

Tyler Dashboard User Guide

Using the Tyler Dashboard v4 with Eden
12/1/2011

	Contents
Tyler Dashboard Overview	1
Navigating the Tyler Dashboard.....	2
Dashboard Terms.....	3
Menu Bar	3
Using the Tyler Menu	3
My Programs menu	4
Personal Preferences menu.....	4
Working with Views	5
To add a View.....	5
To edit a View.....	5
To delete a View.....	6
Working with Favorites	7
My Programs favorite links	7
My Favorites Web Part.....	8
Customizing with Web Parts in a View.....	12
To add Tyler Web Parts.....	12
To add third-party Web Parts	12
To remove a Web Part	13
To close or hide a Web Part.....	13
To reopen or display a Web Part.....	13
To move Web Parts within a View.....	14
To personalize a Web Part.....	14

To reset a View to the default Web Parts.....	14
Web Parts Toolbar	15
Web Part Buttons	16
Refreshing data in a Web Part	17
Manually refreshing data	17
Automatically refreshing data	17
Resetting a Web Part	18
Viewing detail of Web Part data	19
To turn off the Detail Viewer feature.....	19

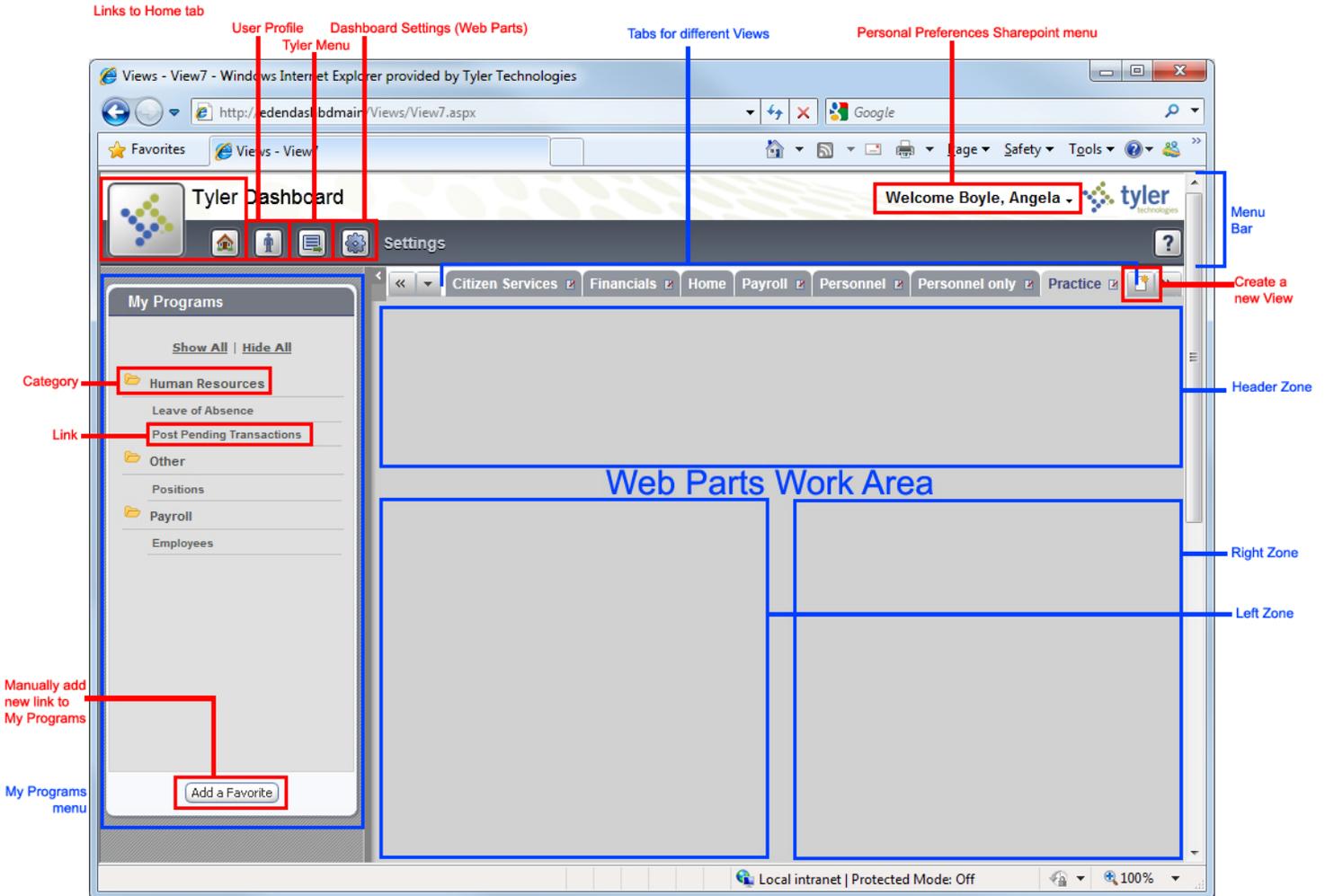
Tyler Dashboard Overview

The Tyler Dashboard is a web-based program through which you can work in Eden and other applications from a single work area in your web browser. Through the Dashboard, you can share information, view critical processing information, and access daily work from a single launching point. Though you do not need to have Eden installed, Eden will automatically try to install if you click to open an Eden form from the Dashboard.

The Dashboard is based on Microsoft® SharePoint® Services 3.0, so it has the same basic functionality. You can customize your Dashboard with multiple Views set up for your tasks by using multiple Web Parts. Tyler provides Web Parts specific to the Dashboard.

Navigating the Tyler Dashboard

The Tyler Dashboard is made up of four main parts: the Menu Bar, the My Programs menu, the tabs for different Views, and the Web Parts Work Area. These four sections appear on every View, but only the information in the Web Parts Work Area changes.



You can create your own customized Views for your tasks. Some Views may have default Web Parts set up by a site administrator on a shared View. When you add a new View, you can change the View number in the default URL. If the URL is the same as an existing shared View, your new View displays any Web Parts an administrator set up on the shared View. You can then customize the View with the Web Parts needed for your tasks.

