



# Tyler Dashboard

*User Guide Version 6.1* 



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# Tyler Dashboard

The Tyler<sup>®</sup> Dashboard is a web-based application through which you can open Tyler products and other applications. The Tyler Dashboard allows you to share information, view critical processing information, and access daily work from a single launching point. You can customize your personal dashboard using web parts, or if you are a system administrator, you can add web parts that are used by everyone in your organization

This document outlines the general tasks for using the Tyler Dashboard. For specific details on using the dashboard with your Tyler product, refer to the documentation available for that product.

## **Tyler Dashboard Features**

The Tyler Dashboard setting and navigation options manage connections and display features. The Tyler Menu option displays your Tyler product menu as a floating menu, while your Favorites list provides easy access to those programs you use most often. The work/display area of the dashboard displays selected web parts.





## Search

On the home page, the Search box provides an integrated search tool for the Tyler Dashboard.

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Tyler Dashboard	Search	Q	^

When you use this option, the search results include records stored in Tyler menu and Munis central programs. For example, if you enter 100 as the search criteria, the results include employee records that include 100, customer records that include 100, accounts that include 100, and so on.

With additional setup, your SharePoint administrator can configure this search feature to also search items stored in your organization's SharePoint directories.

The search results display by category, for example, Vendor, Employee, Property, and so on. Highlight a category to view the results. If your SharePoint administrator has configured the search to include your SharePoint directories, the list also includes an entry for these results. Use the Sort Results By and Sort Direction options to change the sort order for the results.



## Browse

When you open the Tyler Dashboard, the Browse tab is the active tab. This tab is the home view for the dashboard. When you click the Tyler logo from other dashboard pages, the application returns you to the Browse tab.



## Page

The Page tab provides direct access to Microsoft<sup>®</sup> SharePoint<sup>®</sup> features. These features are specific to Microsoft SharePoint. When you make changes using these options, they will affect your Tyler Dashboard, but they are not changes supported by Tyler.

BROWS	E DASHBOARD	PAGE								
	Ve	rsions rmissions	$\bigcirc$	Ļ	-	×	Ì			Į
Edit Page *	Edit Properties - 🗙 De	lete Page	E-mail a Link	Alert Me ∓	Approve	Reject	Workflows	Edit Mobile Page +	Make Homepage	Title Bar Properties
Edit	Manage		Share &	Track	Appro	oval	Workflow	P	age Actions	

This option is only available to users with Site Collection Administration permissions.

## Dashboard

The Dashboard tab provides direct access to Tyler University and the Tyler Community.



To access these resources, your User Profile page must be completed with your Tyler user ID and password.

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BROWSE DASHBOARD			My Settings	1ENU	, [2]		
Dashboard - v105 - melfring Sign Out							
Tyler Dashboard							
			Apply Template				
EDIT VIEWS	User Profile	e	Clear User-Added Dashboard				
Home	eLearning User ID:	MUNIS - Maureen Bisho	Content				
🖍 Edit Favorites	eLearning password:	•••••					
Workflow Central	User ID:	tyler\melfring (melfring)					
Workforce Central Roles	Using:	GWC/SL - Genero Web Client/Silverlight					
Printer Definitions Tyler Forms Integration	ОК						
Configuration							

If you select an option in the Tyler University or Tyler Community group and your profile is not complete, the program displays a login page.



## **Tyler University**

Tyler University provides eLearning and other resources available to users. These eLearnings and resources include a mix of tutorials and documentation.

The Tyler University options include Launch TylerU, Enroll, and My Courses. When you click **Launch TylerU** in the ribbon, the Dashboard displays your home page for Tyler University.



Use the options within Tyler University to manage your personal training for Munis and Tyler products.

When you click **Enroll**, Dashboard provides a list of defined curricula for core and end users of Munis and Tyler products. Each option includes the resources available to complete the eLearning curriculum for that product area.



To enroll in a specific curiculum, select the check box and click **Enroll**. The page provides a confirmation next to the Enroll button.

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BROWSE DASHBOARD					q	CENTRAL SEARCH	TYLER MENU		1	
Dashboard - v105	- melf	ring							1	
🐝 🔣 Tylor D	20	hhoard							1	
	as	nboard								
DIT VIEWS		Curricula	BROWSE DASHBOARD							
		Munis - AP Cash Disburseme	Dathboard - v105	- molf	ing					
al Programs		Munis - AP Core User		- men						
flow		Munis - AP Curricula - Compre	i yier L	as	nboard					
dit Favorites		Munis - AP Curricula - Lite			Curricula					
loyee Master		Munis - AP End User	EDIT VIEWS		Munis - AP Cash Disbursements Core User					
ount Master		Munis - Budget Core User	Home Central Programs		Munis - AP Core User					
kflow Business Rules vice Order/Print	☑	Munis - Budget End User	Workflow		Munis - AP Curricula - Comprehensive					
ice Order Assignees		Munis - Cash Management Co	🖍 Edit Favorites		Munis - AP Curricula - Lite					
en Request Settings		Munis - Comprehensive - AP	Employee Master		Munis - AP End User					
ties ty Billing Customers		Munis - Contracts Core User	Account Master		Munis - Budget Core User					
ount Event History		Munis - Contracts End User	Workflow Business Rules Service Order/Print		Munis - Cash Management Core User					
nster Delinquent to Tax count History Inquiry/Report		Munis - Employee Expense - I	Service Order Assignees		Munis - Comprehensive - AP Cash Disbursement					
ogle tem Undate		Munis - Inventory - New Core	Citizen Request Settings		Munis - Contracts Core User					
Stem opdate		Munis - Inventory - New End U	Utilities		Munis - Contracts End User					
	Г	Enroll	Account Event History		Munis - Employee Expense - New End User					
			Transfer Delinquent to Tax Account History Inquiry/Report		Munis - Inventory - New Core User					
			Google		Munis - Inventory - New End User					
			System Update		Encoling Successfully enrolled in: Munis - Rudget End Lice					
					enter budget end osci					

Once you are enrolled in a curriculum, when you click **My Courses** on the ribbon, the program displays a list of the eLearning resources available for that curriculum.

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BROWSE DASHBOARD PAGE		ې	CENTRAL S	EARCH	🔅 WEB P/	ARTS		
Dashboard - v105 Tyler D	- melfring ash	board			(	Open		
	Status	Curriculum		Course Title				
Home		Munis Accounts Payable		Munis - AP Invoice wit liquidation	h no	Ð		
Central Programs Workflow	ms 🕕 Munis Accounts Payable Munis - Adding a Vendor 🖉							
harmon		Musis Arongi Manana and Andrew Andr		Munis - Accounts Paya	able	2		

The Status indicator displays your progress for a particular course.

Indicator	Description
0	Not Started
٩	In Progress
	Completed
$\odot$	Passed
8	Failed

Click the **Open** button to launch an eLearning course or click the course title to display a summary page for the course.



