

MUNIS QSG

QUICK START GUIDE

Activity: Attach Supporting Documentation Using Attach Function

Attach supporting documentation from saved files

1. Click **Attach** while on a Munis screen that has attachment availability
2. Select the document mapping where the attachment will be located
 - a. The default mapping is listed in the upper pane
 - b. If a different mapping is to be used, select that document mapping from the lower pane
3. Click **View Documents**
4. Attach all required documentation
 - a. Click **New**
 - b. Click **Import**
 - i. Click **Choose File**
 - ii. Navigate through the browse window and select the document that will be attached
 - iii. Click **Open**
 - c. Click **Import** in the **Import Document** popup to load the selected file
 - d. Click **Save** (document is **not** attached until it is saved)
 - e. Repeat steps **a** through **d** to attach more documents, or click **Close** to return to the original screen



As an alternative to step **4b i** to **iii**, a file can be dragged directly from a folder or the desktop to the **Drop files here...** label immediately after clicking **Import** in step **4b**.

Configure direct scanning (prior to direct scanning for the first time)

Direct scanning will **only** work from a Windows environment – it will not function on an Apple

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2. Select the document mapping where the attachment will be located
 - a. The system will have a default mapping in the upper pane
 - b. If a different mapping is to be used, select that document mapping
3. Click **View Documents**
4. Attach all required documentation
 - a. Click **New**
 - b. Click the gear icon adjacent to **Scan**
 - i. Select **Scanner** as **WIA-HP LJ400 M425** (this may vary depending on scanner model)
 - ii. Select **Paper Source** as **Autofeeder**
 - iii. Select **Image Type** as **Black & White** or **Grayscale**
 - iv. Enable or disable **Show Scanner Dialog** (optional setting – see below)
 - v. Click **OK**
 - c. To attach documents, proceed to step **4b** below



Show Scanner Dialogue enables the use of the standard scanner screen (the same one used while scanning to computer) while in Munis. This enables additional functions such as adding/removing pages or adjusting brightness.



Users who primarily use the flatbed instead of the autofeeder will select **Paper Source** as **Flatbed**.

Attach supporting documentation via direct scan

1. Click **Attach** while on a Munis screen that has attachment availability
2. Select the document mapping where the attachment will be located
 - a. The system will have a default mapping in the upper pane
 - b. If a different mapping is to be used, select that document mapping
3. Click **View Documents**

4. Attach all required documentation

- a. Click **New**
- b. Click **Scan** – document scans into TCM
- c. Click **Save** (document is **not** attached until it is saved)
- d. Repeat steps **a** through **c** to attach more documents, or click **Close Viewer** to return to the original screen



The **Workflow** option in the ribbon is not used. Disregard this option in the ribbon during and after the attachment process.