Dashboard Terms

The following is a glossary of terms used to describe the Dashboard.

Exception – An error. Exceptions appear in red text near the top of the Web Part. Site administrators can view all your exceptions for a given day using the Exception Viewer.

Favorite – User-created links to Views, Eden forms, and web pages.

Menu Bar – Buttons across the top of the Dashboard.

View – A group of Web Parts

Web Part – Frames containing specific data, which can be added to a View

Menu Bar

From the Menu Bar, you can customize the Dashboard. Usually, you will only need to change these settings the first time you visit the Dashboard; however, you can modify these settings at any time.

Button	Name	Description
	Home	Display your primary Dashboard View (Home View).
	User Profile	Eden does not use this feature.
	Tyler Menu	Display the Tyler Menu Web Part with the Eden 'system' menu in a View separate from your custom Views. Note that you will not have access to your custom Views when the Tyler Menu is open in this View; you can reopen them by clicking Home on the Menu Bar.
	Dashboard Settings	Open the Available Web Parts frame where you customize the information that appears in the Web Parts Work Area. Note that you click your user name in the upper right of the page to customize your SharePoint Settings.

Using the Tyler Menu

The Tyler Menu displays the Eden menu. The Dashboard displays your currently selected menu, whether that is the 'system' menu or a custom menu. The Dashboard is integrated with Eden form security, which means you will get an error about insufficient security when you try to open forms you do not have permission to.

The Eden menu works the same from the Dashboard as it does without the Dashboard. You click a form name to open a form. To open Eden forms from the Dashboard, you must use NT Authentication to log on to Eden.

You can work with the Eden menu:

- Click **Tyler Menu** from the Menu Bar: the Eden menu opens in a separate View. For more information, see the “[Menu Bar](#)” section of this document.
- Click the **Dashboard Settings** button and add the Tyler Menu Web Part to a View (under the Tyler Dashboard category): The Eden menu displays in a Web Part on the specific View.

