



Tyler Dashboard

*User Guide
Version 6.2*

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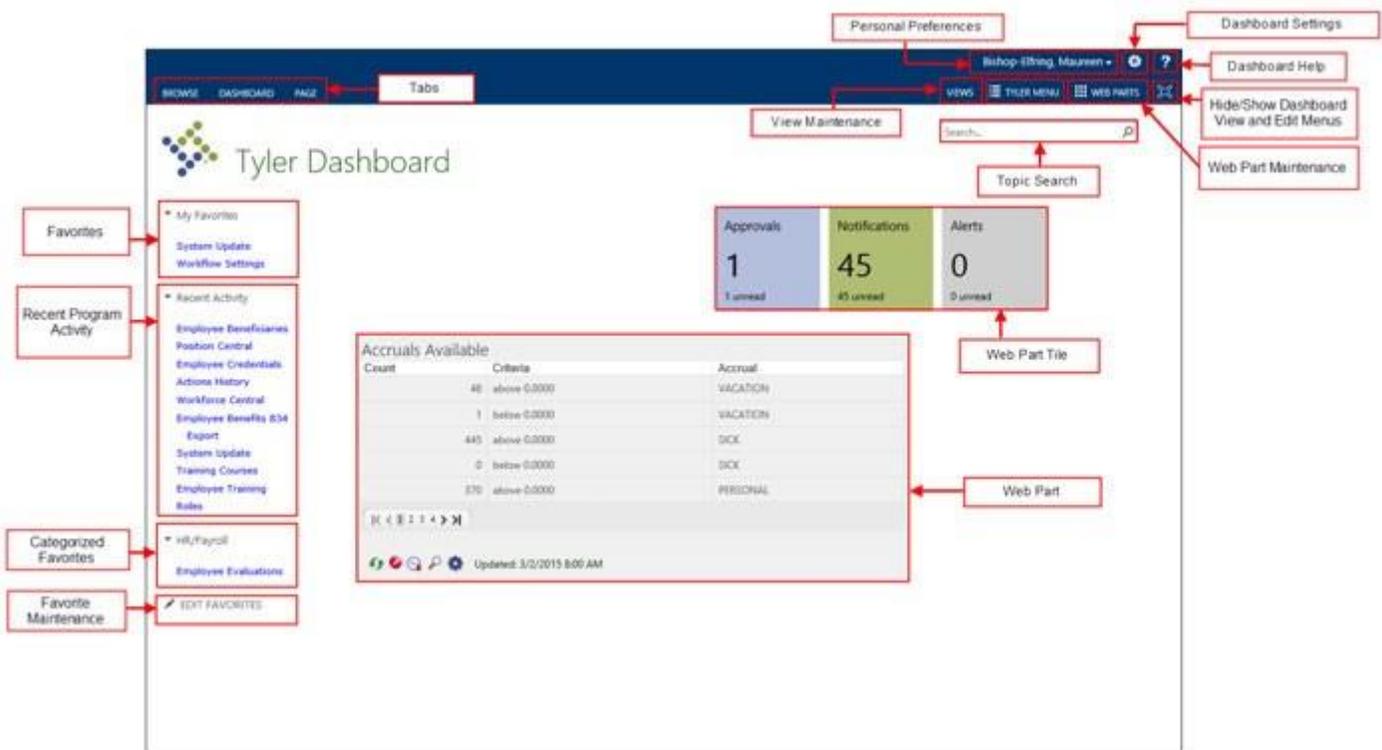
Tyler Dashboard

The Tyler® 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 My Favorites list provides easy access to those programs you use most often. The work/display area of the Dashboard displays selected web parts.



Site Search

On the home page, the Search box provides an integrated search tool for the Tyler Dashboard. When you use this option, the search results include records stored in your Tyler menu programs, web parts, and Tyler Community. With additional SharePoint setup, this search feature also searches items stored in your organization's SharePoint directories.

When you use the Site Search option on the main page, the results are sorted into categories and indicate the number of items identified for the defined search areas (Tyler Community, SharePoint and so on). The Menu results indicate the number of matching results associated with your Tyler menu items.