#### The summary page includes a discussion board and a document library for the identified course.

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BROW	VSE DASHBOA	RD PAGE									TYLER MEN	J [1]
Launch TylerU Tyle	My Courses	Search	i ≫ New Post									
Emple Emple Emple Emple Emple Save Payro Vence Current	EDIT VIEWS ie EDIT FAVORITES Ioyee Accruals Ioyee Deduction Ioyee Master "CM for Munis S em Miscellaneou (d Reports oll History Repo Jors Lima Tables	is ettings is Codes rt	Munis - Curriculum Descriptior Status: In P C Launch Discuss New • Subjec Welca to Tyl	Create a Dash Munis Dashboard, N croaress Course Material ion Board Actions - Set t Created By pome erU Created Tr	Aunis System Adm Withdraw from tings - Replies 0 nelfring	created 5/13/2014 12:08 PM	Body This discussion	Last Reply By	Last Updated 5/13/2014 12:08 PM	Best Response Id	View: Subjec Is Featured Discuss No	t • ion
Мар	Link Settings			1-1			board is a great place to ask your colleagues questions about this class.					
			Docum	ent Library								
			Actions •	Settings 👻						View:	Relink Document	s •
			Туре	Name	Relink	Modified		Modified By	Content Ty	rpe Terr	iplate Link	
				TylerU 🛙 NEW		5/13/2014 12:08 PM		melfring	Documer	ıt		

To launch the eLearning course from the summary page, click **View Course Material**. Click **Withdraw from Course** to cancel your enrollment.

#### **Tyler Community**

With the Tyler Community enabled, you can search, post, and access Tyler Community favorites directly from the Tyler Dashboard.

Prior to using the Tyler Community links, the Dashboard Tenant must be updated to include the base URL for the Tyler Community application. This value should be entered when your dashboard is installed. If this value is not entered, system administration personnel must use the Dashboard Administration option to enter the following value in the REST API Base URL box for the Tyler Community Services group on the Update Connections pane:

http://tylercommunity.tylertech.com/api.ashx/v2/

Once the Dashboard Services are updated to include the Tyler Community URL, you must establish a user API to access your personal Tyler Community pages.



To create an API key:

- 1. In the Tyler Community group of the ribbon, click the Identity option. The program displays the Tyler Community Identity dialog box.
- 2. Click **Edit** on the Tyler Community Identity dialog box. The program displays a second Tyler Community Identity box.

		melfring 🗸 🤷	?
BROWSE DASHBOARD		CENTRAL SEARCH III TVLER MENU	[0]
Q Search ☆ New Post ☆ Identity ☆ Favorites Tyler Community			
EDIT VIEWS	Tyler Community Identity	Add Connection	
<ul> <li>Edit Envoritor</li> </ul>		Active Duplicate Delete	
<ul> <li>My Favorites</li> </ul>	Community User Name: API Key:	✓ (i) (*	
<ul> <li>Recent Activity</li> </ul>			
Contracts Central Customer Central		Tyler Community Identity	
Invoice Central Workflow Central			
Property Central			
HR Command Center		East Settings	
Roles			
Central Administration		API Key:	
Vendors		Save	
System Lindate		How to Create an API Key	
Employee Job/Salary		1. Navigate to Tyler Community and click Settings	
Employee Master		2. Click the Advanced Options tab	
Records		3. Click Create and Edit Application Keys	
Vendor Maintenance		<ol> <li>Type a name for API Key and click Generate</li> </ol>	
Personnel Settings			
MUNIS Print Spool			
Employee Deductions			

3. Following the directions in this box for How to Create an API Key, open the Tyler Community and navigate to the Advanced Options tab on the Settings page.

tyler     who serve the public
Home Munis V Sandbox
 Basic Options       Sign-in Information       Email       Notifications         SITE OPTIONS       CONTENT EDITOR       Enhanced         ENABLE DISPLAY NAME       ✓         DISPLAY IN MEMBERS LIST       ✓         DISPLAY USEP, SIGNATURES       ✓         ✓       Wiki Payes (Cruste or edit wiki pages)         ✓       Wikis (Cruste new wikis)         MY API KEYS       Create and Edit Application Keys
Save
Privacy Statement   Terms of Use 🕴 😧 in

4. On the Advanced Options tab, click **Create and Edit Application Keys**.



5. Enter a key name and click Generate.

The program displays the API value in the results table.

Find Answers. Get Connected. Join the Di	scussion. 🌱 Maureen Bishop-Elfring   Conversations (1)   Settings   Favorite Places 🖯   Sign out
tyler technologies	Empowering people who serve the public
Home Munis 🗸 Sandbo	х
Name Dashboard X	enerate
Dashboard	rctbyc8dx5282g2qcowrlkrw 3 Jan 2013 Enabled Edit   Regenerate   Delete

6. Copy the key to the API Key box in the Tyler Community Identity dialog box.

Tyler Community Identit	y	X
Edit Sattings		
Community User Name:	Dashboard	
API Key:	rctbyc8dx5282g2qcowfkrw	
	Save Cancel	
How to Create an API Ke 1. Navigate to Tyler Comm 2. Click the Advanced Opti 3. Click Create and Edit Ap	y unity and click Settings ions tab oplication Keys	

- 7. Complete the Community User Name box with your customer support user name.
- 8. Click Save.

With the Tyler Community ribbon group enabled, you can search, post, and access your Tyler Community favorites directly from the dashboard ribbon:

• Search—Provides search functionality specific to Tyler Community items.

Tyler Commu	unitv Search		
· •		All	
		Forums	
		Users	
Search:		Groups	
		Blogs	
Group:	All	Wikis	~
•		Galleries	
Keywords:		Pages	
Search			
No search result	ts found		
NO Search lesui	is loullu		



• New Posts—Allows you to enter a question or discussion item to the Tyler Community.

Tyler Commu	nity New Post		X
New: Group:	Question Question Munis		
Forum:	Education News		
Title:		Search	
Description:	^	1	
		1	
Save		_	

• Favorites—Provides quick access to the list of favorites that you have created within the Tyler Community application.

Tyler Community Favorites		X
Title	Туре	
Munis	Group	

## Views

Views are personal dashboard views that you create to match your work requirements. For example, if you often access payroll programs, you could create a view that includes web parts and program favorites specific to payroll processing.

The Home view is the default view for the dashboard. You cannot delete or modify the settings for the Home view.



#### To create a view:

1. Click Edit Views to display the Edit Views dialog box.



- 2. Click Add View.
- 3. Type the name of the view in the Name box. The default value for the Location box is Next Available and you cannot change this.
- 4. Click Save View.

The program refreshes the dashboard to include the view in the Views group.

							j		1
BROWSE DASHBOARD PAGE				ş	CENTRAL SEARCH	III TYLER MENU	🗱 WEB	PARTS	[=
Dashboard - v104 - me Tyler Das	shboard								
EDIT VIEWS									
Home Payroll	My Employees				My F	avorites			
Workflow	My Employees	Out of Office	My Reminders		Goo	gle		×	
🖍 Edit Favorites	Direct reports only	v							
k k r					<u>Tile Vie</u>	Add Link			



5. Click the link for the new view. The screen refreshes and the work area is blank.

		melfring 👻 🔅	?
BROWSE DASHBOARD PAGE	р CENTRAL SEARCH 🏢 TYLER MEN	IU 🔅 WEB PARTS	[0]
Dashboard - v104 - melfring Tyler Dashboard			^
EDIT VIEWS			
Home Payroll Workflow			
🖌 Edit Favorites			
My Favorites			
<ul> <li>Recent Activity</li> </ul>			

- 6. With this view active, add the appropriate web parts and favorites to complete the view.
- 7. Click the Home view or click the Tyler logo to return to the main Tyler Dashboard page.



## **Favorites**

Edit Favorites manages the programs, websites, or other applications accessed from the My Favorites and Menu Favorites menu options. Edit Favorites also provides the option for creating new categories for organizing your personal dashboard menu.

To add a favorite, click **Edit Favorites** on the menu. In the Edit Favorites dialog box, click **Add Favorites**.