My Programs menu

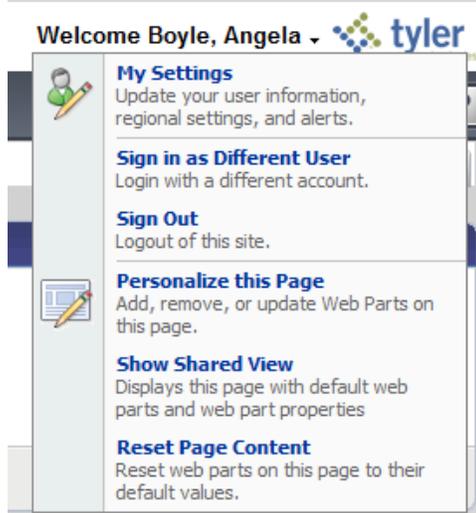
In the My Programs menu, you can create a list of your most used Eden forms, Views, and web sites. Click ‘Show All’ to expand the list of favorites; click ‘Hide All’ to collapse the list of favorites.

For more information about customizing the My Programs menu, see the “[My Programs favorite links](#)” section of this document.

Personal Preferences menu

Use the Personal Preferences menu to maintain your personal settings and to personalize the View. You can also sign out of the Dashboard or sign in as a different user.

To open the Personal Preferences menu, click the down arrow next to your name at the top of the page.



Working with Views

Views display a set of Web Parts. You can create your own Views. Using multiple Views, you can customize individual layouts for the various functions you perform. For example, if you are a manager, you can create a View related to your employees and a View related to important financial information, such as your budget.

The Tyler Dashboard displays Views in a tab format. Click on a tab to open a different View. Click on the down arrow to the left of the tabs to display a list of all your Views.

Shared Views are created by site administrators to provide the default Web Parts for a specific URL. If you create a new View that has the same URL as a shared View, the Web Parts set up in the shared View display automatically. However, you can still add your own Web Parts and hide the default Web Parts. Your site administrator will tell you what URLs are set up with shared Views.

To add a View

When you add a new View, it does not automatically open. Open the new View to customize it. If the View is based on a Shared View it will display the Shared View's default Web Parts, but you can add or remove any Web Parts.

1.  Click the **Add a View** button.
2. Enter the title of the View (**Name** field). It cannot be the same title as an existing View.
3. If you know the URL of a specific shared View you want to use for your default Web Parts, you can change the number in the file name in the URL.
4. Select whether to open the View in a new window. Depending on your browser settings, a new window might open a new tab within the same browser window or a new window.
5. Click **OK** to save the new View.

To edit a View

When you edit a View, you can change the name and the View number in the URL. To edit the layout of the Web Parts on a View, see the [“Customizing with Web Parts in a View”](#) section in this document.

1.  Click the **Edit** button on the tab for the View you want to change.
2. Make the necessary changes.
3. Click **OK**.

To delete a View

When you remove a View, you delete any customizations to the View. If you later add a View with the same name and URL, any changes you made to the original View will not display. Only the default Web Parts from a shared View display.

1. Click the **Edit** button on the tab for the View you want to delete.
2. Click **Delete**.

Working with Favorites

Favorites are links to the Eden forms, Tyler Dashboard Views, and websites that you use frequently.

You can add links in the My Programs menu where they will always be visible and available to you regardless of your current View. You can also create a set of your favorite links in the My Favorites Web Part, which is specific to the each View. You must add the favorites in the My Favorites Web Part to each View separately.

My Programs favorite links

Your favorite links in My Programs are available regardless of the View that is displayed.