To change the sort order, click **Sort By** or **Sort Direction** to display the sort options.

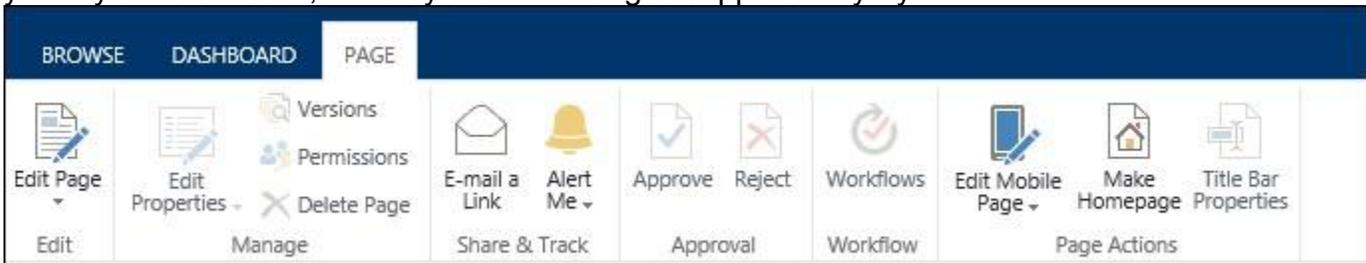


Browse

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

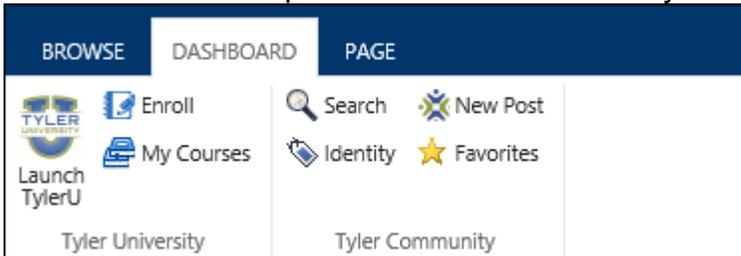
The Page tab provides direct access to Microsoft® SharePoint® features. These features are specific to Microsoft SharePoint. When you make changes using these options, they will affect your Tyler Dashboard, but they are not changes supported by Tyler.



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.



Tyler Community

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

Views

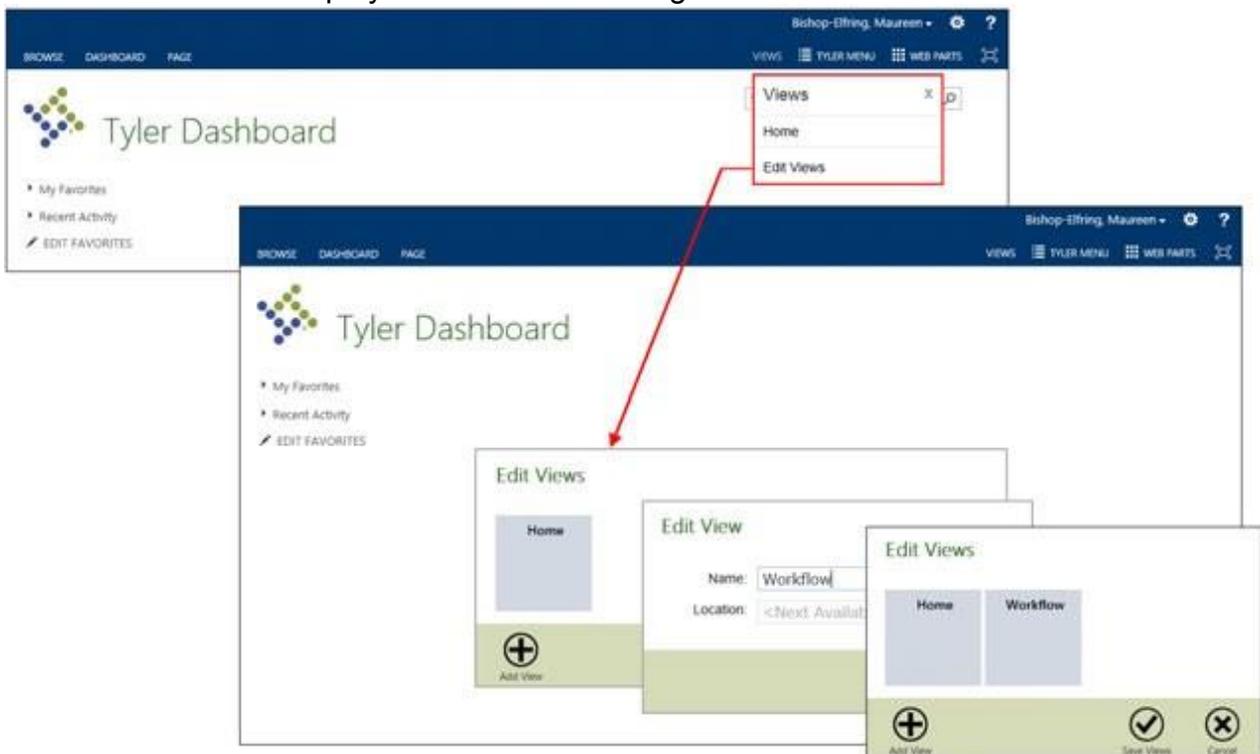
Views are personal dashboard views that you create to match your work requirements. For example, if you often access payroll programs, you could create a view that includes web parts and program favorites specific to payroll processing.

