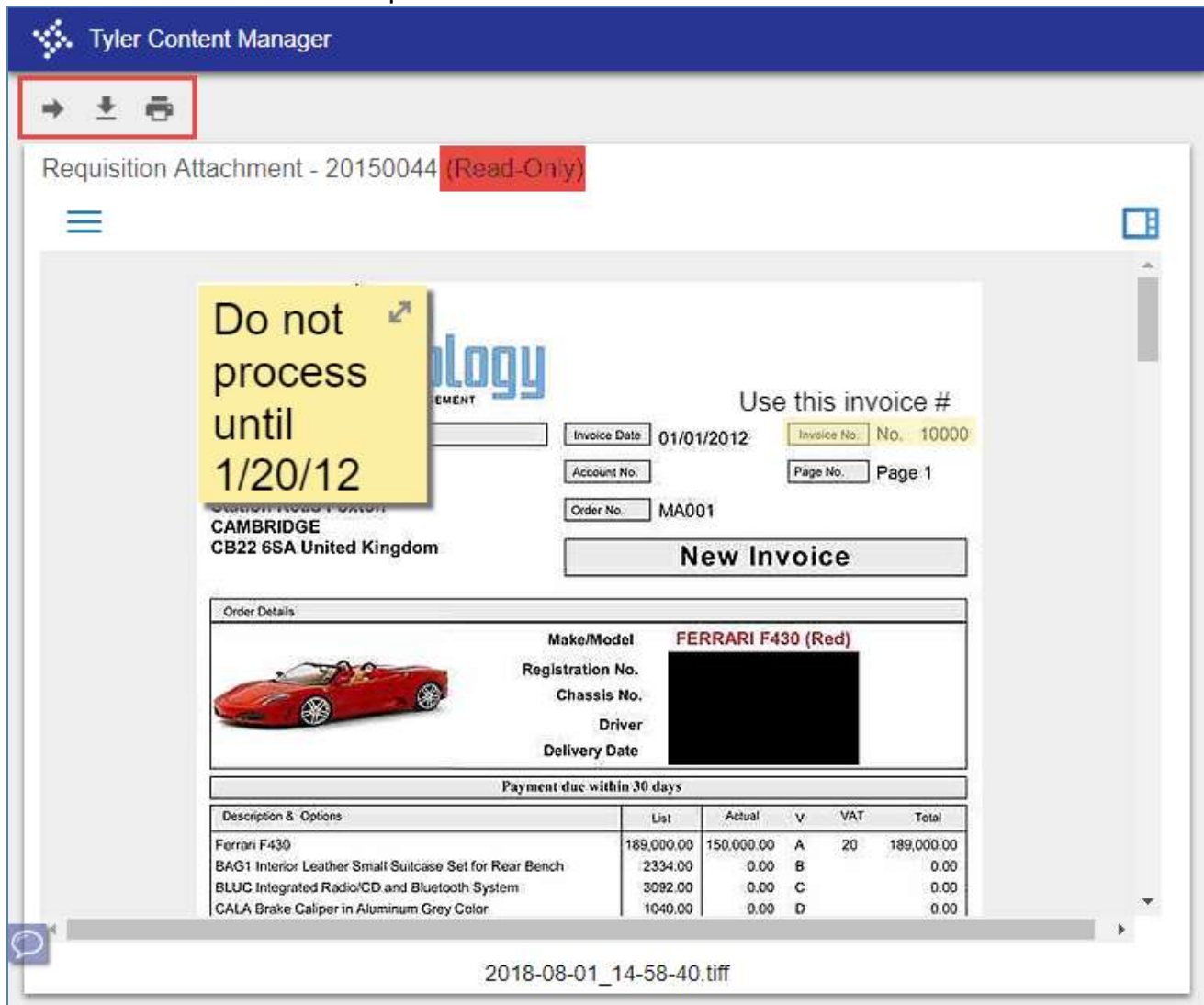
TCM works with e-mail software to generate an externally usable link to the currently selected document. Clicking the  icon will open a new message in your default e-mail software with a link in the e-mail's body like the one below:



Note: the link launches a specialized version the TCM viewer with limited functionality and read-only level user permissions. The specialized viewer is detailed below.

### Limited viewer (from email link)

When a user opens TCM from an email link, a limited version of the full TCM viewer. The limited edition is read-only and the user is only able to export, download and print the attachment. Below is an example of the viewer:



Requisition Attachment - 20150044 (Read-Only)

Do not process until 1/20/12

Use this invoice #

Invoice Date: 01/01/2012    Invoice No. No. 10000  
 Account No.    Page No. Page 1  
 Order No. MA001

**New Invoice**

Order Details

Make/Model: **FERRARI F430 (Red)**  
 Registration No. [Redacted]  
 Chassis No. [Redacted]  
 Driver [Redacted]  
 Delivery Date [Redacted]

Payment due within 30 days


Description & Options	List	Actual	V.	VAT	Total
Ferrari F430	189,000.00	150,000.00	A	20	189,000.00
BAG1 Interior Leather Small Suitcase Set for Rear Bench	2334.00	0.00	B		0.00
BLUC Integrated Radio/CD and Bluetooth System	3092.00	0.00	C		0.00
CALA Brake Caliper in Aluminum Grey Color	1040.00	0.00	D		0.00

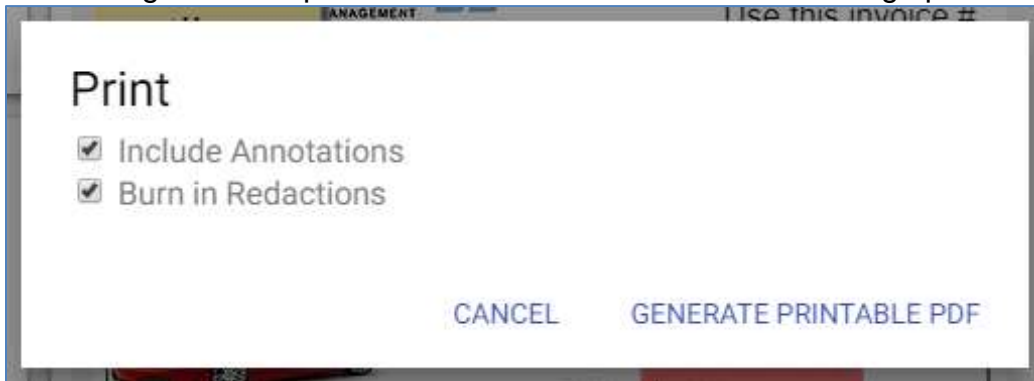
2018-08-01\_14-58-40.tiff

#### Notes:

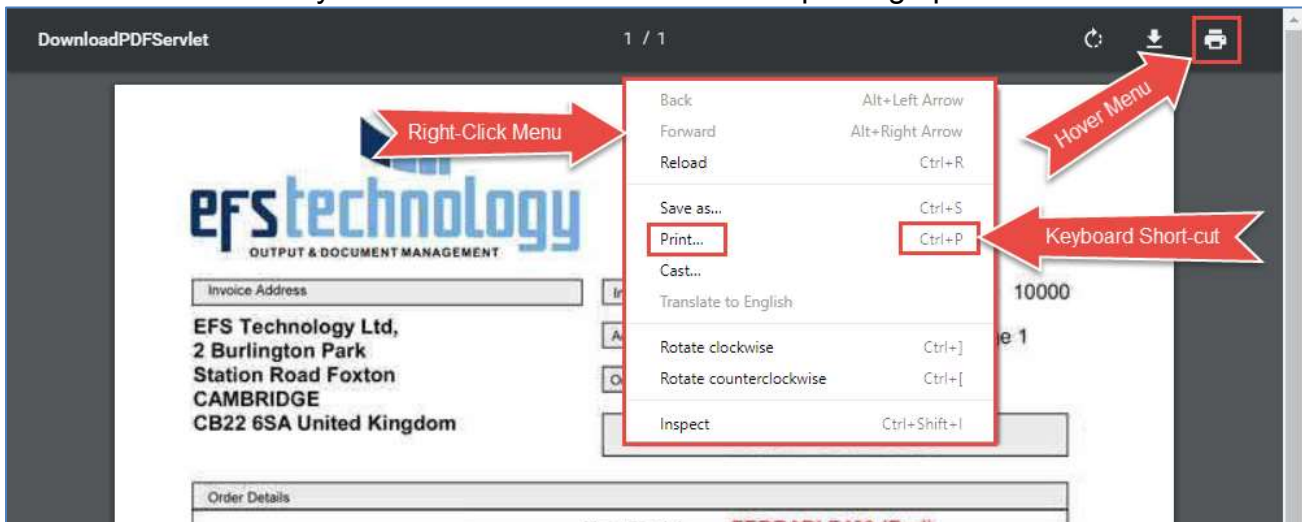
- The toolbar has only the Export, Download and Print icons.
- The viewer is in read-only mode and the redaction is not transparent.
- Annotations are never included when exporting, downloading, or printing (despite the options being checked).
- Redactions are **always** included (despite the option being unchecked when exporting as Original).

## Print to a file

TCM can generate a printable PDF. Click the  icon to bring up the TCM print dialog.




Clicking **GENERATE PRINTABLE PDF** will open a PDF document on a new tab in most browsers. From here you can use the browser's default printing options.



### Note:

- As of this writing the Annotations did **not** appear on the printable PDF even when the option to include them was checked. This is likely a bug that will be addressed in a future patch.
- The Redactions appear when **Burn in Redactions** is checked.

## Replacing Content

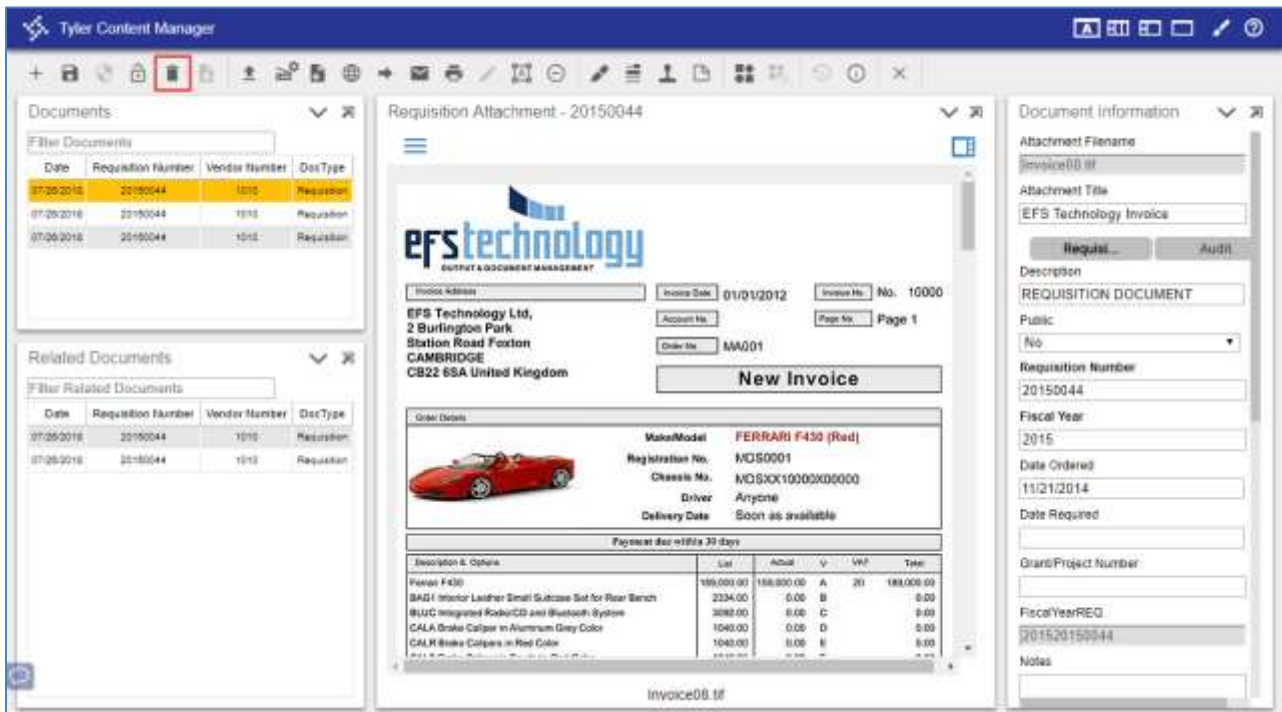
If the current file attachment needs to be replaced click the  icon to remove just the file attachment and retain the metadata. Then use any of the Capturing Content options to add a new file attachment.