To add an Eden form favorite

1. Navigate to the Tyler Menu Web Part by clicking the **Tyler Menu** button in the Menu Bar.
Note You can also open a View that has the Tyler Menu Web Part, but you will need to ensure that the My Favorites Web Part is closed or move to a View without the My Favorites Web Part.
2. On the Tyler Menu Web Part, right-click the form you want to add. A message displays so you can add the form to your list of favorites.
3. Click **OK** to add the form to your favorites. The form name displays on the My Programs list.
Note If the form that you add is the first for the module, a folder with the module name is automatically added to the My Programs list. The forms are listed in alphabetical order under the module name. You can change the folder the form is under, but the each folder is automatically alphabetized.

To add a View favorite

1. Navigate to the View you want to add to the My Programs menu.
2. Click **Add a Favorite** on the My Programs menu.
3. Enter the name of the View as the name of the favorite link (**Name** field). It cannot be the same name as an existing link.
4. The URL defaults to the address for the selected View (**Type: URL** field).
5. Select the folder name under which the web site should be listed or type a new folder name in the **Category** field.
6. Check the **Open in a New Window** field if you want the web site to open in a new browser window. Depending on your Browser settings, the View might open in a new tab in the browser window.
7. Click **OK**.
The View displays on the My Programs menu.

To add a website favorite

1. Click **Add a Favorite** on the My Programs list.
2. Enter the name of the website (**Name** field). It cannot be the same name as an existing favorite link.
3. Enter the URL for the website in the **Type: URL** field.
4. Select the folder under which the website should be listed or type a new folder name in the **Category** field.
5. Check the **Open in a New Window** field if you want the web site to open in a new browser window. Depending on your Browser settings, a new window might mean a new tab in the browser window.
6. Click **OK**.
The web site displays on the My Programs list.

To edit a favorite link

1. In My Programs, click the **Edit** button for the link you want to change. The **Edit** button appears to the right of the link when you hover your cursor over the link.
2. Make the necessary changes. You can change the name and category of any link. For a link to a website, you can also change the URL and whether it opens in a new window or the same window.
3. Click **OK**.

To delete a favorite link

When you delete the only link under a folder, the folder is also deleted.

1. In My Programs, click the **Edit** button for the link you want to delete. The **Edit** button appears to the right of the link when you hover your cursor over the link.
2. Click **Delete This Favorite**.

My Favorites Web Part

Use the My Favorites Web Part to create links to frequently used websites, Dashboard Views, or Eden form on a specific View.

Links in the My Favorites Web Part are listed in alphabetical order by description. You can view them in a list or as tiles (icons): click 'List View' or 'Tile View.'

Setting up the My Favorites Web Part

The My Favorites Web Part works is added from the Tyler Dashboard category of Web Parts. This Web Part works well in conjunction with the Tyler Menu Web Part.

Use the directions in the “[Customizing with Web Parts in a View](#)” section to add the My Favorite Web Part to the View (under Tyler Dashboard category). If you plan to add an Eden form to the My Favorites Web Part, you should also add the Tyler Menu Web Part.