Edit Favorites	×	
My Favorites	Add a Favorite	×
Departmental Functions	Category: My Favorites	
Menu Favorites	Program Name: Executable/Url:	
<ul> <li>Utility Billing</li> <li>System Administration</li> </ul>	2 Open in a New Window	
	Add Category Save Favo	) rite
	Add Category Edit Settings	

Use the Add a Favorite dialog box to select the category and define the program name and applicable executable or URL. To add a new category, click **Add Category** and specify the category name.

Create a Category	×
Category:	
Save C	<b>B</b> Lategory



The Edit Settings options on the Edit Favorites dialog box provide additional options for personalizing your dashboard.

Edit Favorites	$\otimes$	
<ul> <li>My Favorites</li> </ul>		
Roles User Attributes	Edit Favorites	$\otimes$
Workflow Business Rules System Settings Saved Reports General Ledger Settings System Update	Include My Favorites in Programs: Include Recent Activity in Programs:	Yes No Yes No
Human Resources/Payroll	Max # of items returned in Menu Search:	20 Items
Financials	Max # of items returned in Central Search:	20 Items
▶ Recent Activity	Max # of items returned in SharePoint Search:	25 Items
Website Favorites	Max # of items returned in Web Part Search:	25 Items
System Administration		ً
		Save Settings
<b>O</b>		

Use these options to remove the My Favorites or Recent Activity options from your menu and to specify the number of items returned when you complete a search from your Tyler menu or the Central Programs menu (Munis-specific).

## **Web Parts**

Web parts are web-based portals that display information from various Tyler organizations or provide links to third-party applications. The Web Parts setting adds, removes, and arranges the web parts that are available on your personal dashboard. If you are a system administrator, you can also manage shared web parts.



To add a web part:

1. Click Web Parts on the dashboard.



- 2. In the Manage Personal Web Parts dialog box, select the tab for the tenant web part to add: SharePoint, Dashboard, or your Tyler product.
- 3. For that tenant, expand the lists of web part categories to find the web part to add.

Manage Personal Web Parts		$\otimes$
Munis     SharePoint     Dashboard       >     Accounts Payable       >     Accounts Receivable       >     Budgeting       >     Business Licenses       >     Executive/Board       >     General Ledger	Left	Right
MUNIS Workflow     Payroll     Accruals Available     Accruals By Day     Accruals Taken     My Employees     Open Payrolls     Overtime     Salaries      Permits & Code Enforcement	Show Shared Web Parts Show Perso	nal Web Parts
Work Orders, Fleet & Facilities Management		



4. Highlight the web part to add and drag it to the Left or Right position box.

Manage Personal Web Part	5	×
Munis     SharePoint     Dashboard       >     Accounts Payable       >     Accounts Receivable       >     Budgeting       >     Business Licenses       >     General Ledger       >     MUNIS Workflow	My Employees	My Favorites
	Show Shared Web Parts Show Pers	onal Web Parts

#### When you click Update, the dashboard refreshes to include the web part.

BIOWSE DASHBOARD INCE	and the second se	
	P CENTRAL SURICH INT TYLER	VENU 🔅 WEI PARTS
Tyler Dashboard		
Home My Employees	My Favorites	
Workflow My Employees Out of Office My Reminders	Google	8 8
Edit Favorites     Direct reports only     v		
My Favorites	The New Add Link	
* Recent Activity		
Workflow Central		
Work Order Central		
Workforce Central		
UB Central		
Permit Central		
* Menu Favorites		
System Update		
Employee Joh/Salary		
Employee Master		
Records Updated: 8/16/2013 3:17:37 PM 6		
Personal Settings		
MUNIS Print Spool		



5. Once a web part is added, click the close button to hide the web part from the view without removing it, or click the remove button to delete the web part from the view.



Use the Show Shared Web Parts and Show Personal Web Parts buttons to refresh the dialog box to display the personal view (your personal web parts) or shared view (web parts assigned and shared within your organization).

Manage Shared Web Parts			×				
Manage Shared Web Parts           Munis         SharePoint         Dashboard           Accounts Receivable             Basiness Econops         Basiness Econops            MUNIS Workflow             Perrols & Code Enforcement             Perrols & Code Enforcement             System Administration             Tax              Vork Orders, Fleet & Facilities	etcarning Links	Left Chevr Shared Web Parts Show Person	Munis SharePoint Dashboard Munis SharePoint Dashboard Accounts Proyable Accounts Recrivable Accounts Recrivable Basiness Lonners General Ledger MUNIS WorkBow Payroll Permits & Code Enforcement System Administration Fare System Dashboard Work Coders: Dash E-station	ts My Employees etearning Links	Beer Shared Web Parts     Brow Person	Right NJ Web Parts	
			Management				

Shared web parts are web parts that display for all users. Sharing web parts creates a default user view with web parts that individual users cannot remove. Only system administrators can manage shared web parts.



To add shared web parts:

1. In the Manage Web Parts dialog box, select the Show Shared Web Parts option. Manage Shared Web Parts

Munis     SharePoint     Dashboard       >     Accounts Payable       >     Accounts Receivable       >     Budgeting       >     Business Licenses       >     General Ledger       >     MUNIS Workflow	eLearning Links	Right
Payroll	Show Shared Web Parts Show Personal Web Parts	
Permits & Code Enforcement		
Personnel Management		
System Administration		
→ Tax		
<ul> <li>Tyler Dashboard</li> </ul>		
eLearning Links Email Settings My Favorites		
My Tyler Community		
Work Orders, Fleet & Facilities Management		

2. Navigate to the web part to add and drag it to a position box. When you save the change, the web part is available in the shared view.

Manage Shared Web Parts		×
Munis SharePoint Dashboard	et.earning Links	
Accounts Payable Accounts Receivable	Left	Right
Budgeting Business Licenses		, agin
MUNIS Workflow		
Permits & Code Enforcement	Show Shared Web Parts Show Personal Web Parts	
System Administration		

See the <u>Web Parts</u> section in this document for more information on managing individual web parts.



## **Central Search**

#### Munis-specific

The Central Search option searches the Munis central programs for records. You can search for records within a specific central program, or you can search for records within all the central programs.

		meitring 👻 🐝	2
BROWSE DASHBOARD PAGE		MENU 🔅 WEB PARTS	[0]
Dashboard - v104 - melfring Tyler Dashboard	Central Search	c	^
EDIT VIEWS Home Payroll	Vendors (0)     Employees (0)		
Korkflow     Edit Favorites     My Envorites	Properties (0)     Customers (0)		
Recent Activity     Application Entry	Contractors (0)     O     Utilities (0)		
Rate Masters MapLink Settings Inspection Entry	Work Orders (0)     Image: Contract of the second sec		
Accounts Parcels Work Orders Utilities	> Invoices (0)		
ApLink Settings Payroll Calendars	<u> </u>		
<ul> <li>Menu Favorites</li> </ul>	Search Refresh Data		

To find records:

- 1. Select the type of record for which you are searching. The default value is All.
- 2. Click **Search**.
- 3. Type the name or number for the record for which you are searching in the Search box.
- 4. Click Search.

The program displays the list of matching records under the categories for which records exist.

5. Click a record to view detail in the associated Munis Central program.



## **Personal Preferences**

The Personal Preferences menu maintains your personal settings and personalizes your home page. Use the preference settings to set default values, clear personal web parts, or apply a template to your personal dashboard.