The Home view is the default view for the Dashboard. When you click the Tyler logo from your user-defined views, the Dashboard returns to the Home view. You cannot delete or modify the settings for the Home view.



To create a view:

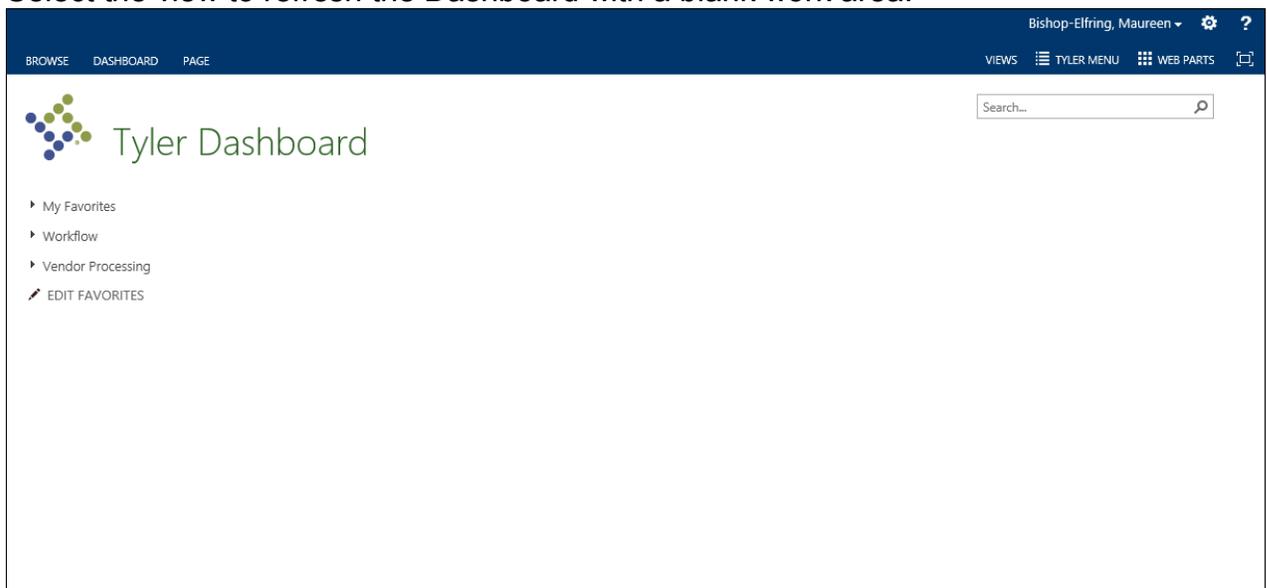
1. Click **Views** in the Dashboard header.
2. Click **Edit Views** to display the Edit Views dialog box.



