

Tyler Content Manager Standard Edition

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Your time is a precious commodity. You need to evaluate complex options, determine their benefits, and manage multi-faceted transactions — several times a day. Your information needs to be quickly accessible and concise.

That’s why we’ve created a series of 15-minute guides, to outline the essential components of our systems. Each guide will focus on specific functionality, explain their importance and the realized benefits, outline any prerequisites you should have, and suggest optimal deployment steps.

In this guide:

You will be introduced to Tyler Content Manager Standard Edition (TCM SE) as it pertains to Tyler’s Munis® Financial Management Solution (Munis version 6.5 or greater).

In the fifteen minutes it takes to read this guide, you’ll learn how you can automate your processes and bring new value to your organization’s operations. At Tyler, we understand the value of your time — and of a product that ensures your time is well spent.

A Brief Description

Local government agencies are expected to continually enhance their operational efficiency. Today, government at all levels is expected to deliver on their designated missions, but with the challenges of fewer resources, reduced operational costs, and having to make information more readily accessible to employees, the public, and/or other governmental bodies. What’s more, all types of paper forms and documents continue to arrive from citizens, employees, and vendors, the managing of which is a costly, time-consuming, and error-prone manual process that has been impossible to eliminate — until now.

Tyler understands the challenges you face and has the experience and knowledge to help. That’s why we developed Tyler Content Manager Standard Edition (TCM SE) — an easy-to-deploy content management solution designed specifically for Munis clients of every size. Through the easy capture, storage, and retrieval of documents, it’s the perfect starting point for clients interested in electronically managing and seamlessly incorporating paper documents into Munis processes.



What does TCM SE do?

What if you could electronically capture all of your inbound documents and make them easily accessible by relaying them directly to your Munis applications? TCM SE is a complete document management solution that brings together best practices in Munis with inbound and outbound (TylerForms) communication. Increase your organization's efficiency by easily transforming your valuable paper forms and documents into electronic images that drive your key business processes in Munis. And streamline your business processes even further by making these documents accessible to all of your users right from your Munis applications. With TCM SE, users can scan incoming documents, as well as create, index, manage, secure, store, distribute, search, view, annotate, print, e-mail, and more all of your Munis-related documents.

Why is it called Standard Edition?

Getting the right documents into the hands of team members, suppliers, and citizens has never been easier. TCM SE is powered by Tyler's full-featured Enterprise Edition and is designed specifically for use with our Munis applications. Munis automates thousands of transactions, but does not maintain and organize the associated transaction documents. With TCM SE you can link and reconcile all related documents with the business transactions stored in Munis and make them available to your Munis users. What's more, any document can be sent via e-mail or printed and mailed based on your requirements. The result: effective control over paperwork processes.

Ask yourself these questions:

- How many people use filing cabinets each day?
- How long does it take to file or retrieve documents in each department?
- How many pieces of paper are generated by your organization each year?

According to Gartner Group, Delphi, and other pundit estimates, the amount of time wasted by an average worker on document-related, non-value-added tasks is currently 30% daily. When combined with the industry standards for the actual costs associated with paper-based processes, it's evident how much time and money you can save by automating with a content management solution. According to Gartner ("Document Management: Assessing Costs and Benefits," Sept. 27, 2000):

- The average document is physically or electronically copied nine to 11 times at a cost of about \$18.

- Documents cost approximately \$20 to file.
- Retrieving a misfiled document costs approximately \$120.

What's more, soft costs such as on-site or off-site storage, physical plant considerations, and postal and distribution costs, are significant to the bottom line.

We all know that paper is a physical burden. At some point, the sheer volume of it necessitates streamlining your process and the amount of required paperwork. Why not start today with TCM SE?

Like any worthwhile project, the business benefits come from organizational change. Similarly, your content management project can be justified in terms of "hard" benefits, which are typically more easily quantified, and "soft" benefits, which may be more qualitative, but are just as important.

Realized Benefits

TCM SE delivers the broadest set of content management functionality in one integrated platform, all delivered as a specifically-designed solution for your Munis users' needs.

- Automated imaging, indexing, and storing of documents, 16 TylerForms, and Munis system-generated reports.
- Efficient retrieval of documents directly from Munis inquiry screens.
- Paperless reports — e-mail or print when needed.
- Reduced printing/paper costs.
- Higher employee productivity and increased efficiency with collaboration.
- Reduced filing and storage space.
- Fewer lost or misplaced documents.
- Single point of access — Munis.
- Search and retrieval for power users.
- Document preservation, back up, and data recovery.
- Faster retrieval response time.
- Accurate and secure document delivery.
- Optimal investment in Munis.
- Increased operational efficiencies by having all documents generated during a pre-defined business process.
- Archived information for future use.
- Inbound Document Capture, facilitating either batch or one-at-a-time document scans.
- Option to upgrade to TCM Enterprise, bringing together best practices to eliminate the paper process across your entire organization.