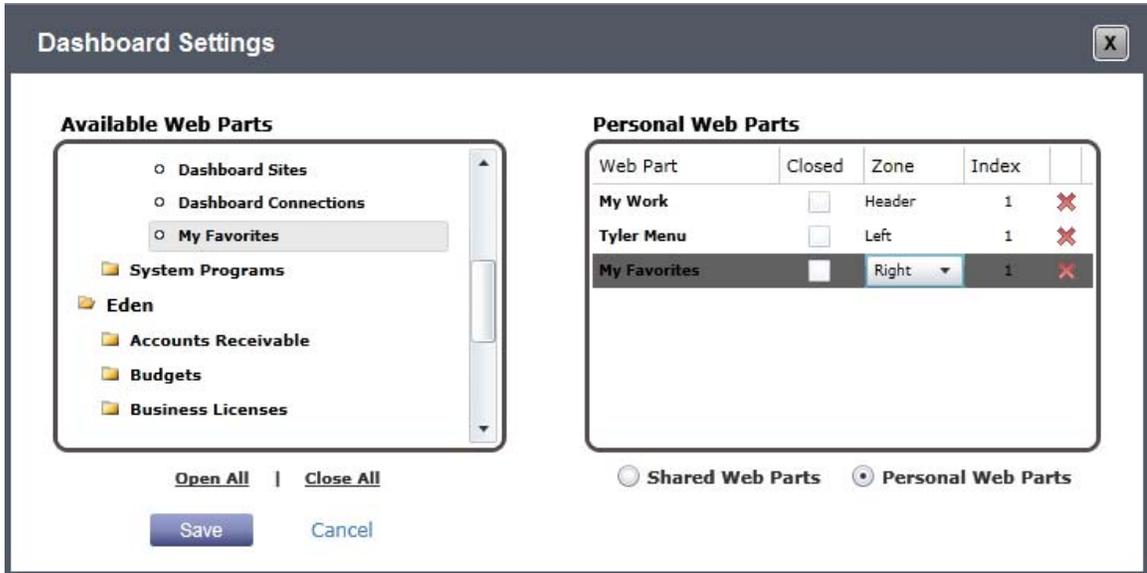


Figure 1: Dashboard Settings with the My Favorites Web Part added

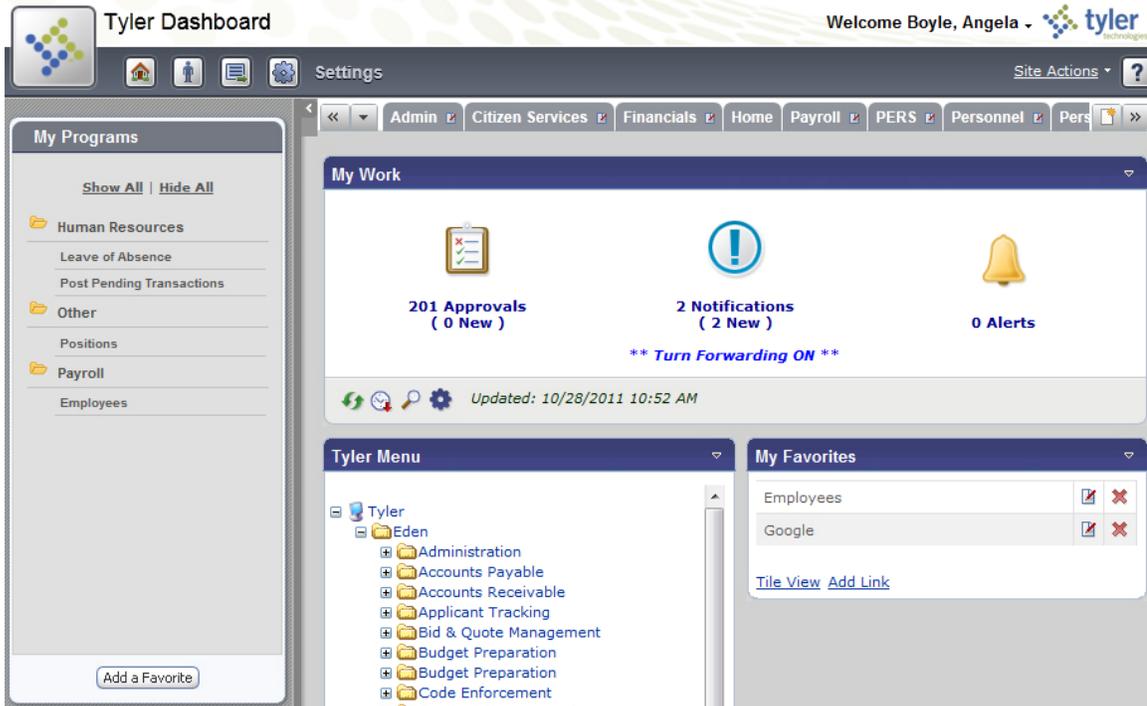


Figure 2: Tyler Dashboard View with My Favorites Web Part

To add an Eden form

The Tyler Menu Web Part must be open in the same View as the My Favorites Web Part. You cannot use the **Tyler Menu** from the Menu Bar.