3. Click **Add View**.
4. In the Edit View dialog box, enter the name of the view in the Name box.
The default value for the Location box is Next Available and you cannot change this.
5. Click **Save View** to save the view and return to the Edit Views dialog box.
6. Add additional views, as applicable.
7. Click **Save Views**.
The program refreshes the Dashboard to include the added views on the Views menu.



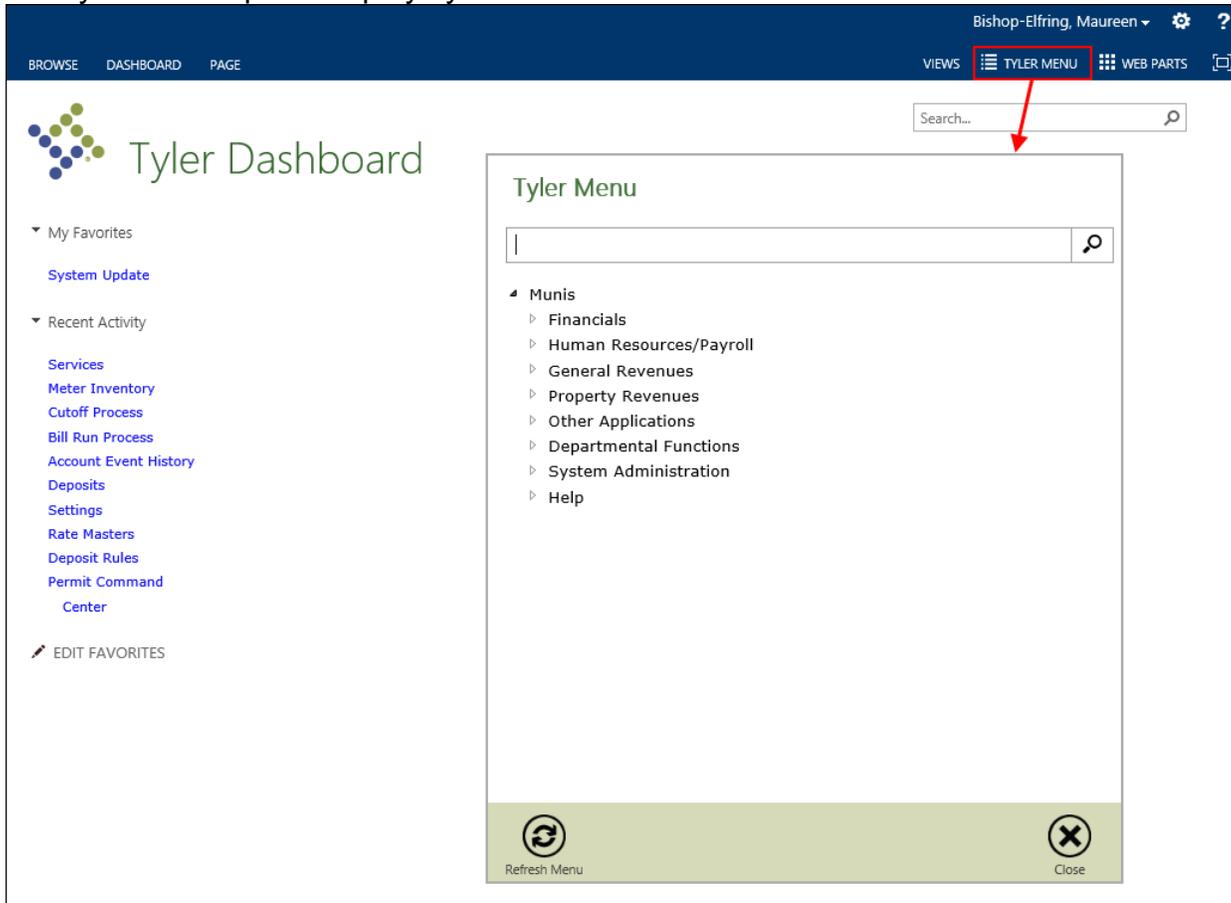
8. Select the view to refresh the Dashboard with a blank work area.



9. With this view active, add the appropriate web parts and favorites to complete the view.
10. To return to the Home view, click the Tyler logo or select Home from the Views menu.