To open the Personal Preferences menu, click your user name in the header of the Tyler Dashboard home page. Available options on the Personal Preferences menu vary according to your permissions.

	melfring <del>v</del>
My Settings	
Sign Out	
Personalize this Page	
Show Shared View	
Reset Page Content	
Dashboard Profile	
Apply Template	
Clear User-Added Dashboar Content	rd

## **My Settings**

My Settings manages your account details, settings, and personal alerts.

Edit Item   My	Language And Region   My Alerts	
Account	i:0#.w tyler\melfring	
Name	melfring	
E-Mail	melfring@tylertech.com	
Mobile Number		
About Me		
Picture		
Department		
Job Title		
SIP Address	melfring@tylertech.com	
Created at 7/18/201.	3 11:19 AM by  Wintle, Josh 9/2012 11:19 AM by  Wintle, Josh	Close

• Edit Item —Identifies your user ID, email address, job information. It also includes an About Me description or picture, if applicable.



- My Language and Region Settings—Identifies language preferences and the geographic region settings for your dashboard - county, time zone, standard calendar, standard work week and work days. If the Always Follow Web Settings check box is selected, these fields are not accessible.
- My Alerts—Manages alerts for your dashboard.

#### Sign Out

The Sign Out closes the connection from your user ID to the dashboard.

#### **Personalize This Page**

Personalize this Page provides a grid format for reorganizing your dashboard. Use this option to add new SharePoint web parts or drag-and-drop existing web parts to different positions on the page.

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BROWSE DASHBOARD	AGE	ş	🔎 CENTRAL SEARCH 🔠 TYLER MENU 🔯 WEB PARTS 📮
Stop Editing Edit Properties - X Del Manage	sions missions ete Page Share & Track	Title Bar pe Properties Is	
Categories	Parts	About the part	
Apps     Blog     Content Rollup     Forms     Media and Content     Social Collaboration	Image: ConnectionsDetailsV3       Image: ConnectionsDetailsV3         Image: ConnectionsDetailsV3_backup       Image: ConnectionsV3         Image: ConnectionsV3       Image: ConnectionsV3_backup         Image: ConnectionsV3_backup       Image: ConnectionsV3_backup         Image: ConnectionsV3_backup	ConnectionsDetailsV3	ilsV3
Upload a Web Part 🔻		Add part to: Left 🔽	
			Add Cancel
EDIT VIEWS Home Payroll Workflow     Edit Eavorites	A You are editing the Personal Version of this page		
<ul> <li>Eult Pavorites</li> </ul>	Left		Right
Recent Activity	Add a Web f	Yart	Add a Web Part
Rate Masters MapLink Settings Inspection Entry Accounts	eLearning Links Select a Product: Show all		
Parcels Work Orders	Title	Topic	Product
Utilities	CB - 110 Munis Reporting With Excel Cubes	Cubes	MUNIS Other
MapLink Settings	CB - 111 Connecting to an Excel Cube	Cubes	MUNIS Other
Fayron Calendars	DSH - 114 Access eLearning Inrough Your Dashboard	d Dibbon SA Tyler Dashboard	MUNIS Other



## Show Shared View/Show Personal View

Show Shared/Personal Views refreshes your dashboard to display the selected views.

- If your dashboard is currently set to show your personal dashboard, this option is Show Shared View. When you click Show Shared View, the dashboard refreshes to show only the shared views available on your dashboard.
- If your dashboard is currently set to show the shared view, this option is Show Personal View, and when you select it, the dashboard refreshes to display your personal dashboard.

#### **Reset Page Content**

The Reset Page Content option resets added web parts to their shared values and deletes all web parts that you have added.

#### Apply a Template

Apply Templates provides options for viewing and applying templates to your personal dashboard. Templates include predefined programs, web parts, views, or favorites, and when you apply a template to your dashboard, these predefined items become part of your personal dashboard.

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BROWSE DASHBOARD					III TYLER MEN	iu [=
Dashboard - v104 Tyler D	- melfring ashboarc	1				
Home	Apply lemplates	ali 🗸			_	
Pavroll	Category	Name	Created	Description		
Workflow		Human Resources	08/07/2013	Provides HR applications.		
Edit Favorites		Purchasing	08/09/2013	Standard purchasing programs		
My Favorites				1		
<ul> <li>Recent Activity</li> </ul>	K ( 1 2 )	View 🍇 Ap	oply			
Scheduler Queue						
Dequisition Entry						

You can apply multiple templates to your personal dashboards. When you apply more than one template, any duplicate views, web parts, or favorites are merged together so that they are not duplicated on your dashboard. Use the Clear User-Added Dashboard Content option on the Personal Preferences menu to remove all personal templates, web parts, favorites, or views. This clears everything from the dashboard except web parts shared by an administrator.

**Note:** Administrators can create an unlimited number of templates using the Template Administration option on the Dashboard Administration menu.



To apply a template:

- 1. From the Personal Preferences menu, click **Apply Template**.
  - The program displays the Apply Templates pane that lists all of the available templates. Apply Templates: All V



2. To view template details, click the template name or click View.

Human Resources		
V USER VIEWS		
> Home		
> Payroll		
> MY PROGRAMS		

- 3. Click **OK** to return to the Apply Templates pane.
- 4. Select the check boxes for the templates to apply.

	Category	Name	Created	Description
◄		Human Resources	08/07/2013	Provides HR applications.
	<b>e</b>	Purchasing	08/09/2013	Standard purchasing programs

#### 5. Click Apply.

The program displays the Apply dialog box.

Apply	y 🛛 🛛
User	melfring
	Remove all existing user views, personal web parts, and items added to My Programs and My Favorites prior to applying the 1 template(s)?
	Save Cancel

6. Select the Remove check box if all existing user-added content should be removed from your dashboard before applying the templates.



7. Click Save.

The program displays a confirmation message.

- 8. Click **OK** to apply the templates; click **Cancel** to cancel the application of the templates. If you click OK, the program displays a confirmation message when the templates are applied successfully. This message includes a summary of the templates that were applied to your personal dashboard.
- 9. Click **OK**.

#### **Clear User-Added Dashboard Content**

The Clear User-Added Dashboard Content clears all personal web parts, user views, and items added to your dashboard.

Clear Dashboard
Remove all existing user views, personal web parts, and items added to My Programs and My Favorites?
Save

When you select this option, the program displays a confirmation message. To complete the removal process, click **Save**. To cancel the process, click the Back button on your browser to return to your home page.

## **Settings**

Settings manages the overall dashboard display, shared web parts, and user permissions through a site collections page. A site collection is a website that may include subsites, which all share the same owner and administrators.

	melfring 🗸	Ö			
Shared wit	Shared with				
Edit page					
Add an app					
Site contents					
Change the look					
Site settin	gs				
Dashboard	d Administrati	on			



#### **Shared With**

Shared With displays users who currently have permissions to share your personal dashboard.

Shared With	×
Name	^
Name	~
INVITE PEOPLE EMAIL EVERYONE ADVANCED	
	Close

The Invite People option allows you to invite shared users to contribute to the dashboard; the Email Everyone option creates an email message preaddressed to your shared contacts. Click **Advanced** to view the shared users and associated permission levels.

#### **Edit Page**

Edit Page provides the SharePoint view for adding or removing SharePoint web parts.

						nelfring 🗸 🤷 🥸	?
BROWSE	DASHBOARD PAGE				CENTRAL SEARCH	🕼 WEB PARTS	[0]
Stop Editing * Edit	Edit Properties - X Delete Page Manage	E-mail a Alert Link Alert Me - Share & Track App	ve Reject Workflows	Edit Mobile Page + Page Actions			
/ EDIT	VIEWS						^
Home Payroll Workflow		Left			Right		
🖍 Edit F	avorites			Add a Web Part	Add a Web Part		
▼ My Far	vorites						
Roles Accour	nt Master						



## Add an App

Add an App is a SharePoint feature that provides the option for adding apps to your dashboard. The default options are Document Library, Custom List, or Tasks.