## Deleting Content

Files can be deleted from TCM directly from the user interface. The user must have delete privileges to perform a deletion.

To delete content:

1. In Munis, navigate to the program and the record for which to delete content.
2. Click **Attach** on the Munis ribbon.
3. Select the appropriate mapping and click **View Documents**.  
The program opens TCM and displays a list of documents associated with the selected Munis record.
4. On the Documents list in TCM, highlight the document to delete.
5. Click **Delete** on the toolbar.



The screenshot shows the Tyler Content Manager interface. On the left, there are two panels: 'Documents' and 'Related Documents', both containing tables with columns for Date, Requisition Number, Vendor Number, and DocType. The first row in both tables is highlighted in yellow. The main area displays a 'Requisition Attachment - 20150044' for 'EFS Technology Ltd'. It includes a 'New Invoice' button and a table of 'Payment Items' for a Ferrari F430. The table has columns for Description & Options, List, Actual, V, W/P, and Total.

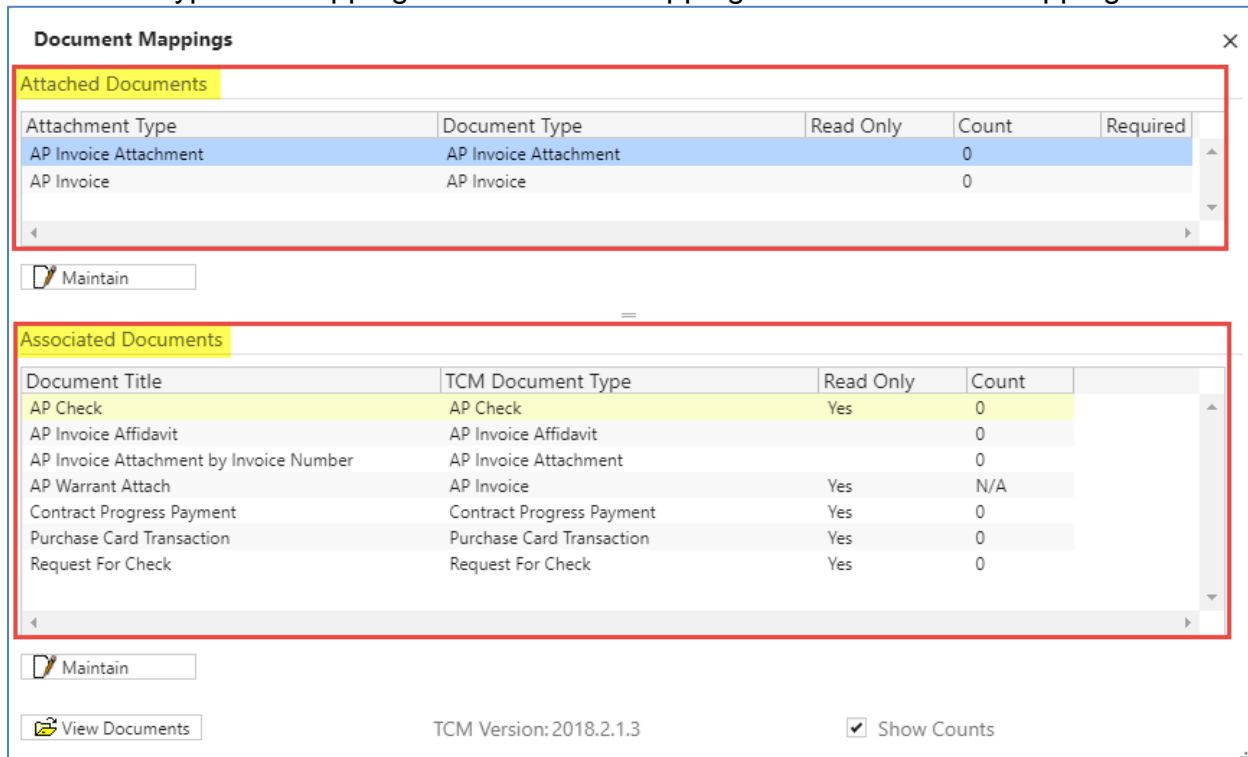
Description & Options	List	Actual	V	W/P	Total
Ferrari F430	189,000.00	188,800.00	A	20	188,000.00
BAG Interior Leather Small Subcase Set for Rear Bench	2334.00	0.00	B		0.00
BLUC Integrated Radio/CD and Bluetooth System	3082.00	0.00	C		0.00
CALA Brake Caliper in Aluminum Gray Color	1040.00	0.00	D		0.00
CALH Brake Caliper in Red Color	1040.00	0.00	E		0.00

The program deletes the **selected** TCM Record, both the file attachment and any applicable metadata. The example above, only the first TCM record in the Documents Panel is deleted, leaving the bottom non-selected ones.

## Understanding Munis Mappings

A mapping is how Munis submits and retrieves document attachments in TCM that are specific to the active Munis record.

There are two types of mappings. Attachment Mappings and Associated Mappings.



Attachment Type	Document Type	Read Only	Count	Required
AP Invoice Attachment	AP Invoice Attachment		0	
AP Invoice	AP Invoice		0	

Document Title	TCM Document Type	Read Only	Count
AP Check	AP Check	Yes	0
AP Invoice Affidavit	AP Invoice Affidavit		0
AP Invoice Attachment by Invoice Number	AP Invoice Attachment		0
AP Warrant Attach	AP Invoice	Yes	N/A
Contract Progress Payment	Contract Progress Payment	Yes	0
Purchase Card Transaction	Purchase Card Transaction	Yes	0
Request For Check	Request For Check	Yes	0

- Attachment Mappings:
  - o Display in the Attachments Panel.
  - o Total count of all the mappings in this panel are displayed on the Ribbon.
  - o Gather Metadata from Munis Object (Employee, Vendor, PO, etc.).
  - o Are available to all screens using the same Munis Object.
  - o Will override (hide) Associated Mappings with the same search criteria.
    - Mappings with the same search criteria are duplicates.
  
- Associated Mappings:
  - o Displayed in the Associated Panel.
  - o Not included in the count on the Ribbon.
  - o Gather Metadata by scraping the screen for Munis Record values.
  - o Are only available from the current screen.
  
- All Mappings:
  - o Provided by Munis can be disabled but cannot otherwise be modified.
  - o Can be set to be Read-Only (only used to retrieve attachments)
  - o Users with the correct permissions can create and modify custom mappings.

## Understanding Munis Attachment Counts

Several places in Munis attempt to display an accurate count of records stored in TCM. There are a variety of technical challenges that prevent Munis being able to display the count with 100% accuracy. This section will touch on some of these challenges but will primarily aim to explain the current behavior and limitations. Rest assured development teams revisit this issue with every release, finding new ways of linking Munis and TCM to improve this experience.

### Legacy Munis Ribbon Counts

Legacy Munis (sometimes called Genero) uses the mapping screen pictured below. While the mapping screen gathers counts for all mappings, only the “Attached Documents” section is totaled as the “Attachment Count”.

**Document Mappings**

Attached Documents

Attachment Type	Document Type	Count
Employee Attachment	Employee Attachment	0
1095-B	1095-B	1
Employee Accrual Buyout Election Choices	Employee Accrual Buyout	0
Employee Benefits	Employee Benefits	1
Employee Certificate/License	Employee Certificate/License	0
Employee Contract	Employee Contract	0
Employee Correspondence/Letters	Employee Correspondence/Letters	0

Associated Documents

Document Title	Count
Criminal History Authorization (All Projections/Processes)	1
Criminal History Results (All Projections/Processes)	1
Employee Attachment (All Projections/Processes)	0

View Documents      TCM Version: 2018.2.1.3       Show Counts

Munis displays the Attachment Count on the ribbon of most screens featuring a paperclip icon.



Munis also displays a paperclip icon in many of the browse screens.

The icon functions as an indicator that the Attachment Count is greater than zero.

	Emp #	Last Name	First Name
	100	JONES	TIMOTHY
	101	JONES	JEAN
	102	CHIN	AMY

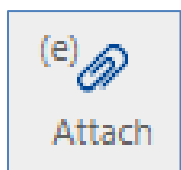
When gathering counts from TCM, Legacy Munis performs a TCM search for every applicable Attachment Mapping and Associated Mapping. It must do these searches for all records returned by the initial search in Munis. For example, if your search in Employee Master returns 100 employees and there are 50 mappings Munis would have to perform 5000 TCM searches to gather a **Live** Attachment Count for your current session. Legacy Munis is asynchronous, which means it would need to wait until all 5000 searches were complete before it could finish loading the screen.

Due to performance concerns, Legacy Munis screens keep a cache of past TCM counts rather than request a new count from TCM each time Munis searches for records that may or may not have attachments. The limitation here is that documents added to or removed from TCM will invalidate the cache. The cache is automatically re-built for the active Munis record whenever a user launches the Mapping screen by clicking on the ribbon paperclip.



NOTE: When the user goes into TCM, Munis is unable to track changes to attachments for the current record. To indicate the potential need to refresh cache, Munis places a “?” in place of the Attachment Count.

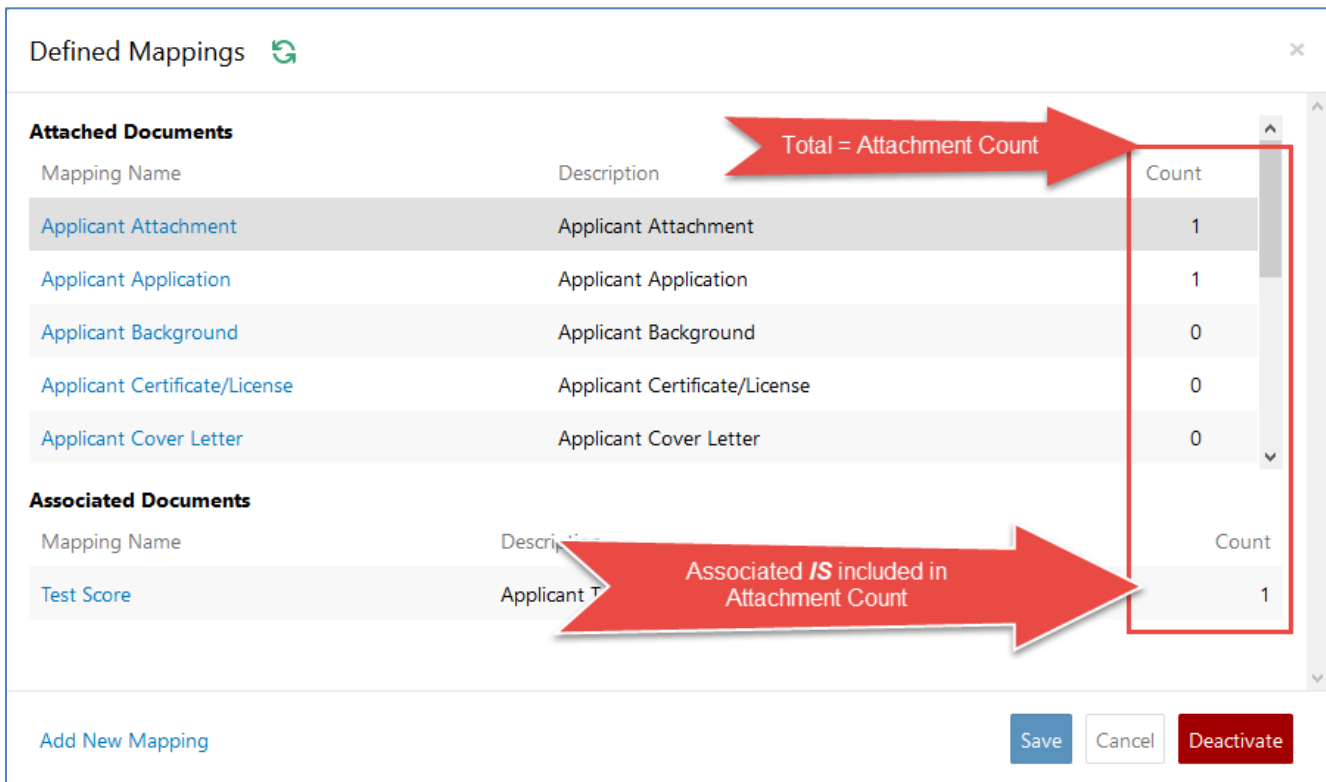
When the user returns to Munis, the “?” remains, indicating a stale cache. When the user retrieves or navigates to a Munis record that has a “?” in place of the Attachment Count, Munis will automatically refresh the cache. Unfortunately, this means the user needs to navigate away from the current record and then return to it to trigger a cache refresh for that record.