1. Navigate to the View you want to change.
2. In the Tyler Menu Web Part, right-click on the form that you want to add to your favorites.
A message displays so you can add the form to your list of favorites or cancel the change.
3. Click **OK** to add the program to your My Favorites.
The program displays on the favorites list on the My Favorites Web Part.

To add a View

You will need to know the URL for the View you want to add to your favorites. With the View selected, copy the URL from the address field of your browser. Switching to another View while the Add a New Link fields are open removes your changes to those fields.

1. Navigate to the View you want to change.
2. In List View in the My Favorites Web Part, click 'Add Link' on the My Favorites Web Part.
The program displays the Add a New Link fields.
3. Enter a description of the View in the **Name** field.
4. Enter the file name for the View (**URL** field). For example, if the URL is 'http://TylerDashboard/Views/View7.aspx,' enter `View7`.
5. Select 'View' under **Type**.
6. Indicate whether the View should open in the same window or a new window in the **Open In** field. A new window might mean a new tab in the same browser window depending on your browser's settings.
7. Click **OK**.

To add a web site

You can copy the URL of the website before you start to add the new link, but switching to another tab in your browser or another browser window does not cancel your changes.

1. Navigate to the View you want to change.
2. In List View of the My Favorites Web Part, click 'Add Link.'
The program displays the Add a New Link fields.
3. Type a description of the web site in the **Name** field.
4. Type the URL for the website (**URL** field).
5. Select 'URL' under **Type**.
6. Indicate whether the website should open in the same window or a new window in the **Open In** field. A new window may open in a new tab in the same window depending on your browser's settings.
7. Click **OK**.

To edit a favorite link

1. Navigate to the View you want to change.
2. On the My Favorites Web Part, click the **Edit** button for the link you want to change.
3. Make the necessary changes. You can change the name of any favorite. For URLs or Views, you can also change the URL, type of link, and whether it opens in a new window or the same window.
4. Click **OK**.

To delete a favorite link

1. Navigate to the View you want to change.
2. In the My Favorites Web Part, click the **Delete** button for the link you want to delete.

Customizing with Web Parts in a View

The Tyler Dashboard is delivered with some general purpose Web Parts—for example, My Work. Web Parts that are specific to a module—for example, Open Violations for Eden Permits—are provided with the module.

Note

If you do not see a Web Part that you need, your agency can create one (see the SharePoint help for more information) or you can enter an RFS (Request for Service) with Tyler.

To add Tyler Web Parts

Anyone can add personal Web Parts to their Views, but only that user will see that Web Part. Site administrators can add Web Parts to shared Views.

1. Navigate to the View you want to customize.
2. Click the **Dashboard Settings** button in the Menu Bar.
3. If you are a site administrator, be sure to select **Personal Web Parts**. If you select **Shared Web Parts**, you will add the Web Part to the View for every user. If you are not a site administrator, these fields are inactive.
4. In the Available Web Parts area, open the category of the Web Part you want to add.
5. Click the name of the Web Part you want to add. Click only once or the Web Part is added twice.
6. In the Personal Web Parts area, set up the placement of the Web Part on the View.
 - Select the position for the Web Part (**Zone** field). The 'Header' zone is across the top of the Web Part Work Area, and 'Right' and 'Left' zones are two equal-width columns below the 'Header' zone.
 - Select the index (order within the zone) for the Web Part. A smaller number is visually higher on the page.
7. Repeat steps four through six until you have added all the Web Parts to the View that you want.
8. Click **Save** to save your changes.

To add third-party Web Parts

Third-party Web Parts are mostly from SharePoint, but you can also add Web Parts from websites that are set up like SharePoint.

1. Navigate to the View you want to customize.
2. Click 'Welcome' in the Menu Bar.
3. Click 'Personalize this Page.'
4. In the zone that you want to add the third-party Web Part, click **Add a Web Part**.
5. Check each Web Part you want to add to that zone.
6. Click **Add**.