If other apps are available to your organization, use the Search feature to find and download these apps. System administration personnel can add apps that are available to all users.

#### Site Contents

Site Contents is a SharePoint feature that provides a page layout view for your dashboard application. This view displays the lists, document libraries, and apps for your site. This option is only available to users with Site Collection Administration permissions.





#### Change the Look

Change the Look provides templates for color and style changes that apply to your personal dashboard. There are several predefined options available.



#### Site Settings

The Site Settings page manages the overall dashboard display, shared web parts, and user permissions through a site collections page. A site collection is a website that may include subsites, which all share the same owner and administrators.

**Caution!** Dashboard administration procedures should only be completed by system administration personnel.





#### Adding a Group

When you add a user or a group of users using this method, those users are automatically assigned to the Dashboard Members SharePoint group, which has Contribute level permissions. To add administrative users or users with more complex permissions, see the Add a User or Group with Full or Limited Permissions task. In order for SharePoint to recognize the user or group that you are adding, the user or group must exist on the local network account.

To add a user or group with contribute permissions:

1. On the Site Settings page, click **People and Groups** under Users and Permissions. The program displays the People and Groups page.

				melfring - 🌞 ?	
BROWSE DASHBOARD				🔎 CENTRAL SEARCH 🔠 TYLER MENU 🛛	
Dashboard - vt0 Tyler [	Dashboard ©			Â	
Groups	New  Actions  Settings			View: Detail View -	
Dashboard - v104 - melfring Members	🛄 🖉 🗐 Name	About Me	Job Title	Department	
Dashboard - v104 - melfring Visitors	josh.wintle				
Dashboard - v104 - melfring Owners					

2. Click New.

					melfring <del>v</del>	ö	?
BROWSE DASHBOARD					III TYLER M	ENU	
Groups	4 - melfring Dashboard ()			View	v. Dotail View		^
Dashboard - v104 - melfring Members	Add Users	About Me	Job Title	Department			
Dashboard - v104 - melfring Visitors Dashboard - v104 - melfring Owners	Add users to this group.						

#### 3. Click **Add User**. The program displays the Grant Permissions box.

Share 'Dashboard - v104 - melfring'		×
Add people to the Dashboard - v104 - melfring Members group		
Enter names, email addresses, or 'Everyone'.		
	Share	Cancel

 Enter the user or group name in the Users/Groups box. For example, type tyler\munisusers. To enter more than one user or group, separate the names using a semi-colon.



5. Verify that you entered the user or group name correctly.

Share 'Dashboard - v104 - melfring'				
Add people to the Dashboard - v104 -	melfring Member	rs group	^	
todd.boldud				
Bolduc, Todd Implementation Documentation Analyst	$\hat{}$	Share	Cancel	
Showing 1 result	•		¥	

6. Click Share.

To add a user or group with full or limited permissions

1. On the Site Settings page, under Users and Permissions, click **Site Permissions** to display the Permissions page, and then click the Permissions tab.

				melfring 👻 🤬	2
BROWSE DASHBOARD P	PERMISSIONS			III TYLER MENU	
Dashboard - Tyler	v104 - melfring Dashboard ©				
EDIT VIEWS	Name	Туре	Permission Levels		
Home	Name	User	Full Control		
Payroll Workflow	Dashboard - v104 - melfring Members	SharePoint Group	Contribute		
🖍 Edit Favorites	Dashboard - v104 - melfring Owners	SharePoint Group	Full Control		
<ul> <li>My Favorites</li> </ul>	Dashboard - v104 - melfring Visitors	SharePoint	Read		
Recent Activity		Group			

#### The Permission ribbon expands.

BROWSE	DASH	IBOARD	PERMISSIONS			
Grant Permissions	Create Group	Edit User Permission	Remove User Permissions	Check Permissions	Permission Levels Site Collection Administrators	
Grant	t	N	lodify	Check	Manage	



2. In the Grant group on the ribbon, click **Grant Permissions**. The program displays the Grant Permissions dialog box.



- 3. In the Contribute box, type the domain name, user, or group name. For example, type tyler\munisusers. To include more than one user or group, separate the names with a semi-colon.
- 4. Click **Show Options** to display the Group/Permission Level list.

Share 'Dashboard - v104 - melfring'			
~			
Share Cancel			

- 5. Select the applicable group or permission level.
- 6. Click Share.



#### **Configuring Regional Settings**

To maintain regional settings for your organization:

1. On the Site Settings page, under Site Administration, click **Regional Settings**. The program displays the Regional Settings page.

			melfring 👻 🤹	* 3
BROWSE DASHBOARD		₽ CENTRAL SEARCE	H 🔠 TYLER MENL	j (
Dashboard - v104 Tyler D	)ashboard ©			
EDIT VIEWS Home Payroll Workflow	Time Zone Time Zone Specify the standard time zone.	Time zone: (UTC-05:00) Eastern Time (US and Canada)		
Edit Favorites	Region			
My Favorites	Locale			
<ul> <li>Recent Activity</li> </ul>	Select a locale from the list to specify the way the site displays numbers, dates, and time.	Locale: English (United States)		
Scheduler Queue Requisition Entry Workflow Central Work Order Central	Sort Order Specify the sort order.	Sort order: General		
Contractor Central Time Entry Rules Time Entry Employee Pending Time Entry	Set Your Calendar Specify the type of calendar.	Calendar: Gregorian		
<ul> <li>Menu Favorites</li> <li>System Update</li> <li>Employee Job/Salary</li> </ul>	Enable An Alternate Calendar Specify a secondary calendar that provides extra information on the calendar features. Define Your Work Week	Alternate Calendar:		
Employee Master Records Vendor Maintenance Personnel Settings MUNIS Print Spool Functions	Select which days comprise your work week and select the first day of each work week.	Sun       ☑ Mon       ☑ Tue       ☑ Wed       ☑ Thu       ☑ Fri       Sat         First day of week:       Sunday       ☑       Start time:       8:00 AM       ☑         First week of year:       Starts on Jan 1       ☑       End time:       5:00 PM       ☑		
Employee Deductions	Time Format Specify whether you want to use 12-hour time format or 24-hour format.	Time format: 12 Hour	or C	
			Col	

2. Update the settings, as required, and click **OK**.



#### Maintaining Site Collection Administrators

Site collection administrators have full control over all websites in the site collection. To add or update site collection administrators:

1. On the Site Settings page, under Users and Permissions, click **Site Collection Administrators**.

The program	displays the Site C	Collection Administrators page.		
		n	elfring 👻 🧔	k 1
BROWSE DASHBOARD			TYLER MENU	1
Dashboard Tyler	- v104 - melfring Dashboard © Site Collection Administrators			
Home Payroll Workflow	Site Collection Administrators are given full control over all Web sites in the site collection. They may also receive site use confirmation mail. Enter users			
Edit Favorites	separated by semicolons.			
My Favorites				
<ul> <li>Recent Activity</li> <li>Scheduler Queue</li> </ul>		OK Cancel		

- 2. Add the appropriate names; as you add a name, the program displays the user details for verification. To add multiple names, use a semi-colon between each.
- 3. Click OK.

Note: Site collection administrators have full control over all websites in the site collection.