NOTE: If Munis is unable to reach the TCM server to gather counts, or if a mapping is misconfigured, Munis will place an “e” for “Error” in place of the Attachment Count. If you see this, you should contact your system administrator or Munis Support.

## Munis.NET/Centrals Ribbon Counts

Munis.NET uses the mapping screen pictured below. When considering Attachment Counts the biggest difference between Legacy and .NET is that .NET is synchronous. This means Munis.NET can request a **Live** Attachment Count and continue to load the screen while it waits for the count results.



The screenshot shows a 'Defined Mappings' dialog box with two tables. The 'Attached Documents' table lists various mapping names and their counts. The 'Associated Documents' table lists 'Test Score' with a count of 1. Red arrows and text highlight that the counts are live and include associated items.

Mapping Name	Description	Count
Applicant Attachment	Applicant Attachment	1
Applicant Application	Applicant Application	1
Applicant Background	Applicant Background	0
Applicant Certificate/License	Applicant Certificate/License	0
Applicant Cover Letter	Applicant Cover Letter	0

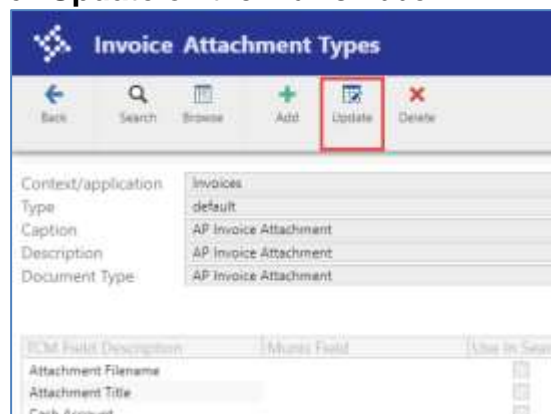
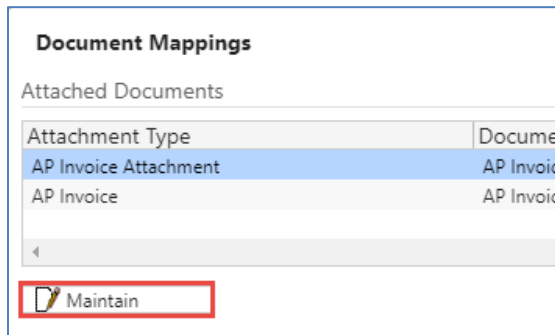
Mapping Name	Description	Count
Test Score	Applicant T	1

There are no performance concerns with synchronous processing, so Munis.NET does not cache counts and always provides a **Live** Attachment Count.

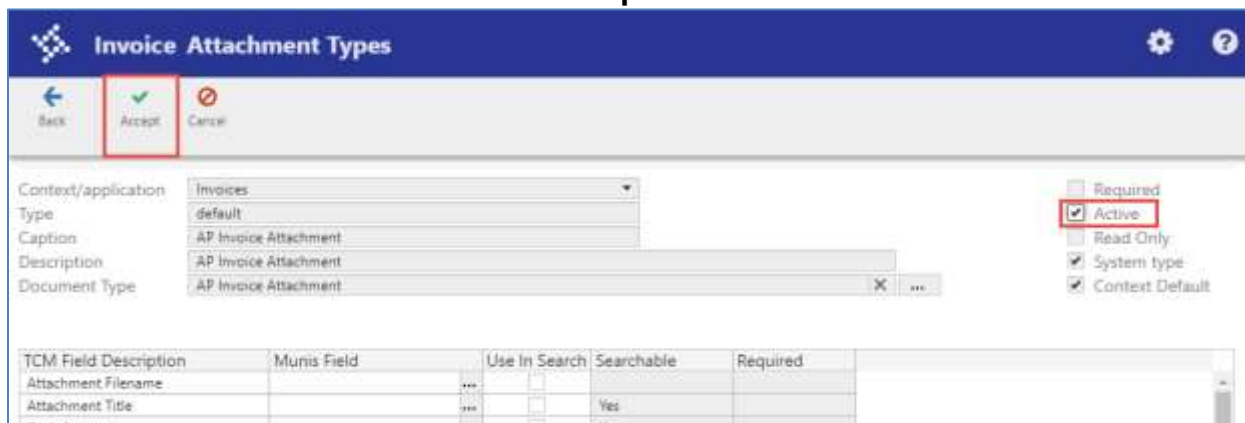
## Disabling Standard Mappings

Newer versions of Munis allows users to disable Munis provided (standard) mappings.

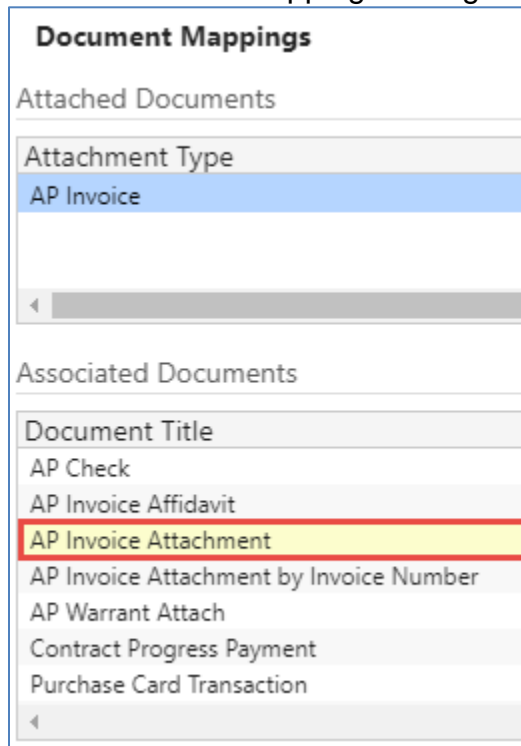
1. Find and select the Attachment Mapping to Disable.
2. Click **Maintain** under the appropriate document map listing.
3. From the Mapping Admin screen, click **Update** on the Munis ribbon.



4. Uncheck **Active** and then click **Accept**.



5. The deactivated mapping no longer appears in the list:



Note that in the above example there is now an “AP Invoice Attachment” mapping in the **Associated** Mappings list.

The “AP Invoice Attachment” **Associated** mapping had previously been hidden by the **Attachment** mapping of the same name because they both had the same search criteria and Attachment mappings take precedence over Associated mappings.

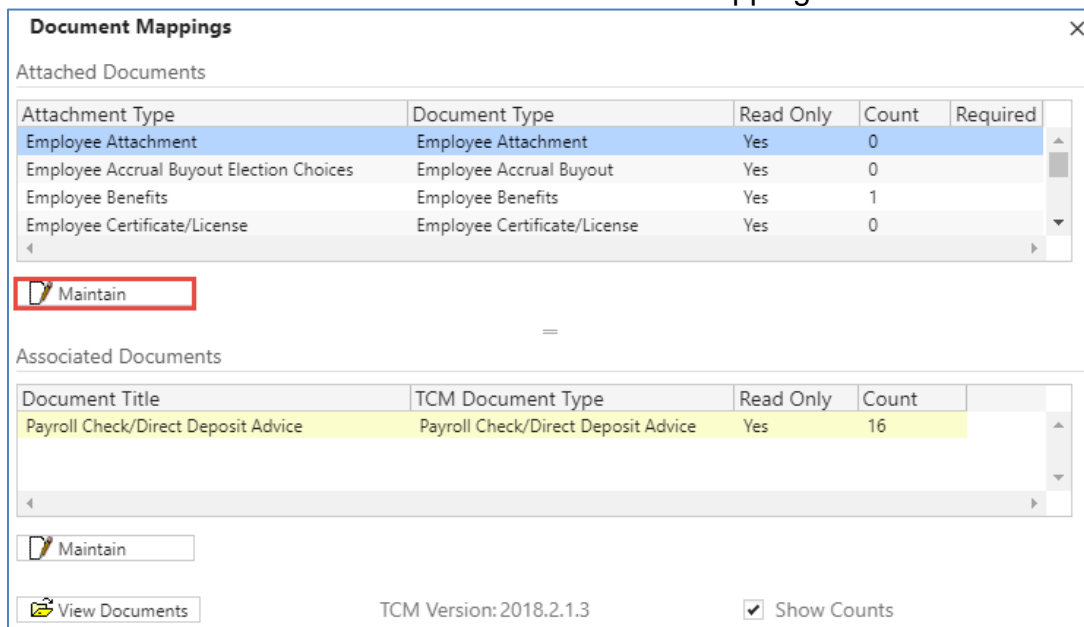
When the “AP Invoice Attachment” **Attachment** Mapping gets deactivated, Munis automatically restores the **Associated** Mapping so users can continue to view any TCM documents of that type. However, the “AP Invoice Attachments” will no longer appear in the count on the ribbon as that count is now coming from an Associated mapping.

## Creating Custom Attachment Mappings

Munis allows the creation of custom mappings from most screens. You can create both Attachment and Associated Mappings.

Below is an example of a custom Attachment mapping to the TCM 1095-B document from Munis Employee Inquiry. This mapping would be more appropriate as an Associated mapping but it works well as a demonstration.

1. While viewing an active Munis record, click the **Attach** icon in the Munis ribbon to bring up the Document Mappings screen.
2. Click the **Maintain** button under the Attachment mapping list.



**Document Mappings**

Attached Documents

Attachment Type	Document Type	Read Only	Count	Required
Employee Attachment	Employee Attachment	Yes	0	
Employee Accrual Buyout Election Choices	Employee Accrual Buyout	Yes	0	
Employee Benefits	Employee Benefits	Yes	1	
Employee Certificate/License	Employee Certificate/License	Yes	0	

Maintain

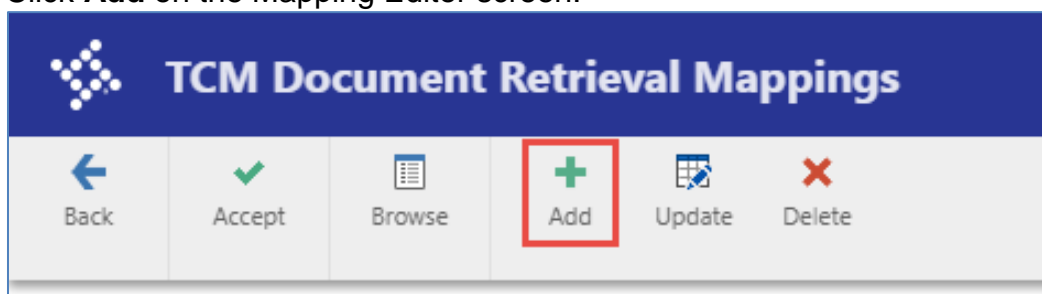
Associated Documents

Document Title	TCM Document Type	Read Only	Count
Payroll Check/Direct Deposit Advice	Payroll Check/Direct Deposit Advice	Yes	16

Maintain

View Documents TCM Version: 2018.2.1.3  Show Counts

3. Click **Add** on the Mapping Editor screen.



**TCM Document Retrieval Mappings**

Back Accept Browse **Add** Update Delete

Employee Attachment Types

 ?  C

Back Accept Cancel Search

Context/application: Employees

Type: Custom 1095-B

Caption: 1095-B

Description: Get 1095-B by Employee ID

Document Type: 1095-B x ...

Required  
 Active  
 Read Only  
 System type  
 Context Default

TCM Field Description	Munis Field	Use In Search	Searchable	Required
Attachment Filename	...	<input type="checkbox"/>		
Attachment Title	...	<input type="checkbox"/>	Yes	
Employee Number	...	<input type="checkbox"/>	Yes	Yes
First Name	...	<input type="checkbox"/>	Yes	
Last Name	...	<input type="checkbox"/>	Yes	
Location	...	<input type="checkbox"/>	Yes	
Record ID	...	<input type="checkbox"/>	Yes	Yes
SSN	...	<input type="checkbox"/>	Yes	
Sequence	...	<input type="checkbox"/>	Yes	Yes
Year	...	<input type="checkbox"/>	Yes	Yes

4. The **Context/application** box cannot be changed.
5. Enter the **Type** for your mapping. This will be used to ensure a unique entry in the Munis database, so it is recommended you include a unique pre-fix. I chose the word “Custom” but you could use an abbreviation for your site and then the Document Type you are mapping to. The Type is not displayed and is only visible to the mapping administrator.
6. Enter the **Caption** for your mapping. This will appear in the “Attachment Type” (mapping name) column when a user views the Munis Mapping screen.
7. Enter the **Description** for your mapping. This explains the purpose of the mapping and is only viewable by a mapping administrator.
8. Click the ... for **Document Type** to choose the TCM Document Type to map to.
9. Check the **Active** checkbox to ensure your mapping is visible on the Munis mapping screen.
10. Check the **Read Only** checkbox if you don’t intend the user to be able to add or modify an existing TCM document that matches the applicable to the Munis record.