Tyler Menu

To display the menu, click **Tyler Menu** in the header. For example, if you use the Munis product, the Tyler Menu option displays your Munis menu.



When you complete a search from the Tyler menu, results for multiple instances of the same program are summarized. For example, if there are two instances of an identical Employee Master program on your Tyler menu, the search results display Employee Master (2). For programs with identical names that are not identical programs, the search results display the name for each program.



Tyler University Tyler Community

My Favorites

[System Update](#)
[Workflow Settings](#)

Recent Activity

[Exception Builder](#)
[Payroll Calendars](#)
[Employee Central](#)
[Employee Job/Salary](#)
[Employee Deductions](#)
[Employee Master](#)
[Roles](#)
[Employee Beneficiaries](#)
[Position Central](#)
[Employee Credentials](#)

HR/Payroll

[Employee Evaluations](#)[EDIT FAVORITES](#)

Tyler Menu

Employee Master 🔍

- Search ("Employee Master")
 - Projection Employee Master (3)
 - Employee Master (2) ←
 - Terminated Employee Master
 - Civil Service Employee Master
 - Pension Employee Master
- Munis
 - Financials
 - Human Resources/Payroll
 - General Revenues
 - Payment Processing
 - Accounts Receivable
 - Animal Licenses
 - General Billing
 - Parking Tickets
 - Slip Reservations
 - Vehicle Stickers
 - Virginia State Income Tax
 - Maine Vehicle Registration
 - Property Revenues



Refresh Menu



Close

Favorites

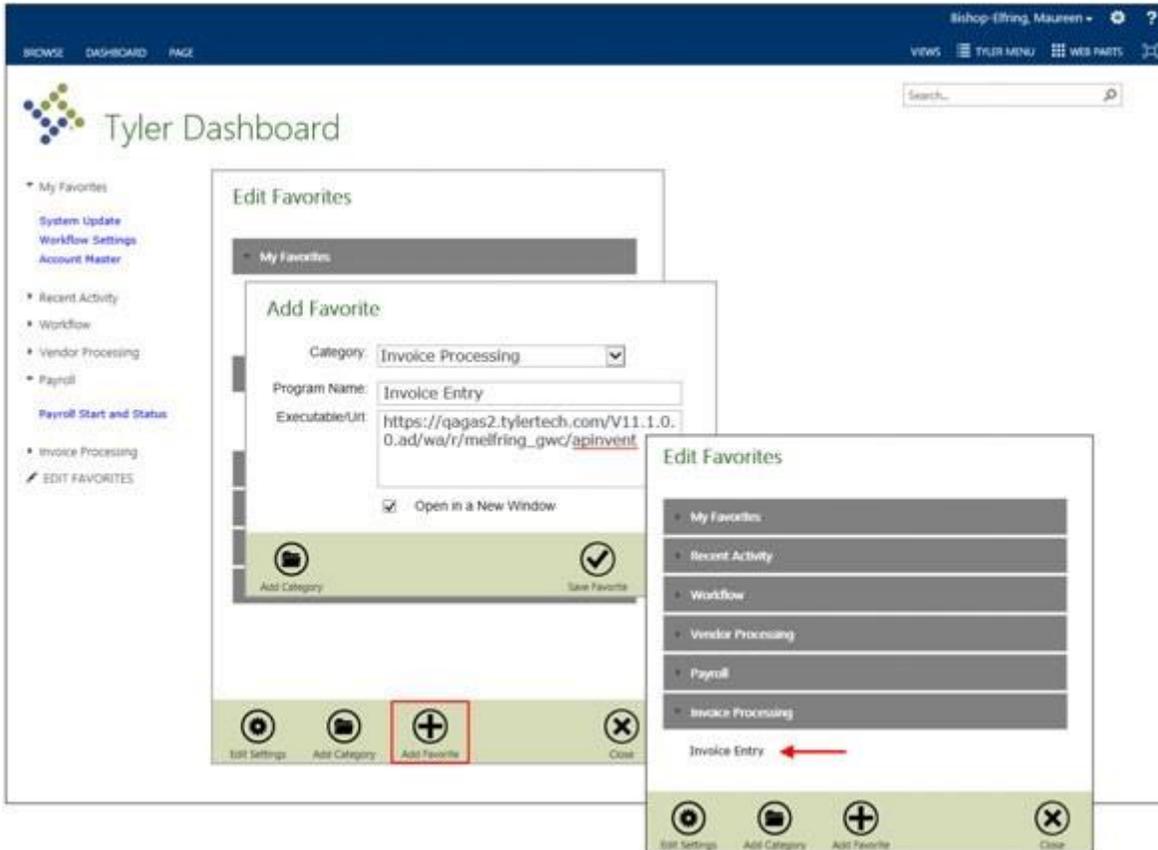
Edit Favorites manages the programs, websites, or other applications accessed from the My Favorites menu option. Edit Favorites also provides the option for creating new categories for organizing your personal dashboard menu.