#### **Restricting Access to Microsoft SharePoint Settings**

The Dashboard Members group is automatically assigned to users added using the People and Groups page. This SharePoint group has contribute permissions and since users other than your system administrators should not have access to the SharePoint Settings page, you must change the contribute permissions to restrict general access to the SharePoint Settings pages.

To restrict access to the Settings pages:

- 1. On the Site Settings page, under Users and Permissions, click **Site Permissions**. The program displays the Permissions page.
- 2. Click **Permissions** on the ribbon to display permission options.

									-
BROWSE DASH	BOARD PERMISSIONS						₽ CENTRAL SEARCH	H	[1]
Grant Create Permissions Group	Edit User Permissions Permissions	Check Permissions	Permission Levels Site Collection Administrators						
Grant	Modify	Check	Manage						
<ul> <li>EDIT VIEWS</li> </ul>		<ul> <li>Name</li> <li>Dana S</li> </ul>	taples		Type User	Permission Levels Full Control			
Payroll Workflow		Dashbo	oard - v104 - melfring Member	5	SharePoint Group	Contribute			
🖍 Edit Favorite	5	Dashbo	oard - v104 - melfring Owners		SharePoint Group	Full Control			
<ul> <li>My Favorites</li> </ul>		Dashbo	Dashboard - v104 - melfring Visitors		SharePoint Group	Read			
Recent Activit	У				Group				

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- 3. From the Manage group on the ribbon, click **Permission Levels**. The program displays the Permission Levels page.
- 4. Select the Contribute check box.
- 5. Select Delete Selected Permission Levels.

#### **Dashboard Administration**

The Dashboard Administration option provides dashboard management for system administration personnel.

Connections	Edit Dashboard connections
Site Configuration	Edit Dashboard site configuration
Dashboard Exceptions	View Dashboard exceptions
Template Administration	Manage Dashboard templates
Dashboard Notifications	Schedule Dashboard notifications
Troubleshooting	Troubleshoot Dashboard problems

#### **Connections**

Connections provides the Dashboard Services page that maintains the connection between the Tyler Dashboard and the web services for the Tyler applications with which the dashboard connects.

Dashboard Servic Manage Connections:	Dashboard V		Add Connectio
Tenant	Name	Active	Duplicate Delete
Dashboard	Dashboard_Default		Ē 🗱

To view the connections that are available for different Tyler applications, use the Manage Connections list and select the application for which to view connections. The default value for this list is Dashboard.

To create a new connection based on the active connection, click **Duplicate**. To remove a connection, click **Delete**.

The Tyler Dashboard allows only one connection per application to be active at any one time. The Active check box is selected for the active service.



Once you select an application, click the service name to view or edit the service details, or click **Add Connection** to create a new connection.

Dashboard Services		
Update Connection	×.	
Name: Dashboard_Default	Dashboard Services	
Tenant: Dashboard Active: 🗹	Add Connection	X
Tyler Community Services REST API Base Unt [http://tylercommunity.tylerlach.com/api asht	Name:	
	Tyler Community Services           REST API Base UH	Save

The Dashboard Services option is only available to users with appropriate permissions.

#### Dashboard Site Configuration

Dashboard Site Configuration manages configuration settings for the Tyler Dashboard.

Title:	Tyler Dashboard	
Initial Postback Delay:	200	
Street:		
City:		
State:		
Zip Code:		

Use this option to establish menu and default site options:

- Title—Provides the text that displays in the dashboard banner
- Initial Postback Delay— Specifies the initial delay, in milliseconds, the postback waits before rendering.
- Street/City/State/Zip Code—Provide the address for the location used to center the initial pin drop in mapping web parts.

The Dashboard Configuration option is only available to users with appropriate permissions.



#### **Dashboard Exceptions**

The Dashboard Exceptions page displays a list of exceptions (errors) encountered by the Tyler Dashboard. The program displays the time of the exception, as well as the username of the person who encountered the exception and a description of the exception.

yler 🎸	Dashboard - I	Exceptions			
					?
Dashboai	rd Exceptions			Back to Pr	revious page
Exception	Date:	Wednesday, August 21, 2013			
Time 2:07 PM	<mark>User</mark> i:0#.w tyler\melfring	Exce Get Page Web Parts Failed: 400 : Bad Re	ption quest	View A	E-mail

Use the calendar button to view exceptions for a specific date.

The Exceptions page displays exceptions by date, with the current date as the default date. To view exceptions for a different date, click the calendar button and select the date. If enabled, click the email button to attach the exception record to an email message.

The Dashboard Exceptions page is only available to users with appropriate permissions.

#### Template Administration

Template Administration provides system administrators the option of creating standardized dashboards that users can then apply to their personal dashboards. Templates can include favorites, defined views, and web parts. Administrators can create an unlimited number of templates and users can apply multiple templates to their personal dashboards.

If a user applies more than one template, any duplicate views, web parts, or favorites are merged so that they are not duplicated on the user's dashboard. Users can remove all personal templates and additional web parts, favorites, or views from their dashboards, but they cannot remove the shared web parts managed by the administrator.

The Template Administration option is only available to users with appropriate permissions.

To create a template, build a dashboard that contains the user views and web parts that should be provided in the template. Once the dashboard is set, use the Template Administration option on



Manage Templates: All 🗸 👍 Add 🔜 Import Category Name Created Description Actions 8 Human Resources 08/07/2013 Provides HR applications. 08/09/2013 Standard purchasing programs Purchasing 🗈 View 🍇 Apply 🗟 Export 🗱 Delete 1 2 >> < <

the Dashboard Administration menu to display the Manage Templates screen.

To add the template:

1. Click **Add** in the Manage Templates banner. The program displays the Add dialog box.

Add		×
Name		
Category		•
Description		
From User	melfring	•
Replace	existing if named the same?	Save Cancel

- 2. Type the name of the template in the Name box.
- 3. Select the category for the template from the Category list.
- 4. Type a description of the template in the Description box.
- 5. Select the user whose dashboard is the model for the template from the From User list.
- 6. Select the Replace Existing if Named the Same check box if the template is replacing an existing template of the same name.
- 7. Click **Save**. The program displays a confirmation message that the template saved successfully.
- 8. Click OK.

Note: Only system administrators have permissions to create templates.



Once you create templates, users can add them to their personal dashboards using the Apply Templates option on the Personal Preferences menu.

To maintain a template, select the template or templates from the Manage Templates list and then select the applicable option.

Mana	ge Templa	ites: All 🗸			🖧 Add	🔜 Import
	Category	Name	Created	Description	🔽 Update	ctions
		Human Resources	08/07/2013	Provides HR applications.	Duplicate	
		Purchasing	08/09/2013	Standard purchasing programs	🗯 Delete	
I 2 >> I E View Apply E Export S Delete						

To export a template:

1. Select the check box for the template to export.

Mana	Manage Templates: All 🗸 🖓 Add					
	Category	Name	Created	Description	Actions	
✓		Human Resources	08/07/2013	Provides HR applications.		
		Purchasing	08/09/2013	Standard purchasing programs		
<b>K</b> <	I 2 >> I E View Apply  Export State					

- 2. Click **Export**.
- 3. Navigate to the location to save the file.
- 4. Type a name for the file in the File Name box.
- 5. Click Save.

The program displays a confirmation message when the template is exported successfully.