## Notes about Mapping Fields:

Field Mappings are how you link Munis fields to TCM Metadata Fields. Once a field is mapped, TCM can use the data from the Munis Object to find matching Metadata in its records. TCM will also use this link to populate its metadata fields when creating new records.

### Read Only Mappings:

- You only need to map fields you intend to use as search criteria.
- The **Required** fields are generally the fields that will make each Munis record unique. For example, in a Requisition Attachment, the combination of **Fiscal Year** and **Requisition Number** should never have more than one match in Munis, as Requisition Numbers *could* be recycled each year, and obviously Fiscal Year would not be unique to just one requisition.
- Given the above information about required fields, it's usually a good idea to map required fields and use them in your search.

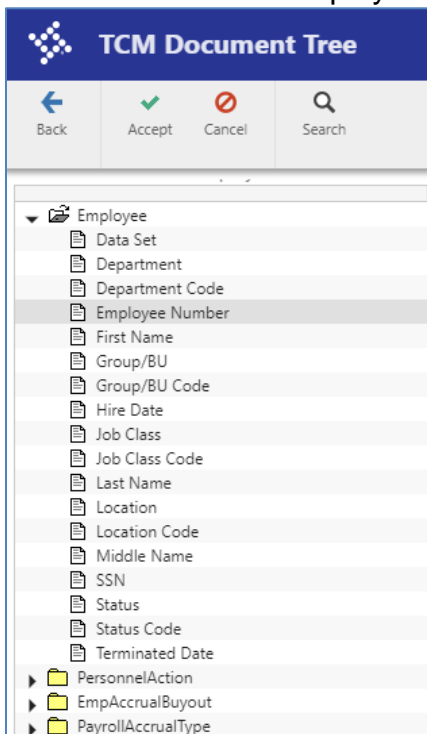
### Read-Write Mappings:

- You need to map fields you intend to use as search criteria.
- You need to map all fields you intend TCM to use as Metadata in new records.
- You **MUST** map all required fields!  
**TCM will not save new records if required data is missing!**

11. Decide which Munis fields need to be mapped to which TCM metadata fields. Note the Searchable column indicates which values you can search for in TCM. Note also the Required column indicates which values must be supplied to save the TCM record.

TCM Field Description	Munis Field	Use In Search	Searchable	Required
Attachment Filename	...	<input type="checkbox"/>		
Attachment Title	...	<input type="checkbox"/>	Yes	
Employee Number	...	<input type="checkbox"/>	Yes	Yes
First Name	...	<input type="checkbox"/>	Yes	
Last Name	...	<input type="checkbox"/>	Yes	
Location	...	<input type="checkbox"/>	Yes	
Record ID	...	<input type="checkbox"/>	Yes	Yes
SSN	...	<input type="checkbox"/>	Yes	
Sequence	...	<input type="checkbox"/>	Yes	Yes
Year	...	<input type="checkbox"/>	Yes	Yes

12. Click the  on the Employee Number row to open the Select Source screen.



13. The Select Source screen for Attachment mappings uses Munis Objects. Munis Objects are groups of information within Munis. For example, the Employee Object contains the employee's number, name, department and so on. Expand the Employee Object tree and double-click on the "Employee Number" field.

14. Once you have selected the Employee Number field, be sure to check the **Use In Search** checkbox to have the mapping use this field value when searching for records in TCM.

Context/application	Employees			
Type	Custom 1095-B			
Caption	1095-B			
Description	Get 1095-B by Employee ID			
Document Type	1095-B			

TCM Field Description	Munis Field	Use In Search	Searchable	Required
Attachment Filename	...	<input type="checkbox"/>		
Attachment Title	...	<input type="checkbox"/>	Yes	
Employee Number	Employee.EmployeeNumbe	<input checked="" type="checkbox"/>	Yes	Yes
First Name	...	<input type="checkbox"/>	Yes	
Last Name	...	<input type="checkbox"/>	Yes	
Location	...	<input type="checkbox"/>	Yes	
Record ID	...	<input type="checkbox"/>	Yes	Yes
SSN	...	<input type="checkbox"/>	Yes	
Sequence	...	<input type="checkbox"/>	Yes	Yes
Year	...	<input type="checkbox"/>	Yes	Yes

As this is a read-only mapping, and the Munis Employee Object doesn't contain a Fiscal Year value this is the only field we need to map. Realize though that this mapping will return the all 1095-B TCM records for the active employee regardless of year.

15. Now when you click the Attach paperclip icon in Munis you can see your mapping in the list:

**Document Mappings** ×

Attached Documents

Attachment Type	Document Type	Read Only	Count	Required
Employee Attachment	Employee Attachment	Yes	0	
1095-B	1095-B	Yes	1	
Employee Accrual Buyout Election Choices	Employee Accrual Buyout	Yes	0	

.....

Associated Documents

Document Title	TCM Document Type	Read Only	Count
Payroll Check/Direct Deposit Advice	Payroll Check/Direct Deposit Advice	Yes	16

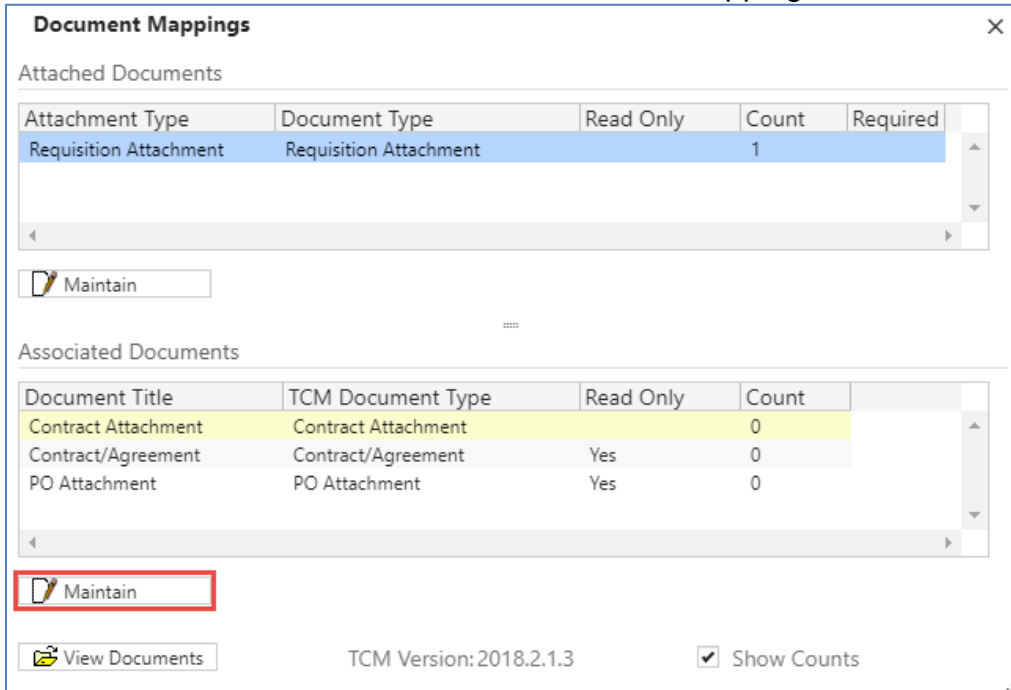
TCM Version: 2018.2.1.3  Show Counts

## Creating Custom Associated Mappings

Munis allows the creation of custom mappings from most screens. You can create both Attachment and Associated Mappings.

Below is an example of a custom Associated mapping to TCM Vendor Attachments from the Requisition Entry Munis screen.

1. While viewing an active Munis record, click the **Attach** icon in the Munis ribbon to open the Document Mappings screen.
2. Click the **Maintain** button under the Associated mapping list.



**Document Mappings**

Attached Documents

Attachment Type	Document Type	Read Only	Count	Required
Requisition Attachment	Requisition Attachment		1	

Maintain

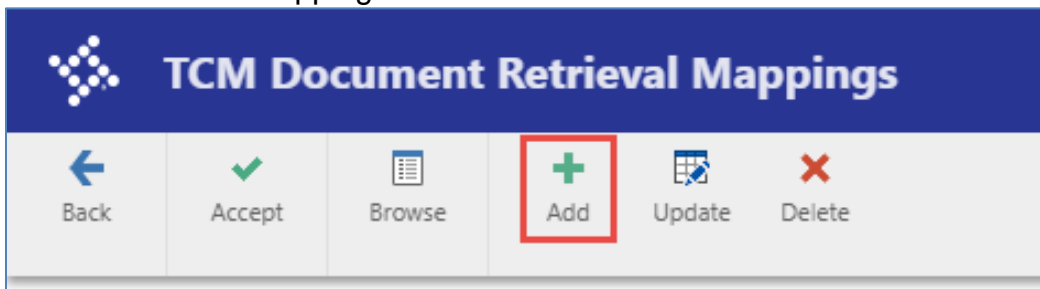
Associated Documents

Document Title	TCM Document Type	Read Only	Count
Contract Attachment	Contract Attachment		0
Contract/Agreement	Contract/Agreement	Yes	0
PO Attachment	PO Attachment	Yes	0

Maintain

View Documents TCM Version: 2018.2.1.3 Show Counts

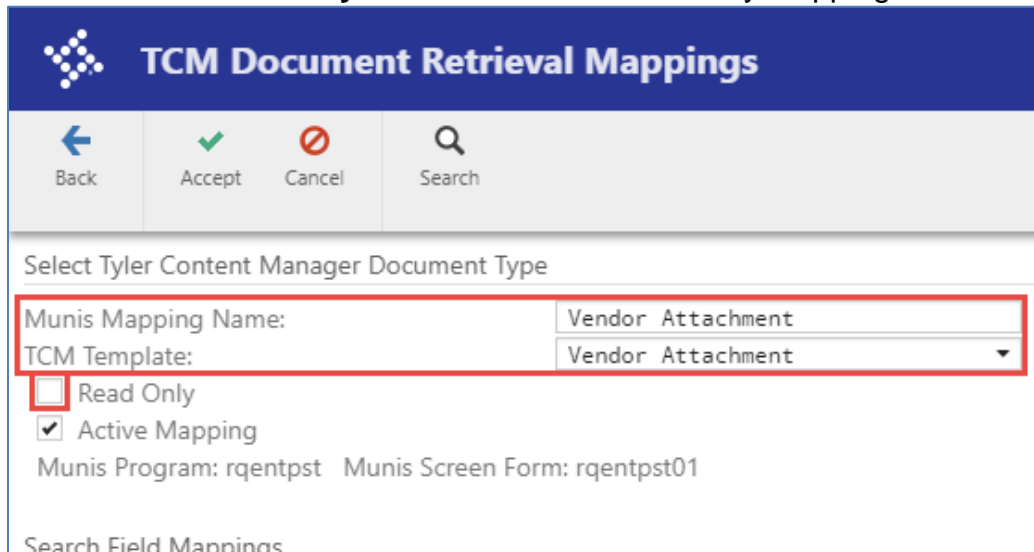
3. Click **Add** on the Mapping Editor screen.



**TCM Document Retrieval Mappings**

Back Accept Browse **Add** Update Delete

4. Enter a name for your mapping in the Munis Mapping Name box. Select the Document Type from the TCM Template pull-down list. And uncheck **Read Only** if this will not be a read only mapping.