To customize your My Favorites options, click **Edit Favorites** on the menu, and then in the Edit Favorites dialog box, click **Add Category**.

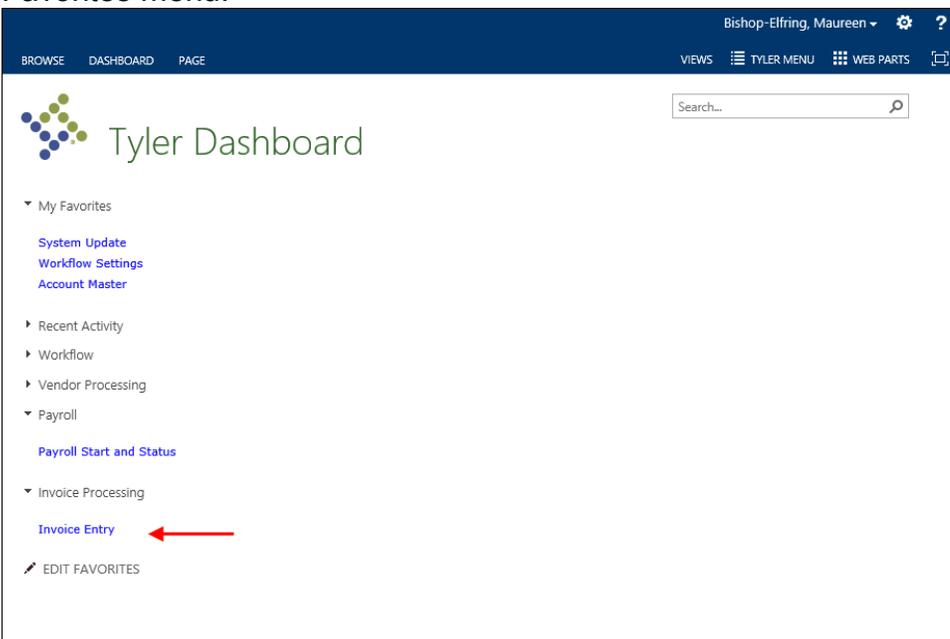


In the Add a Category dialog box, define a category name and click **Save Category**.