6. Click **OK**.

**Note:** Templates are exported as a single XML file.

To import a template:

1. Click Import.

Mana	Manage Templates: All 🗸 🖞 Add					
	Category	Name	Created	Description	Actions	
	-	Human Resources	08/07/2013	Provides HR applications.		
	<b>e</b>	Purchasing	08/09/2013	Standard purchasing programs		
<<	I 2 >>I Export Delete					



- 2. Navigate to the XML file that contains the template or templates to import.
- 3. Click **Open**. The program displays the Import dialog box. This dialog box lists the templates that are included in the file.
- 4. Select the check boxes for the templates to import.
- 5. Click **View** to view the contents of the selected template.
- 6. Select the Replace Existing if Named the Same check box, if applicable.
- Click Save to process the import; click Cancel to cancel the import. If you click Save, the program displays a confirmation message when the templates are imported successfully.
- 8. Click OK.

To view template contents:

1. From the Manage Templates list, select the template to view and click View.

Mana	ige Templa	ates: All 🗸		Add Carlos Ca	d 🛃 Import	
	Category	Name	Created	Description	Actions	
	-	Human Resources	08/07/2013	Provides HR applications.		
		Purchasing	08/09/2013	Standard purchasing programs		
< <	1 2 >>> Export Delete					

The program displays a list of views, web parts, and favorites included in the template.

Apply	Templates:	All 🗸				
	Name Create Date Description Category Content	HR Manager 10/27/2011 10:51 AM This is a template for the manager of Human Resources Human Resources				
		▼ USER VIEWS	^			
		✓ Employees				
		WEB PARTS				
		MY FAVORITES				
		✓ Home				
		▼ WEB PARTS				
		My Favorites				
		My Workflow				
		✓ MY FAVORITES				
		Roles				
		Tyler Technologies Web site				
		▼ MY PROGRAMS				
		✓ Other Applications				
		Central Administration	~			
		Maddau Ossansad Ossa				
K	1 2 3 📏	Return Reg Apply				

2. Click Return.



To view the contents for multiple templates at one time:

- 1. Select the check boxes for the templates to view.
- 2. Click View.

The program displays the View Contents window.

Human Resources		
USER VIEWS		
MY PROGRAMS		
Purchasing		
USER VIEWS		
MY PROGRAMS		

- 3. For each template, click **User Views** to see the views and web parts included in the template, or click **My Programs** to view a list of favorites saved to the Programs tab for the template.
- 4. Click **OK** to return to the Manage Templates pane.

#### Dashboard Notifications

The Dashboard Notifications page manages notices that display to all dashboard users. When you click Add Item, the program displays a dialog box that provides the Priority, Title, Body (text of the message) and Display Duration fields.

			melfring 👻 🤻	\$ ?
BROWSE DASHBOARD		₽ CENTRAL SEARCH	III TYLER MENU	J [2]
Dashboard - v104 - Tyler Da	ashboard			
EDIT VIEWS Home Payroll Workflow	Dashboard Notifications Schedule Items: All	Add It	em	
Edit Favorites				

Complete these settings to define the message. When you click Save, the Dashboard Notifications page refreshes to include the scheduled item. The notification displays directly under the dashboard ribbon on users' personal dashboards for the defined timeframe.

Use the Schedule Items list to filter the notifications that display.



Notifications are highlighted with the color associated with the notification priority:

- Red Very Important
- Yellow Important
- Green Success
- Blue/Gray Informational

Update Item					X								
Priority:	Very Important												
Title:	Service Outage												
Body:	There will be a service inter a.m. to 7 a.m.	ruption on Friday, September 2	27, from 6										
Display Duration:	08/19/2013 12:00 am to	9/26/2013 12:00 AM		Save	Cancel								
Dashboard Schedule Ite	d Notifications ms: All	>				Add	Item						
						_							
Priority T	Title Body		Start E	End Dup	olicate De	lete 🎼							
Priority T	Body           Gervice         There will be a service from 6 a.m. to 7 a.m.	interruption on Friday, September 27,	Start         E           8/19/2013         9	End Dup 0/26/2013	De De	lete 💱							
Priority T	Body           Service         There will be a service i from 6 a.m. to 7 a.m.	interruption on Friday, September 27,	Start E	End Dup //26/2013	olicate De	lete 💱					melfring <del>•</del>	¢	
	Title Body Bervice There will be a service from 6 a.m. to 7 a.m. BROWSE DASHBDARD PAGE	interruption on Friday, September 27,	Start E	End Dup 1/26/2013	olicate De	lete 🖓		Q	CENTRAL SEARCH	Tyler Menu	melfring <del>-</del>	<b>Ö</b> VARTS	1
	Body           Bende         There will be a service from 6 a.m. to 7 a.m.           BROWSE         DASHBOARD           PAGE         Dashboard - v104 - Tyler Dage	interruption on Friday, September 27, mettring ashboard	Start E 8/19/2013 9	End Dup 1/26/2013	viicate De	lete 🖓		Q	CENTRAL SEARCH	III TYLER MENU	melfring –	<b>Ö</b> VARTS	

On the dashboard, users click Close to hide the notification; however, if they close and open the dashboard, the notification displays again.



#### Troubleshooting

Troubleshooting provides a predefined list of items from which you can select and view applicable diagnostic details.

Diagnostic Utilities	<ul> <li>Web Services (show a list of missing web services for this client)</li> </ul>
	<ul> <li>Web Service Handlers (verify all web services and handlers for this client)</li> </ul>
	<ul> <li>Environment Variables</li> <li>(display a complete list of server specific environment variables)</li> </ul>
	<ul> <li>Work Flow Services (specifically test various work flow services)</li> </ul>
	<ul> <li>Munis Menu Services (specifically test various Munis Menu services)</li> </ul>
	○ Dashboard Version (displays the current dashboard version)

Select an item and then click Submit to view a report on-screen. For example, select Web Services to view a list of web service errors.

Verify Web Ser Module ID	rvices Service Name	Missing Web Services	Back to Diagnostics
TX	sendMessage	Service Not Found	
		Show All Services Re-Check	

Use the Dashboard Version option to view your current dashboard version identifier.





## **Web Part Actions**

Once you have added web parts to your dashboard, the Edit My Web Part option for each web part provides the individual settings.

el earning Links			<b>→</b> -
		1	Minimize
Select a Product: Show all		(	Close
Title	Topic		dit My Web Part
CB - 110 Munis Reporting With Excel Cubes	Cubes	- V	
CB - 111 Connecting to an Excel Cube	Cubes		
DSH - 114 Access eLearning Through Your Dashboard	SA Tyler Dashbo	ard	MUNIS Other

# Some web parts include the Settings button in the web part footer. This button also displays the web part settings.

Work	Flow Manager				
w	ork Flow By Process Wo	ork Flow By	Approvers	Charts & Graph	IS
Compa	arison Date: Wednesday, August 2	28, 2013	Th	nis Day Last Week 🔽	
Code	Description	Pending	Oldest Pending	Avg Approval Time	Avg Rejection Time
API	AP Invoice approvals	2 🕇	4/27/2007 😑	0 min	0 min
ATA	Job Opening Applicant Hire	0		0 min	0 min
ATF	Job Openings Hiring Freeze	0		0 min	0 min
ATN	Job Openings	0 🕇		0 min	0 min
BGA	Budget Amendment Approvals	0		0 min	0 min
K K	1 2 3 4 <b>&gt; &gt;</b>				
<del>6</del> 6	) 🚱 🔎 🔹 Updated: 9/4/2013 7:2	24 AM			



On the Personal View page, the Settings pane provides parameters specific to the selected web part.