**TCM Document Retrieval Mappings**

Back Accept Cancel Search

Select Tyler Content Manager Document Type

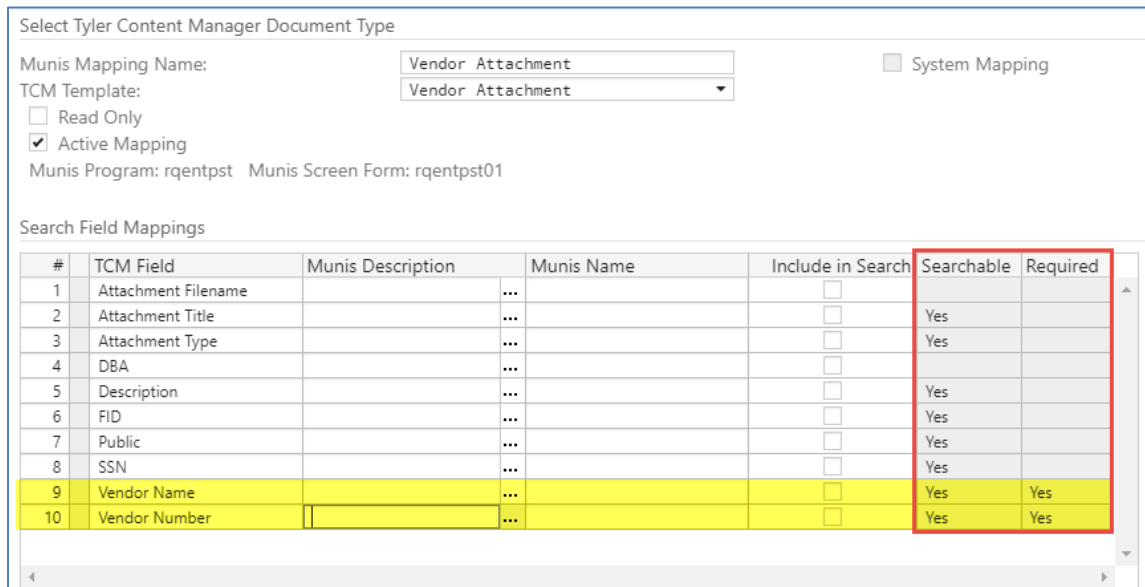
Munis Mapping Name: Vendor Attachment  
 TCM Template: Vendor Attachment

Read Only  
 Active Mapping

Munis Program: rqentpst Munis Screen Form: rqentpst01

Search Field Mappings

5. Decide which Munis fields need to be mapped to which TCM metadata fields. Note the Searchable column indicates which values you can search for in TCM. Note also the Required column indicates which values must be supplied to save the TCM record.



Select Tyler Content Manager Document Type

Munis Mapping Name: Vendor Attachment System Mapping  
 TCM Template: Vendor Attachment

Read Only  
 Active Mapping

Munis Program: rqentpst Munis Screen Form: rqentpst01

Search Field Mappings

#	TCM Field	Munis Description	Munis Name	Include in Search	Searchable	Required
1	Attachment Filename	...		<input type="checkbox"/>		
2	Attachment Title	...		<input type="checkbox"/>	Yes	
3	Attachment Type	...		<input type="checkbox"/>	Yes	
4	DBA	...		<input type="checkbox"/>		
5	Description	...		<input type="checkbox"/>	Yes	
6	FID	...		<input type="checkbox"/>	Yes	
7	Public	...		<input type="checkbox"/>	Yes	
8	SSN	...		<input type="checkbox"/>	Yes	
9	Vendor Name	...		<input type="checkbox"/>	Yes	Yes
10	Vendor Number	...		<input type="checkbox"/>	Yes	Yes

First we'll map Vendor Number, as this is the only field we will need to find a unique Vendor Attachment.

6. Click the  on the Vendor Number row to open the Select Source screen.

- The Select Source screen for Associated attachments uses screen-scraping. Therefore you will see the top tree menu is **Munis Screen Form** and each lower branch is a different sub-section of the screen. The Vendor Number is reasonably found under **Vendor Information**, though the field Name is “Suggested Vendor”. NOTE: field names listed here are from the code that generates the screen, and some are non-obvious, requiring you to look in the Value column for the expected information.

Select source for

Vendor Attachment->Vendor Number

Name	Value
▼ Munis Screen Form	SCREEN_FORM
▶ Main Information	
▼ Vendor Information	
Suggested Vendor	1010
Suggested Vendor Name	DELL
Vendor Address	0
formonly.pomail_name	
formonly.vendor_addr1_1	ONE DELL WAY
formonly.vendor_addr2_1	
formonly.vendor_addr3_1	
formonly.vendor_addr4_1	
formonly.vendor_city_1	ROUND ROCK
formonly.vendor_state_1	TX
formonly.vendor_zip_1	78682
Vendor Remit	1
formonly.remit_name	DELL
▶ Shipping Information	
▶ Terms	
▶ Miscellaneous	
▶ Contract	

- Once you have selected the field, you will return to the Mapping screen. Ensure at least one field has a checkmark in the **Include in Search** column. In this case only Vendor Number will be used in the TCM search.

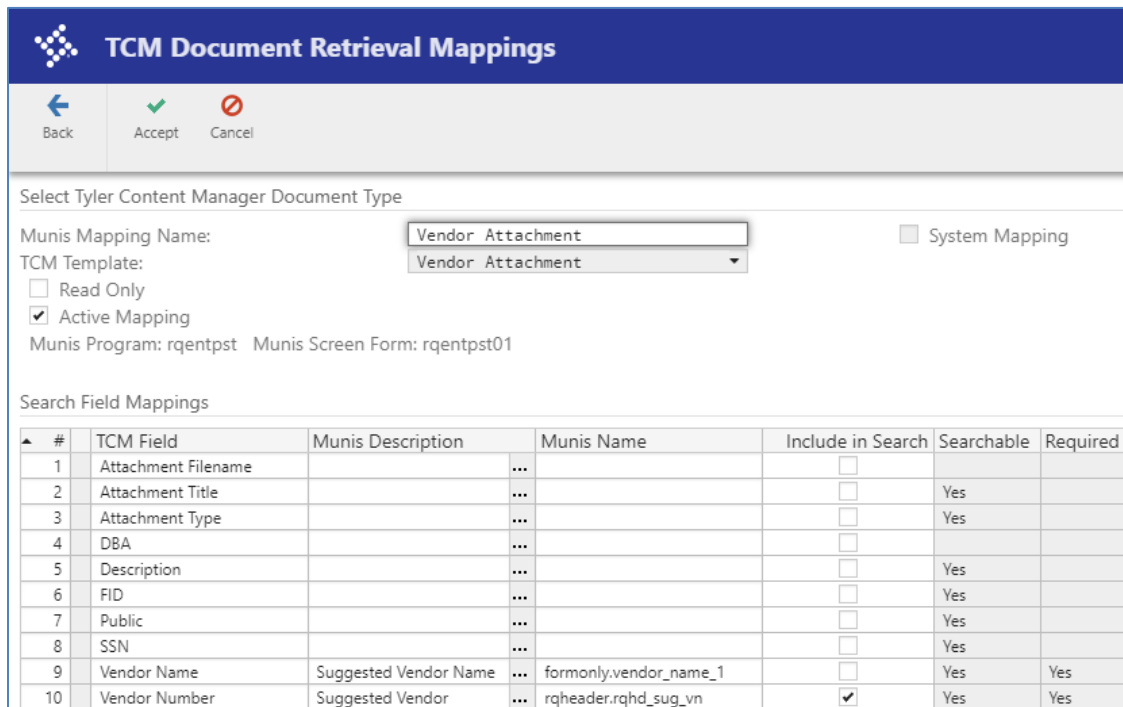
#	TCM Field	Munis Description	Munis Name	Include in Search	Se
9	Vendor Name			<input type="checkbox"/>	Ye
10	Vendor Number	Suggested Vendor	rqheader.rqhd_sug_vn	<input checked="" type="checkbox"/>	Ye

NOTE: Keep in mind that custom mappings are not verified by Munis. If you were to search on only the vendor’s state, the mapping would return **all** vendors from the current vendor’s state!

Likewise, if you were to map Munis’s vendor’s ZIP Code to TCM’s vendor’s number the search would return only the vendor whose number matched the current vendor’s ZIP Code (if there were such a vendor).

9. Repeat the above steps to map Vendor Name as it is also a required TCM field.

10. The result should look like this:



**TCM Document Retrieval Mappings**

Select Tyler Content Manager Document Type

Munis Mapping Name:   System Mapping

TCM Template:

Read Only  
 Active Mapping

Munis Program: rqentpst Munis Screen Form: rqentpst01

Search Field Mappings

#	TCM Field	Munis Description	Munis Name	Include in Search	Searchable	Required
1	Attachment Filename	...		<input type="checkbox"/>		
2	Attachment Title	...		<input type="checkbox"/>	Yes	
3	Attachment Type	...		<input type="checkbox"/>	Yes	
4	DBA	...		<input type="checkbox"/>		
5	Description	...		<input type="checkbox"/>	Yes	
6	FID	...		<input type="checkbox"/>	Yes	
7	Public	...		<input type="checkbox"/>	Yes	
8	SSN	...		<input type="checkbox"/>	Yes	
9	Vendor Name	Suggested Vendor Name	formonly.vendor_name_1	<input type="checkbox"/>	Yes	Yes
10	Vendor Number	Suggested Vendor	rqheader.rqhd_sug_vn	<input checked="" type="checkbox"/>	Yes	Yes

11. If you were to create a new document in TCM using this mapping, only the vendor's number and name are pre-populated.



**Document Information**

Attachment Filename

Attachment Title

VendorA... At

Description

Public

**Vendor Number**  
1010

**Vendor Name**  
DELL

DBA

NOTE: if I had *not* mapped Vendor Name, the user would be required to input it manually prior to saving the TCM record.

# Saved Reports

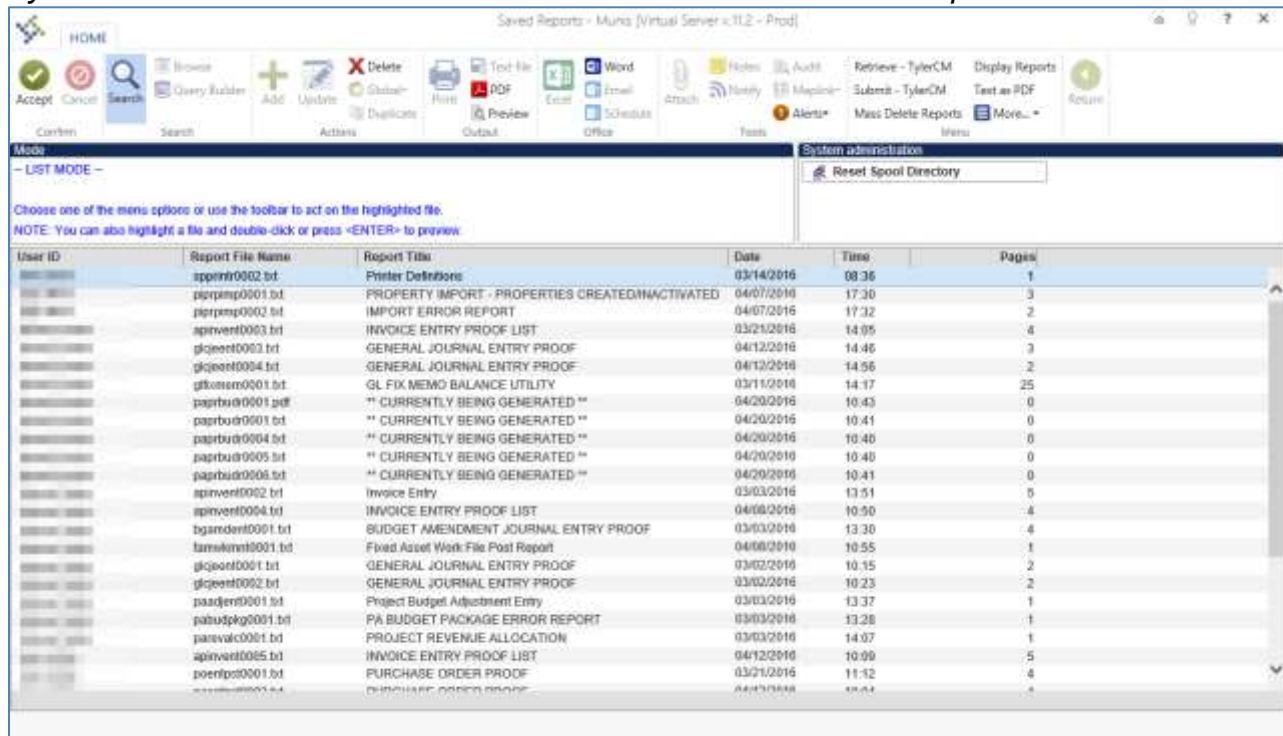
Munis provides the ability to save output from any program in the form of a saved report. These are retrievable at any time from the Munis Saved Reports program. Additionally, these reports can be archived into TCM for long-term storage. This is typically utilized to archive or backup critical reports.