7. Click 'Exit Edit Mode' in the upper right of the Web Parts Work Area.

To add Microsoft Outlook® to your Dashboard, select the Page Viewer Web Part. Then modify the Web Part (from the Web Part's drop-down menu) and enter the URL—for example, to your agency's Outlook Web Access. You may also want to adjust the Appearance section, which includes the title of the Web Part and the height on the View—for example, 600 pixels.

To remove a Web Part

When a Web Part is removed from a View, all personalization for the Web Part is also removed. You can simply close a Web Part to remove it from your screen but keep the personalization; see the "[To close or hide a Web Part](#)" section of this document.

If there is a Web Part you cannot remove, it is a shared Web Part. Only an administrator can remove a shared Web Part from a View, but you can close them.

1. Navigate to the View with the Web Part you want to remove.
2. Click **Dashboard Settings** on the Menu Bar.
3. If you are a site administrator, be sure to select **Personal Web Parts**. If you select **Shared Web Parts**, you will remove the Web Part from the View for every user.
4. In the Personal Web Parts area, click the **Delete** button for the Web Part you want to remove from the View.
5. Repeat until you have deleted all the Web Parts you want from the View.
6. Click **Save** to save your changes.

To close or hide a Web Part

Though you cannot delete a shared Web Part, you can close it or any personal Web Parts. The Web Part will no longer display on the View for your user. You can reopen the Web Part to see it on the View again.

1. Navigate to the View with the Web Part you want to hide.
2. Click the arrow in the upper right of the Web Part.
3. Click 'Close.'

To reopen or display a Web Part

When a Web Part is closed, it is not removed for the View. Any personalization you made to the Web Part is saved for when you reopen it.

1. Navigate to the View with the Web Part you want to reopen.
2. Click **Dashboard Settings** in the Menu Bar.
3. If you are a site administrator, be sure to select **Personal Web Parts**. If you select **Shared Web Parts**, you will remove the Web Part from the View for every user.

4. In the Personal Web Parts area, clear the **Closed** field for the Web Part.
5. Click **Save** to save your change.

To move Web Parts within a View

After you have added Web Parts to a View, you may want to move them around the page.

1. Navigate to the View you want to change.
2. Click **Dashboard Settings** in the Menu Bar.
3. If you are a site administrator, be sure to select 'Personal View.' If you select 'Shared View,' you will move the Web Part's default location.
4. In the Personal Web Parts area, change the position (header, left, or right) for the Web Part.
5. Change the index (order within the position) for the Web Part. A smaller number is visually higher on the page.
6. Repeat steps four and five until you have all the Web Parts where you want.
7. Click **Update** to save your changes.

To personalize a Web Part

When you personalize a Web Part, you always have the option to change its appearance, such as height, width, location, and title. Some Web Parts also have custom fields to define the data, such as a time period.

1. Navigate to the View you want to change.
2. Click **Modify this Web Part** in the Web Part Toolbar.
3. In the Web Part Settings frame, make the necessary changes.
4. Click **OK** to save your changes and close the Web Part Settings frame. Click **Apply** to save your changes and leave the frame open to make more changes.

To reset a View to the default Web Parts

After you have made changes to a View, you can reset the View back to its default. If the View started blank, it will be reset to a blank Web Parts Work Area. If the View had default Web Parts to begin with, the View is reset to those default Web Parts. Any customizations you made to Web Parts on the View will be lost.

1. Navigate to the View you want to reset.
2. Click 'Welcome' in the Menu Bar.
3. Click 'Reset Page Content.'
4. A warning screen opens. Click **OK**.

Web Parts Toolbar

Use the Web Parts Toolbar to perform several actions for the Web Part. You can refresh the Web Part, reset the Web Part to its default settings, set the auto refresh timer, view the Web Part in a new window, or maintain settings for the Web Part. The Toolbar also displays the date and time of the last update to the Web Part.

You can remove the toolbar when you modify the Web Part. When you remove or modify the toolbar, you must close and reopen your Dashboard to see the changes. If you remove and re-add the Web Part, the toolbar displays by default.