			Work Flow Manager
			Work Flow Manager - Settings
		Right	Tool Bar Settings
Add a	Web Part	Add a Web Part	Show the ToolBar:  Yes ONO Allow Detail Viewer: Yes No
/y Workflow		My Favorites	Allow Auto Update:
Notifications	44 (44 Unread)		Auto Update Interval: 30 (in minutes)
C Approvale	22 (20 Uprood)	Work Flow Manager	Work Flow Manager Options
Alerts		🚱 🥝 🚱 🔎 🄹 Updated: 9/4/2013 8:07 АМ	Defaults Use Email Templates:  Show Queued Approvals:  Days Used for Averages:  365 Default Chart Type: Column Chart Default Chart Dimension:  Two Default Process Code:  AP Invoice approvals Default Charting Point:  Total Approved Thresholds
			- Fair (Yellow Light): 15 to 25 Fia     - Poor (Red Light): Greater than 25 Fia     Appearance
+ Settings	Forwarding On		Title Work Flow Manager
Dpen Payrolls 69 🥝 🖓 🔎 🔹 Updatect 9/4/2013 &00	7 AM		Height Should the Web Part have a fixed height? Yes No. Adjust height to fit zone. Width Should the Web Part have a fixed width?
			Ves Pixels  No. Adjust width to fit zone.  Chrome State Minimized
			Normal     Chrome Type     Default
			Layout

Once you have selected the settings, click **Apply**.

**Caution!** Tyler Technologies personnel recommend that individual users only make changes to settings specific to the web part or the general toolbar settings.



# **Tyler Dashboard Web Parts**

The Tyler Dashboard includes the eLearning Links, Email Settings, My Favorites, and My Tyler Community web parts.

## eLearning Links

eLearning tutorials, which are available on the Munis KnowledgeBase, provide interactive training for Tyler and Munis products. The eLearning Links web part provides access to eLearning tutorials directly from the Tyler Dashboard.

eLearning Links		• 🗆
Title	Topic	Product
CB - 110 Munis Reporting With Excel Cubes	Cubes	MUNIS Other
CB - 111 Connecting to an Excel Cube	Cubes	MUNIS Other
DSH - 114 Access eLearning Through Your Dashboard	SA Tyler Dashboard	MUNIS Other
DSH - 114 Using the Community Through the Dashboard Ribbon	SA Tyler Dashboard	MUNIS Other
DSH - 116 Set Your Community Identity in the Dashboard	SA Tyler Dashboard	MUNIS Other
<b>K &lt; II 2 3 4 → X</b>		

Before adding this web part, you must ensure that the KnowledgeBase Information box for the Munis Tenant is completed on the Dashboard Services page. System administration should complete this value when they establish your dashboard connections; if this value has not been entered, contact your system administrator.



Once you have added the eLearning Links web part, click the eLearning title to open the tutorial in a new window.



## **Email Settings**

The Email Settings web part configures the settings for sending emails from pages or web parts that have the email button enabled, such as the Dashboard Exceptions page.

Email Settings			
E-mail Settings			
Port No:	25		
User ID:			
Password:			
SMTP Server:			
Default Addresses			
Send To:			
Return Address:			
		Update	
·			



Once you have made all of the necessary changes, click **Update**.

Field	Description
Email Settings	
Port No	This box identifies the SMTP port number being used on the server.
User ID	This box provides the user ID used to log on to the outgoing mail server.
Password	This box provides the password for the user ID.
SMTP Server	This box identifies the address of the SMTP server.
Default Address	ses
Send To	This box specifies the default contact person to whom email is sent for some
	web parts, such as the Exception Viewer.
Return Address	This box provides the default return email address for sent email.

## **My Favorites**

The My Favorites web part stores links to frequently used websites, Tyler Dashboard views, or Tyler application programs.

Google	🛛 🗶 🗶
Roles	<b>2</b> ×

When you are viewing favorites as a list, click **Tile View** to view favorites as buttons; when you are viewing favorites as buttons, click **List View** to view favorites as a list. Click the edit button to change the settings for a favorite or click the delete button to remove a favorite.

To add a Tyler menu item favorite:

1. With the My Favorites web part open in the current view, navigate to the program to add on the Tyler menu.



#### 2. Right-click the program name.

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BROWSE DASHBOARD PAGE	P CENT	RAL SEARCH	U 🔅 WEB P	ARTS		
Dashboard - v104 - melfring Tyler Dashbo	oard	_				
EDIT VIEWS	Tyler Menu	<b>.</b>				
Home Payroll		My Favorites				
Workflow	4 Munis	Google		2	×	
Edit Eavorites	<ul> <li>Financials</li> </ul>	Roles			*	
> Eult Pavontes	General Ledger Menu	1000			~	
<ul> <li>My Favorites</li> </ul>	Set Up/Chart of Accounts	Tile Meur Adel Liele				
Google	General Ledger Settings	The view Add Link				
Roles	Chart Manager					
	Droject Master					
<ul> <li>Recent Activity</li> </ul>	Account Master					
Territor Folia	Chart of Accounts List					
Account Mactor	Account Mass Creation					
Chart Manager	Account Mass Change/Reset					
Chart of Accounts List	Due to/ Due From Setun					
General Ledger Settings	Run this Link ount Codes					
Chart of Account	Add to My Programs					
Segments	Add to My Favorites tes					
System Update	Journal Source Maintenance					
Message of the Day	Site Specific					
Roles	Account Import					
User Defined Fields	Account Merge					
h Monu Envoritor	General Ledger Data Integrity Assistant					

- 3. Select Add to My Favorites.
- 4. Refresh your Tyler Dashboard page. **Note:** Program favorites are listed alphabetically.

To add a view or website favorite:

1. Click Add Link on the My Favorites web part.

Google	Z	×
Roles	2	×



The program displays the Add a New Link fields.

Name Url Startup O	ptions		
Туре	<ul> <li>Url</li> <li>View</li> <li>Tyler Prog</li> </ul>	Open In	New Window Same Window
			OK Cancel

- 2. Type the Name and URL in the boxes.
- 3. If you are adding a website, select URL under Type; if you are adding a favorite view, select View as the type option.
- 4. Select New Window or Same Window under Open In.
- 5. Click OK.

**Note:** Favorites are listed in the order in which they were added.



## **My Tyler Community Web Part**

The My Tyler Community web part provides direct access to specific areas of Tyler Community (for example, Forums or Wikis).

Prior to adding the My Tyler community web part, you must complete the Identity process to generate an API key. See the <u>Tyler Community</u> section of this document for more information on generating and applying the key. Once you have enabled your Tyler Community connection, see <u>Web Parts</u> for details on adding a web part.

Because there are multiple facets to the Tyler Community application, you may add the Tyler Community web part multiple times, and then customize each entry to provide access to a specific area of the community. Otherwise, you can edit the web part to update the focus, as needed.

To customize the web part, click the Edit My Web Part option for each web part and then select the Tyler Community Item to establish as the focus for the web part.

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Isplay: Search							
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orum web part defaults:							
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fool Bar Settings	No search results found	4 My Tyler Community New Post	×				
Show the ToolBar:   Yes   No		Customize My Tyler Community	2				
Ulow Detail Viewer:   Yes   No	🚯 🚱 😋 🔎 🌺 Updated: 8/21/2013 2:39 PM	Display:					
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Auto Update Interval: 30 (in minutes)		Groups					
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		Show the ToolBar:   Yes   No		Save			
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		Auto Update Status: O On  Off					
		Auto Update Interval: 30 (in minutes)					
		Appearance					
		Title					
		My Tyler Community New Post					