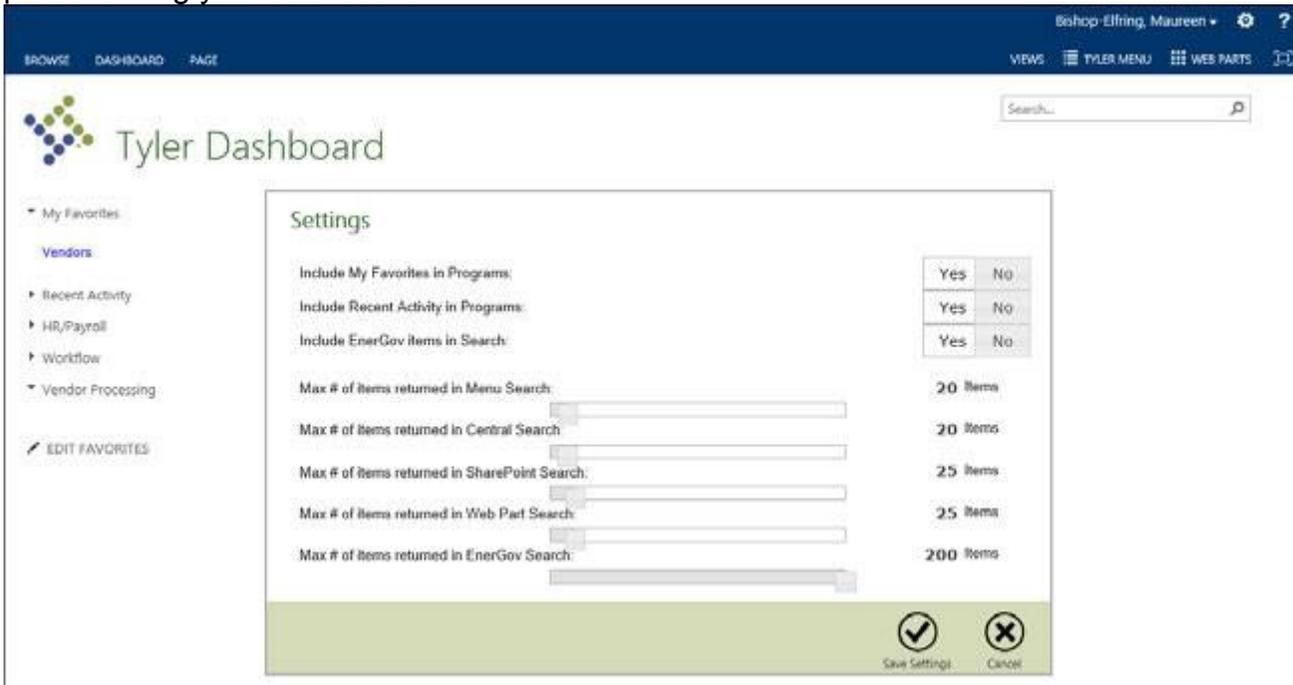
To add a favorite, click **Edit Favorites** on the menu, and then in the Edit Favorites dialog box, click **Add Favorite**.



Use the Add a Favorite dialog box to select the category and define the program name and applicable executable or URL. When you click **Save Favorite**, the program is available in your My Favorites menu.



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



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.

Web Parts

Web parts are web-based portals that display information from various Tyler products 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** in the Dashboard header.