Button	Name	Description
	Refresh	Update the data displayed in the Web Part.
	Reset	Return the Web Part back to its default settings, removing any personalization. Any opened browser pages, selected data, or displayed error messages for the Web Part are closed.
	Auto Update	Toggle the Auto Update feature. If the arrow on the button is green, Auto Update is currently active. If the arrow is red, Auto Update is inactive. You can modify the interval to update the Web Part in the Web Part Settings frame by clicking the Modify this Web Part button.
	Detail Viewer	Open a new Tyler Dashboard window with just the selected Web Part.
	Modify this Web Part	Open the Web Part Settings frame. Use the Settings to customize the Web Part: appearance, layout on the View, and any individual settings or parameters that must be established.

Web Part Buttons

The data within a Web Part often includes various buttons for more actions.

Button	Name	Description
	Folder	Expand the item to view related sub-records.
	Calendar	Select a date from a calendar for a date field.
	Binocular	View details for an item, such as an exception.
	Edit	Edit the properties of an item, such as a favorite link.
	Delete	Remove the item from the Web Part, such as a favorite link.

Refreshing data in a Web Part

Some Web Parts show data that can be changed outside the Tyler Dashboard. Usually, these are the Web Parts that show data maintained in Eden—for example, pay periods.

When a Web Part is loading data, the Web Part toolbar displays a progress bar.

Manually refreshing data

To manually refresh data in a Web Part, click the **Refresh** button. The **Updated** field in the Web Part tool bar displays the date and time when the data for the Web Part was last updated.

Automatically refreshing data

You can optionally set Web Parts to automatically refresh the data in predetermined intervals. You must turn on the timer for each Web Part separately. You can set up each Web Part to have a different amount of time between updates.

The **Auto Update** button displays as green when the auto update timer is active. You can turn the auto update timer off by clicking the **Auto Update** button or the **Refresh** button.

To turn on and off automatic updates for a Web Part

As an alternative to clicking the **Auto Update** button to toggle the Auto Update feature for a Web Part, you can manually update the Web Part using the Web Part Settings frame.

1. Navigate to the View with the Web Part.
2. Click **Modify this Web Part** in the Web Part Toolbar.
3. In the Web Part Settings frame, open the Tool Bar Settings section.
4. Set the **Allow Auto Update** field to 'No' to turn off the feature or 'Yes' to turn it on.
5. Click **OK** to save your changes and close the Settings frame.

To set the frequency for automatically updating a Web Part

Changing the timer does not automatically turn on the Auto Update for the Web Part. By default, Web Parts are automatically updated in intervals of 30 minutes. You can change the interval.

1. Navigate to the View with the Web Part that you want to change the timer for.
2. Click **Modify My Web Part** in the Web Part Toolbar.
3. In the Web Part Settings frame, open the Tool Bar Settings section.
4. Enter the minutes between automatic updates in the **Auto Update Interval** field.
5. Click **OK** to save your changes and close the Settings frame.

Resetting a Web Part

To reset a Web Part back to its initial state, click the **Reset** button. Some Web Parts display a large amount of data in different frames as you work through the data and open different information. Resetting the Web Part closes any frames that opened and resets the Web Part back to the same state as when you first opened the View.

Some Web Parts do not include extra frames, so they do not include the **Reset** button.

Viewing detail of Web Part data

Some Web Parts can display a lot of detailed data, so you may want to open the Web Part in its own View where it will have more room to show the information.

To open the Web Part in a separate View, click the **Detail Viewer** button. The Web Part opens in a new browser window where it is the only Web Part. This gives you more room for expanding the data in other frames.

You can disable the detail view on a per-Web Part basis.

To turn off the Detail Viewer feature

1. Navigate to the View with the Web Part that you want to turn off the Detail Viewer.
2. Click **Modify this Web Part** in the Web Part Toolbar.
3. In the Web Part Setting frame, open the Tool Bar Settings section.
4. In the Advanced section, clear the **Allow Detail Viewer** field.
5. Click **OK** to save your changes.