## Archiving Saved Reports

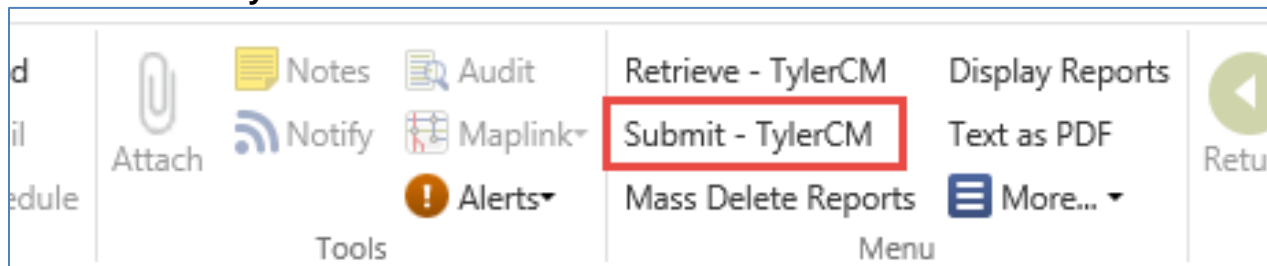
To archive reports from the Saved Reports programs to TCM:

1. Open the **Saved Reports** from the Munis menu.

*System Administration > Printer/Device Administration > Saved Reports*



2. Click **Submit – TylerCM**.



The program refreshes to Submit mode.

X	User ID	Report File Name	Report Title	Date	Time	Pages
<input checked="" type="checkbox"/>	dan.cloze	spprint0002.td	Printer Deletions	03/14/2016	08:36	1
<input type="checkbox"/>	gkjl.elliott	pjprinp0001.td	PROPERTY IMPORT - PROPERTIES CREATED(INACTIVATED)	04/07/2016	17:30	3
<input type="checkbox"/>	gkjl.elliott	pjprinp0002.td	IMPORT ERROR REPORT	04/07/2016	17:32	2
<input type="checkbox"/>	jeremy.porter	aprintent0003.td	INVOICE ENTRY PROOF LIST	03/01/2016	14:05	4
<input type="checkbox"/>	jeremy.porter	gljeent0003.td	GENERAL JOURNAL ENTRY PROOF	04/12/2016	14:46	3
<input type="checkbox"/>	jeremy.porter	gljeent0004.td	GENERAL JOURNAL ENTRY PROOF	04/12/2016	14:56	2
<input type="checkbox"/>	jeremy.porter	glfixmem0001.td	GL FIX MEMO BALANCE UTILITY	03/11/2016	14:17	25
<input type="checkbox"/>	jeremy.porter	paprbud0001.pdf	** CURRENTLY BEING GENERATED **	04/20/2016	10:43	0
<input type="checkbox"/>	jeremy.porter	paprbud0001.td	** CURRENTLY BEING GENERATED **	04/20/2016	10:41	0
<input type="checkbox"/>	jeremy.porter	paprbud0004.td	** CURRENTLY BEING GENERATED **	04/20/2016	10:40	0
<input type="checkbox"/>	jeremy.porter	paprbud0005.td	** CURRENTLY BEING GENERATED **	04/20/2016	10:40	0
<input type="checkbox"/>	jeremy.porter	paprbud0006.td	** CURRENTLY BEING GENERATED **	04/20/2016	10:41	0
<input type="checkbox"/>	lindsey.fulton	aprintent0002.td	Invoice Entry	03/03/2016	13:51	5
<input type="checkbox"/>	lindsey.fulton	aprintent0004.td	INVOICE ENTRY PROOF LIST	04/06/2016	10:50	4
<input type="checkbox"/>	lindsey.fulton	bgandent0001.td	BUDGET AMENDMENT JOURNAL ENTRY PROOF	03/03/2016	13:30	4
<input type="checkbox"/>	lindsey.fulton	famwkint0001.td	Fixed Asset Work File Post Report	04/06/2016	10:55	1
<input type="checkbox"/>	lindsey.fulton	gljeent0001.td	GENERAL JOURNAL ENTRY PROOF	03/02/2016	10:15	2
<input type="checkbox"/>	lindsey.fulton	gljeent0002.td	GENERAL JOURNAL ENTRY PROOF	03/02/2016	10:23	2
<input type="checkbox"/>	lindsey.fulton	paadent0001.td	Project Budget Adjustment Entry	03/03/2016	13:37	1
<input type="checkbox"/>	lindsey.fulton	patudekg0001.td	PA BUDGET PACKAGE ERROR REPORT	03/03/2016	13:28	1
<input type="checkbox"/>	lindsey.fulton	parwatc0001.td	PROJECT REVENUE ALLOCATION	03/03/2016	14:07	1

- To archive individual documents, select the **X** check box for each file to archive. Use the **Select All** button on the Munis ribbon to select all documents at one time.
- Click **Accept** on the Munis ribbon.  
The program displays a confirmation message.

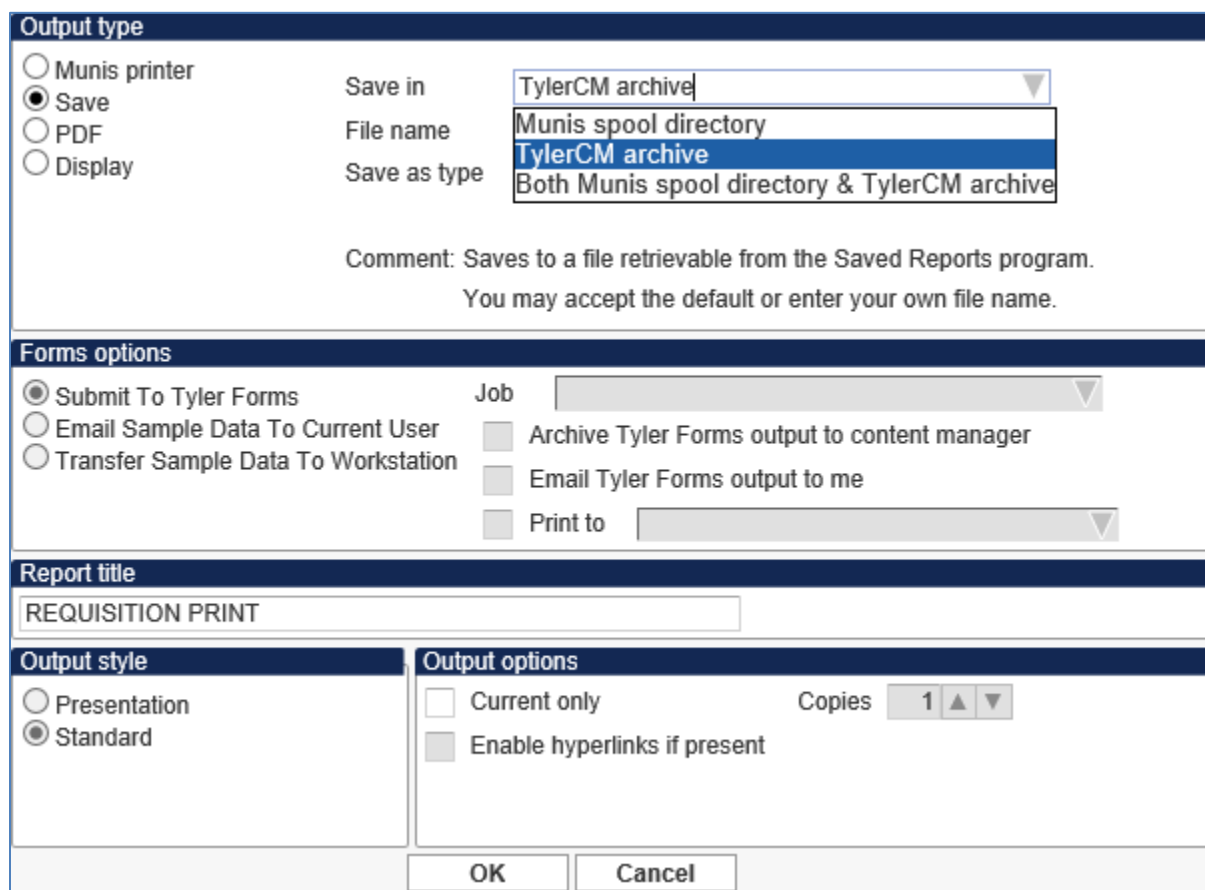
- Click **Yes** to delete the submitted reports from Munis or click **No** to have the report exist in both Munis and TCM.

## Archiving Munis Reports Directly

Munis reports can also be archived directly to TCM from the Output prompt when you are generating a report.

To archive reports directly to TCM:

1. From any Munis program that generates reports, click **Print** on the Munis ribbon to display the **Output** dialog box.



**Output type**

Munis printer  
 Save  
 PDF  
 Display

Save in: TylerCM archive  
 File name: Munis spool directory  
 Save as type: TylerCM archive  
 Both Munis spool directory & TylerCM archive

Comment: Saves to a file retrievable from the Saved Reports program.  
You may accept the default or enter your own file name.

**Forms options**

Submit To Tyler Forms  
 Email Sample Data To Current User  
 Transfer Sample Data To Workstation

Job: [dropdown]  
 Archive Tyler Forms output to content manager  
 Email Tyler Forms output to me  
 Print to: [dropdown]

**Report title**

REQUISITION PRINT

**Output style**

Presentation  
 Standard

**Output options**

Current only  
 Enable hyperlinks if present

Copies: 1 [up] [down]

OK Cancel

2. Select the **Save** option.
3. From the **Save In** list, select **TylerCM Archive** to save the file only to TCM; to archive the file directly to TCM and to send it to the Munis Saved Reports program, select **Both Munis Spool Directory and TylerCM Archive**.
4. Click **OK**.

## Retrieving Archived Munis Reports

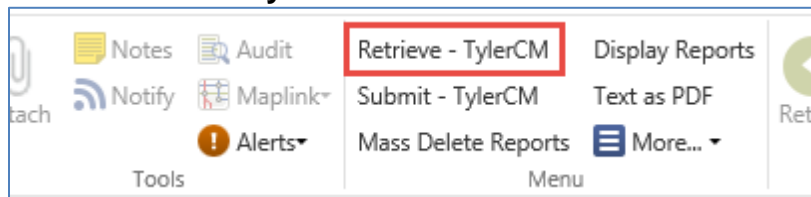
To retrieve reports archived using the Saved Reports program:

1. Open the **Saved Reports** from the Munis menu.

*System Administration > Printer/Device Administration > Saved Reports*

User ID	Report File Name	Report Title	Date	Time	Pages
...	pprint0002.txt	Printer Definitions	03/14/2016	08:36	1
...	pierpmp0001.txt	PROPERTY IMPORT - PROPERTIES CREATED/INACTIVATED	04/07/2016	17:30	3
...	pierpmp0002.txt	IMPORT ERROR REPORT	04/07/2016	17:32	2
...	spirvent0003.txt	INVOICE ENTRY PROOF LIST	03/21/2016	14:05	4
...	gljeent0003.txt	GENERAL JOURNAL ENTRY PROOF	04/12/2016	14:46	3
...	gljeent0004.txt	GENERAL JOURNAL ENTRY PROOF	04/12/2016	14:56	2
...	glfixems0001.txt	GL FIX MEMO BALANCE UTILITY	03/11/2016	14:17	25
...	paprbud0001.pdf	** CURRENTLY BEING GENERATED **	04/20/2016	10:43	0
...	paprbud0001.txt	** CURRENTLY BEING GENERATED **	04/20/2016	10:41	0
...	paprbud0004.txt	** CURRENTLY BEING GENERATED **	04/20/2016	10:40	0
...	paprbud0005.txt	** CURRENTLY BEING GENERATED **	04/20/2016	10:40	0
...	paprbud0006.txt	** CURRENTLY BEING GENERATED **	04/20/2016	10:41	0
...	spirvent0002.txt	Invoice Entry	03/03/2016	13:51	5
...	spirvent0004.txt	INVOICE ENTRY PROOF LIST	04/08/2016	10:50	4
...	bgamden0001.txt	BUDGET AMENDMENT JOURNAL ENTRY PROOF	03/03/2016	13:30	4
...	fxamkmm0001.txt	Fixed Asset Work File Post Report	04/08/2016	10:55	1
...	gljeent0001.txt	GENERAL JOURNAL ENTRY PROOF	03/02/2016	10:15	2
...	gljeent0002.txt	GENERAL JOURNAL ENTRY PROOF	03/02/2016	10:23	2
...	paadjent0001.txt	Project Budget Adjustment Entry	03/03/2016	13:37	1
...	paadjpk0001.txt	PA BUDGET PACKAGE ERROR REPORT	03/03/2016	13:28	1
...	panevalc0001.txt	PROJECT REVENUE ALLOCATION	03/03/2016	14:07	1
...	spirvent0005.txt	INVOICE ENTRY PROOF LIST	04/12/2016	10:09	5
...	poentpr0001.txt	PURCHASE ORDER PROOF	03/21/2016	11:52	4
...	...	...	...	...	...