Basic Fundamentals and Prerequisites:

Capture and Scan

TylerForms and GoDocs

Each day your users print volumes of paper forms using TylerForms Processing (prerequisite). The first step in managing these forms is adding them to the Munis system. Checks, purchase orders, vendor invoices, W-2s, and more need to be turned into digital documents. By integrating TCM SE with 16 TylerForms, we automated the process of imaging, indexing, and storing these documents, enabling information to be acted upon directly from Munis applications. Output delivery is enhanced and customized to meet your needs.

Capturing System-generated Reports

TCM SE eliminates inefficient printing and distribution of system-generated reports with an automated process that captures, indexes, and stores reports as they are printed. TCM SE automatically transfers these reports into images for storage and later retrieval. Easy to display, print, and e-mail, reports can be retrieved directly from Munis screens, even by multiple people at the same time.

Clients using Munis 6.5 and 7.2 can also use the Scheduler to further automate reporting. Through this advanced tool, users can include links to reports submitted to TCM SE during a scheduled job and can even set notification options to retrieve a document in a Web browser.

Optical Character Recognition (OCR)

All content contained within TCM SE is processed through optical character recognition (OCR), enabling easy full-text searches and enhanced data capture. Document templates may be configured so that when a document image (TIFF) is captured, it is automatically subjected to OCR processing. After the processing takes place all converted OCR data is stored in an index with the document image itself, enabling users to do a full-text search and find needed information right from basic or advanced searches.

Scanning Paper to Capture

Scanning paper into a digital format is a key component of TCM SE, and our capture interface functionality is the right tool for the job. By using TWAIN-compliant scanners and the TCM SE user interface, converting paper documents has never been easier. Inbound document capture allows your organization to easily process documents received in a variety of ways. Users

scan documents directly into TCM SE using the single scan interface (for one document at a time) or batch scanning (for multiple documents). Scanning with OCR also ensures the high volumes of documents you handle every day are always easy to retrieve through full-text search.

Batch Scanning to Capture

For large batch “uploads” of document records, batch scanning works with or without bar codes. By using bar codes, TCM SE can automatically index information contained within the bar code, reducing or eliminating the need for time-consuming indexed data entry.

Munis Batch Invoicing Capture (6.5 and 7.3)

This tool allows users to efficiently complete the Accounts Payable invoice creation process in Munis through the use of bar codes. At the time of invoice entry, Munis creates a placeholder document in TCM SE and prints a bar code label to be affixed to each corresponding invoice. Users can then easily batch scan invoices and TCM SE automatically attaches an invoice image to the appropriate previously-stored placeholder document.

Capture Network Documents

In addition to scanning paper documents, users have the option to acquire content through the “File Open” dialog. This allows users to browse the local or network directory structure to locate desired electronic file(s). Users may also utilize “drag-and-drop” capabilities for data capture —the choice is yours.

Retrieval

Munis Document and Image Access

Easy access to content related to Munis is central to the needs of end users. That’s why we designed TCM SE to store exact copies of document images and link them to corresponding Munis transactions, providing users with instant access to documents right from within Munis. TCM SE supports a variety of electronic files and document images (TIFF, PDF), photos (JPEG), Microsoft® Office documents (Word, Excel®, PowerPoint®, and more), drawings (DWF, DWG), and any other electronic files that a client wishes to store and manage. Users can easily view all the associated documents during the business process.

TCM SE also cross-indexes related documents so users can quickly access all related content. For example, a user may want to view related vendor invoices, purchase orders, checks, packing lists, and contracts for a specific transaction. Or an employee may want to view all of her personnel documents, including W-2, direct deposit, I-9, and W-4 forms. TCM SE makes it easy.

TCM SE is enabled in 98 Munis screens (Munis 7.4) through the camera icon, making it possible for users to retrieve documents without ever leaving familiar Munis business applications. This frees up employees for more strategic tasks, reduces human error, and creates an audit trail to support your organization's requirements.

Document Search and Image Retrieval for Power Users

Searching with TCM SE is easy. It provides users with multiple documents and image retrieval options. Users have one common search screen for all document types, can filter searches by one or more document types, and can deliver results to the user based on security permissions, so a user only sees documents he or she has privileges for. Full-text searches are extremely efficient for searching through large text databases. With TCM SE, power users can create advanced search queries and end users can easily search across multiple document types—all from the same screen. Multiple documents can also be selected and opened for simultaneous viewing. Users can also search for an image directly from TCM SE, then navigate the Munis application to an integration point, or can view a document after reviewing the Munis account detail, such as in the case of a vendor invoice. The choice of viewing is yours!