2. Click **Retrieve – TylerCM**.



The program displays the Retrieve fields.

Search criteria	Search hints
User ID <input type="text" value="munis"/> <span>x</span> Report file name <input type="text"/> Report title <input type="text"/> Date or range <input type="text"/> to <input type="text"/> Time <input type="text"/> Pages or range <input type="text"/> to <input type="text"/> Full text search <input type="text"/>	- Use quotation marks (" ") for phrases - Use one date field for individual dates - Use both date fields to search for date ranges <b>TylerCM ONLY</b> - Use trailing * (i.e. poprints* ) for a wildcard character - Use 'OR' to search for multiple values  <b>NOTE:</b> This search screen does not use Munis search syntax. Use Tyler Content Manager or Laserfiche specific syntax instead when searching for a report.

3. Complete the selection parameters for the documents to retrieve and click **Accept**.  
The program opens TCM and provides a list of documents matching the selection criteria.

# Additional Capabilities

## Annotating Documents

Content captured in TCM as images can be annotated or marked-up using the tools available within TCM.





To annotate files:

1. Open the Munis program and navigate to the record for which to annotate a TCM attachment.
2. Click **TCM** on the Munis ribbon.
3. In TCM, select the applicable button in the Annotations group on the toolbar.



### Annotations Group


*NOTE: Annotations apply to image files (for example, .tiff, .jpg, .bmp, and so on).*

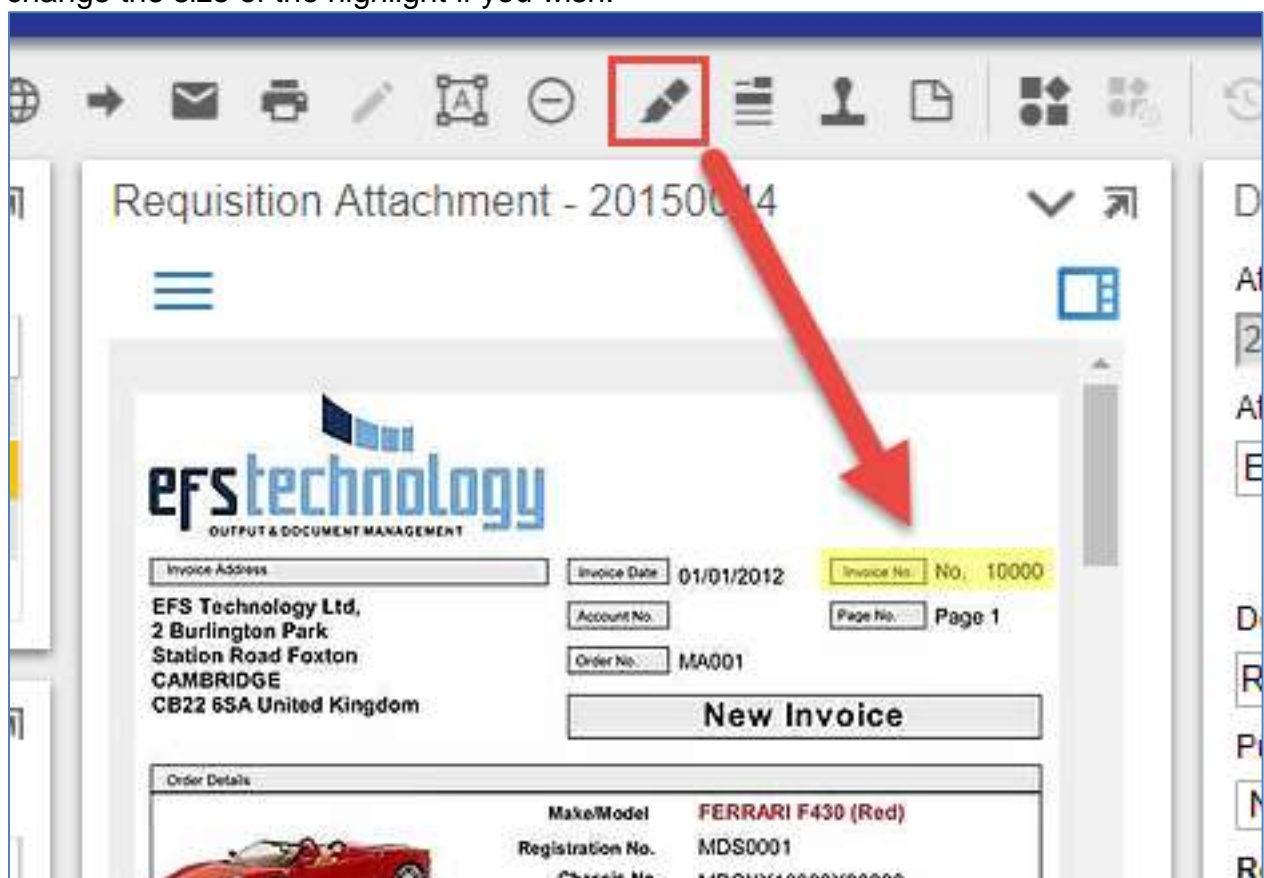
	<p>Highlight: Highlights an area on the file attachment.</p>
	<p>Redaction: Redacts an area on the file attachment. This feature requires administrative permissions.</p>
	<p>Stamp: Places a text stamp on the file attachment.</p>
	<p>Sticky Note: Places a sticky note on the file attachment.</p>

## Highlight

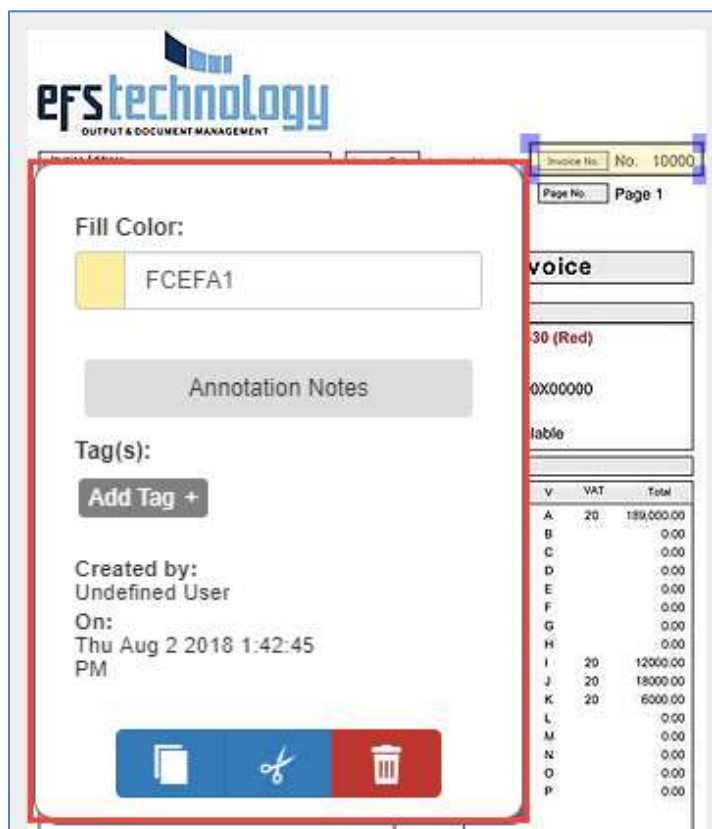
Highlighting provides the ability to emphasize an area of an image. These highlights do *not* appear on the image if the image is printed.

To highlight text:

1. Click the  icon on the ribbon.
2. Click your mouse pointer at one corner of the area at which to position the highlight.  
Holding your mouse button, drag the mouse pointer to create a highlight box.  
When you release the mouse button, the program displays corner anchors for you to change the size of the highlight if you wish.



3. Right-clicking on the highlight will bring up the Highlight Options dialog.



From here you can:

- Change the color of the highlight
- Add notes about this annotation (viewable only from this right-click menu).
- Add Tags to this annotation.
- View audit information about the user and date/time the annotation was created.
- Copy, Cut, or Delete this annotation.


4. Click **Save** before exiting and returning to the Munis program from which you started.

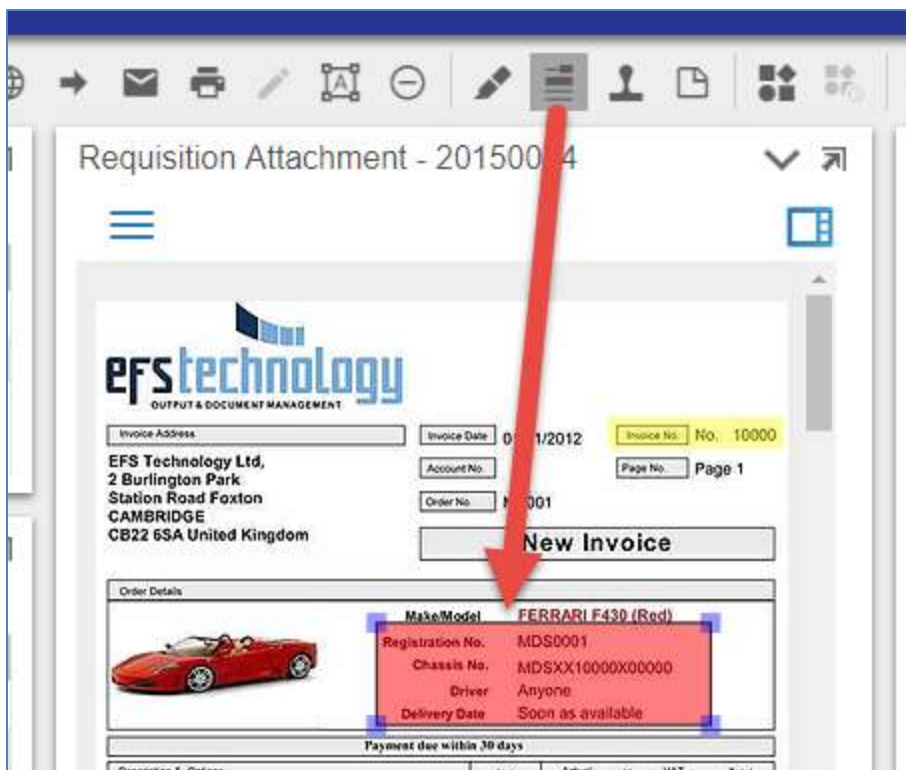
## Redaction

Redaction covers areas of an image and prevents those areas being viewed by users who do not have the appropriate permissions.

Redaction requires administrative (A) privileges to the doc type both to add/edit redactions as well as making them transparent. If you do not have the appropriate permissions, the Redaction icon is not accessible and existing redactions appear as solid blocks.

To complete redaction:

1. Click the  icon on the ribbon.
2. On the image, click your mouse pointer at one corner of the area to redact and then, pressing your mouse button, drag your mouse pointer to create a redaction box.



When you release the mouse button, the redaction box displays.

3. Unlike highlights, the redaction icon stays active after creating a redaction, allowing you to create multiple redactions without having to re-click the icon.
4. Click **Save** on the toolbar before exiting and returning to the Munis program from which you started.

- Users without Administrative (A) permissions for this document type cannot see the redacted portion of the image.



**efst** technology  
OUTPUT & DOCUMENT MANAGEMENT

Invoice Address: **EFS Technology Ltd,  
2 Burlington Park  
Station Road Foxton  
CAMBRIDGE  
CB22 6SA United Kingdom**

Invoice Date: 01/01/2012  
Account No.:  
Order No.: MA001

Invoice No. No. 10000  
Page No. Page 1

**New Invoice**

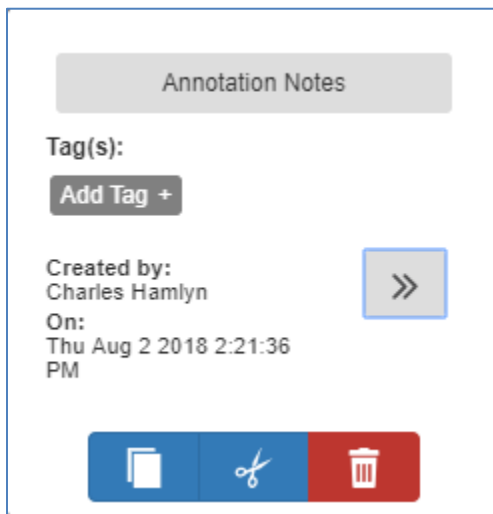
Order Details

Make/Model **FERRARI F430 (Red)**

Payment due within 30 days

Description & Options	Qty	Actual	UAT	Total
-----------------------	-----	--------	-----	-------

- Right-clicking on the redaction will bring up the Redaction Options dialog.