Munis Enabler 7.2+

The Enabler in Munis (7.2+) is an important tool that makes it easy for users to access documents. When the camera icon, located in more than 98 Munis programs (Munis 7.4) is selected, a new screen displays links to documents that have been created, configured, and named by your organization. Advanced security ensures users only see the documents and information they have permissions for, and only authorized Munis user can create links to new documents for display.

Document Management

Records Management

Analysts estimate that 10-20% of all paper documents within an organization get lost. You need complete control of your business processes through consistent document retention — and we can give it to you. TCM SE is much more than a secure repository to store and share your documents. It automates the storage of inbound and outbound document copies and ensures they are retained in a consistent and reliable manner. Comprehensive records management and version control guarantee that users see correct and up-to-date content every time, and eliminate endless e-mail threads with multiple attachments. In addition, documents are indexed to enhance efficiency, full-text search enables rapid access to content stored in TCM SE, and security

and audit trails track all actions to enhance compliance.

Manipulating Images

Icons located on the TCM toolbar allow for the easy viewing, manipulation, and markup of document images.

- Arrow Buttons — Scroll through a document with multiple images.
- Zoom In/Zoom Out — Look closer at a particular section of a document or zoom out for a broader image view.
- Edit Document —Reorder pages in a particular document.
- Annotate Document — Add document annotations from a separate menu.
- Sticky Note —Post a note on the image.
- Create Text Stamp — Create a text box for adding notations.
- Highlight Image — Highlight image text.
- Edit Annotations — Display a list of all annotations (highlights, text stamps, and sticky notes).

Security

Comprehensive security features allow you to set access privileges at the document, folder, or individual level — ensuring that only authorized team members have access to sensitive content. But the security of your content extends far beyond access restrictions to highly sensitive documents. Searches can be filtered by one or more document types, and results are delivered to the user based on security permissions, so users can only access the documents he or she has privileges to. In addition, we created all administrative options to be configurable, ensuring that TCM SE can change as quickly as your organization does.

Data Entry

Data entry can be one of the more time-consuming tasks associated with content management. TCM SE was designed with the right tools for increasing worker productivity, speed, and efficiency. For ease of data entry, data fields are presented side-by-side with the document image. In many instances, keyboard “hot keys” may be used to speed up the data entry process, reducing the number of required keystrokes by as much as 90%. Index fields can be created and maintained based on the specific needs of the users, and can be allocated as different types (standard data field, date field, check box, drop-down box, and more). What's more, users can apply data formatters to index fields (such as different date formats and SSN), as well as data validation to provide a higher level of data integrity. Additionally, basic OCR (a standard feature of TCM SE) allows users to “copy & paste” data from the scanned image into the data/index fields.

Get Ready, Get Set...GO

Ready to enjoy the benefits of TCM SE? We make it easy. There are no seat licenses to consider, and an unlimited number of users can retrieve needed document images. And, we are with you during every step of the implementation process—from planning, to execution, to change management.

From purchase to go-live, a TCM SE implementation can take anywhere between three to six months. To begin the process, one of our Project Managers—responsible for organizing all installations, software configurations, and training—hosts a project kick-off meeting. A discussion of all hardware, software, and scanner requirements and the appointment of a key IT administrator who understands your unique technical environment take place. During the implementation we install the TCM client on three to four computers, printers, and scanners and train your IT administrator step-by-step how to install the additional clients. In addition, the Project Manager coordinates the installation and configuration of TylerForms and eight to ten related document types; four to five associated documents for Finance; and four to five documents for Human Resources.

TCM SE is designed to be completely configurable to our clients' needs, so you start capturing documents right away—the right way. We standardized content management extensions and bundled them into a package for easy installation and configuration. This process includes indexing and storing your most popular Munis documents. We also pre-configured user access from logical integration points in our inquiry screens so users only have to select an icon on the tool bar to access what they need. Once TCM SE is installed, we provide your Munis users with basic training, including on-site training, videos, and user guides. These tools are designed to teach users about the new features and benefits of TCM SE, and to create an awareness of how this enhancement helps them in their day-to-day activities.

After the Go

TCM SE ensures that your Munis documents are processed and retained in a consistent and efficient manner — giving your users easy access to the information they need, when they need it. With TCM SE you can cut costs by removing costly paper trails, reallocating labor, and speeding up process times to drive efficiency. And, you have the freedom to add additional documents and revise processes at any point to fit your organizational changes. Why continue to use inefficient filing systems and waste money on costly printing and paper costs? With TCM SE, your Munis documents are there when you need them — accessed right from your desktop.

Now, sit back and enjoy the savings.