Annotation Notes

Tag(s):  
Add Tag +

Created by: Charles Hamlyn >>  
On: Thu Aug 2 2018 2:21:36 PM

Copy Cut Delete

From here you can:

- Add notes about this annotation (viewable only from this right-click menu).
- Add Tags to this annotation.
- View audit information about the user and date/time the annotation was created.
- Copy, Cut, or Delete this annotation.



- Click into the image (off the dialog) to hide the **Edit Text** dialog. You will see the text stamp on the image:



- Right-clicking on the stamp will bring up the Text Stamp Options dialog.

**Edit Text**

Approved

**Font Color:**

**Font:**  
 Arial

**Font Size:**  
 14

**Bold**    *Italic*

Annotation Notes

**Tag(s):**

**Created by:**  
 Undefined User  
**On:**  
 Thu Aug 2 2018 2:26:09 PM

From here you can:


- Edit the text of the annotation.
- Change the font color of the annotation.
- Change the font style of the annotation.
- Change the font size of the annotation.
- Apply bold and italics to the annotation.
- Add notes about this annotation (viewable only from this right-click menu).
- Add Tags to this annotation.
- View audit information about the user and date/time the annotation was created.
- Copy, Cut, or Delete this annotation.

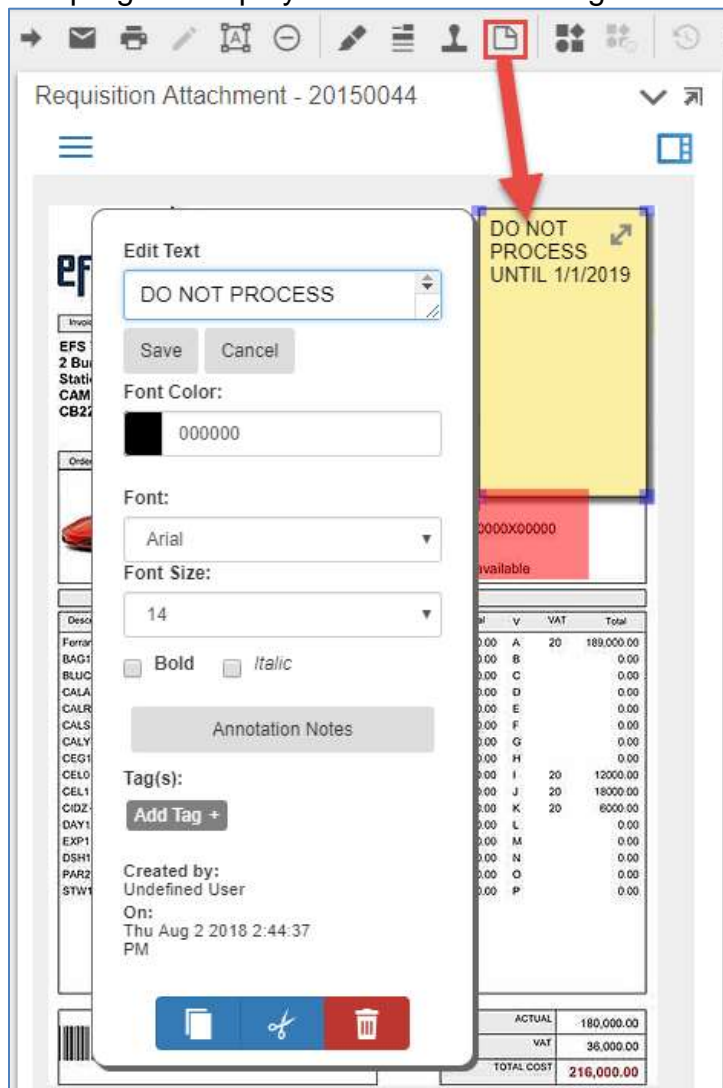
- Click **Save** before exiting and returning to the Munis program from which you started.

## Sticky Notes

Sticky notes provide the ability to add a note to an image. These notes do *not* appear on the image if the image is printed.

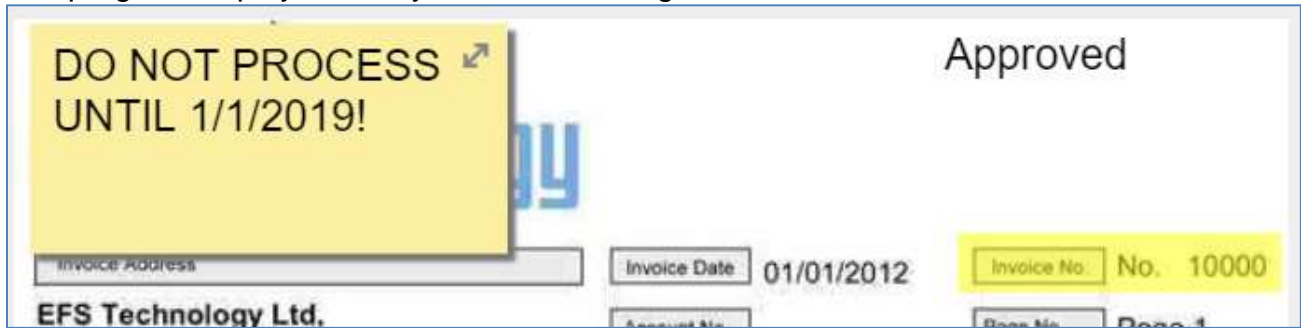
To add a sticky note:

1. Click the  icon on the ribbon.
2. Using your mouse, click the image area where you are adding the sticky note. The program displays the **Edit Text** dialog box.



3. Enter the text for the note and click **Save**.
4. Click on the image (off of the dialog) to close the **Edit Text** dialog.

5. The program displays a sticky note on the image.

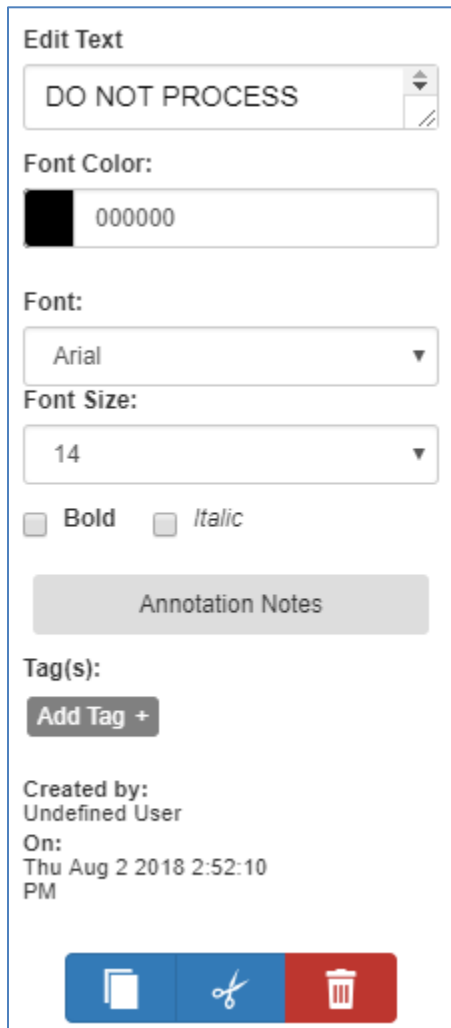


6. Clicking the double-arrow minimizes the note into a small yellow square.



7. The sticky note can be clicked and dragged at either full size or minimized.

8. Right-clicking on the sticky note will bring up the Sticky Note Options dialog.



From here you can:

- Edit the text of the annotation.
- Change the font color of the annotation.
- Change the font style of the annotation.
- Change the font size of the annotation.
- Apply bold and italics to the annotation.
- Add notes about this annotation (viewable only from this right-click menu).
- Add Tags to this annotation.
- View audit information about the user and date/time the annotation was created.
- Copy, Cut, or Delete this annotation.

9. Click **Save** before exiting and returning to the Munis program from which you started.

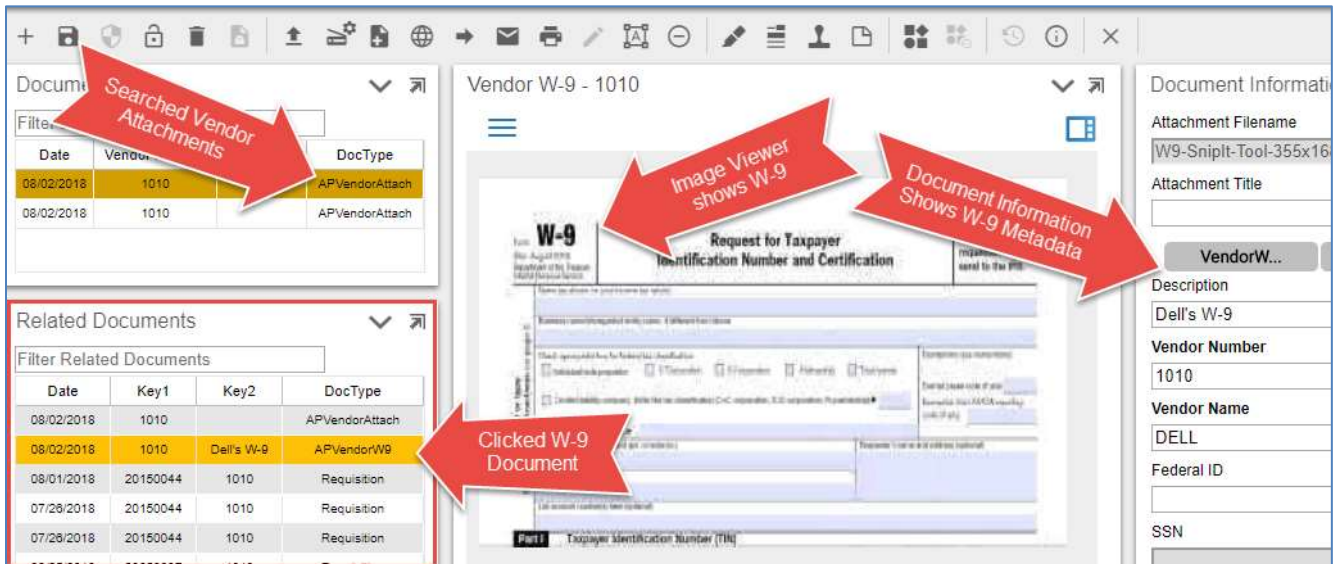
## Related Documents

The standard document types available within TCM are preconfigured to look for related documents throughout the system.

Specific fields on document types are configured to look at related fields on other document types for identical values.

An example of this is the Vendor Number field that exists on the Vendor Attachment (APVendorAttach) document type and the Vendor W-9 (APVendorW9) document type.

When you search for a Vendor Attachment, TCM automatically provides a list of documents related to that Vendor.



The screenshot displays the TCM interface with several components:

- Document Search Results:** A table showing search results for Vendor Attachments.
 

Date	Vendor	DocType
08/02/2018	1010	APVendorAttach
08/02/2018	1010	APVendorAttach
- Related Documents:** A table showing a list of related documents.
 

Date	Key1	Key2	DocType
08/02/2018	1010		APVendorAttach
08/02/2018	1010	Dell's W-9	APVendorW9
08/01/2018	20150044	1010	Requisition
07/28/2018	20150044	1010	Requisition
07/28/2018	20150044	1010	Requisition
- Document Viewer:** A preview of a selected W-9 document titled "Request for Taxpayer Identification Number and Certification".
- Document Information Panel:** A sidebar on the right showing metadata for the selected document, including Attachment Filename, Attachment Title, Vendor Number (1010), and Vendor Name (DELL).

To view or retrieve related documents:

1. In Munis, navigate to the Munis record for which to retrieve a file.
2. Click **Attach** on the Munis ribbon and choose the appropriate mapping. When TCM opens, if there are any related documents it displays a list of related documents in the Related Documents group.
3. Simply click on a record in the related documents group to display that document instead of the original one you searched on.

## Dynamsoft Web TWAIN Scanning Driver

To grant the TCM HTML Viewer access to scanning functionality, you must install the Dynamsoft Web TWAIN driver. Provided the current website is in the Trusted Sites list, the browser will then be allowed to request an image from the scanner installed on the PC.