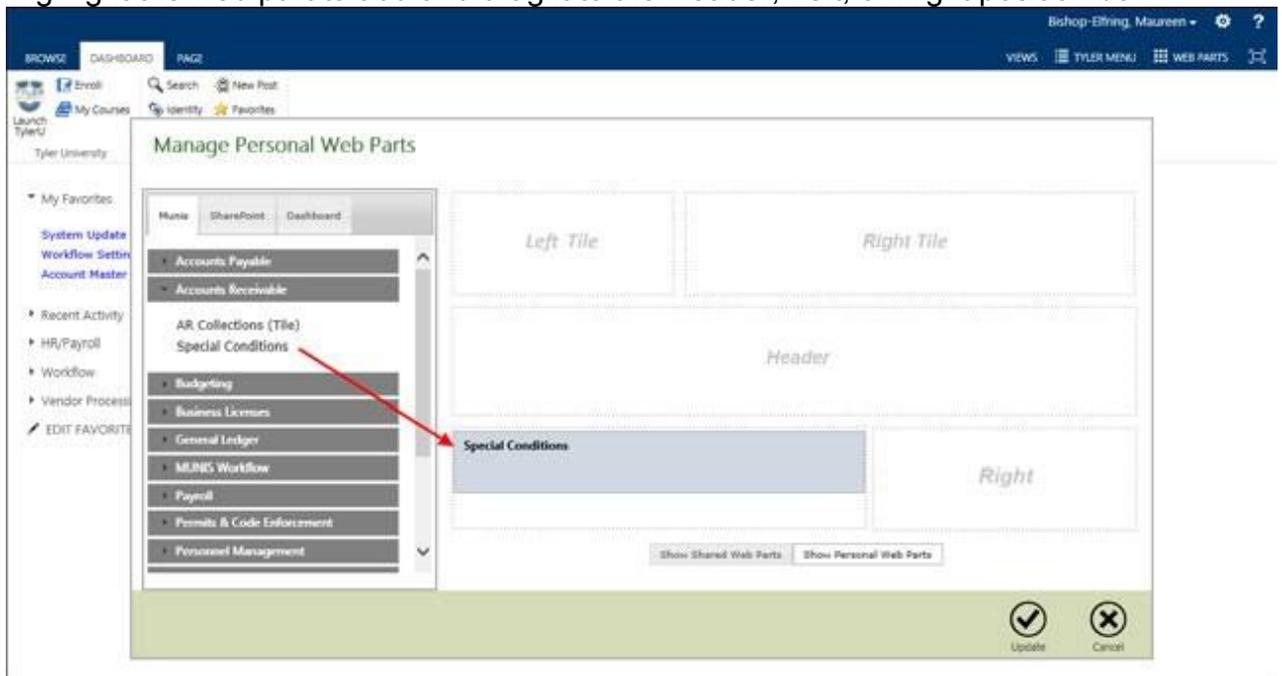


2. In the Manage Personal Web Parts dialog box, select the tab for the tenant web part to add: SharePoint, Dashboard, or your Tyler product.

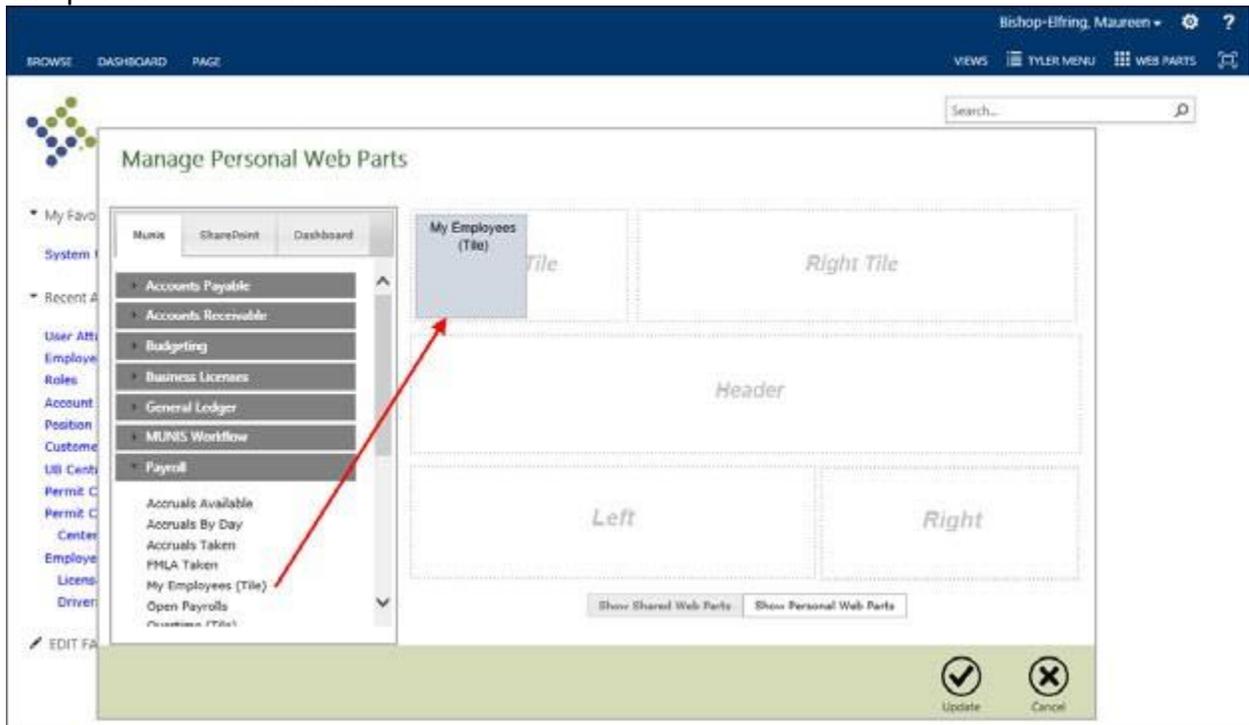
- For that tenant, expand the list of web part categories to find the web part to add.



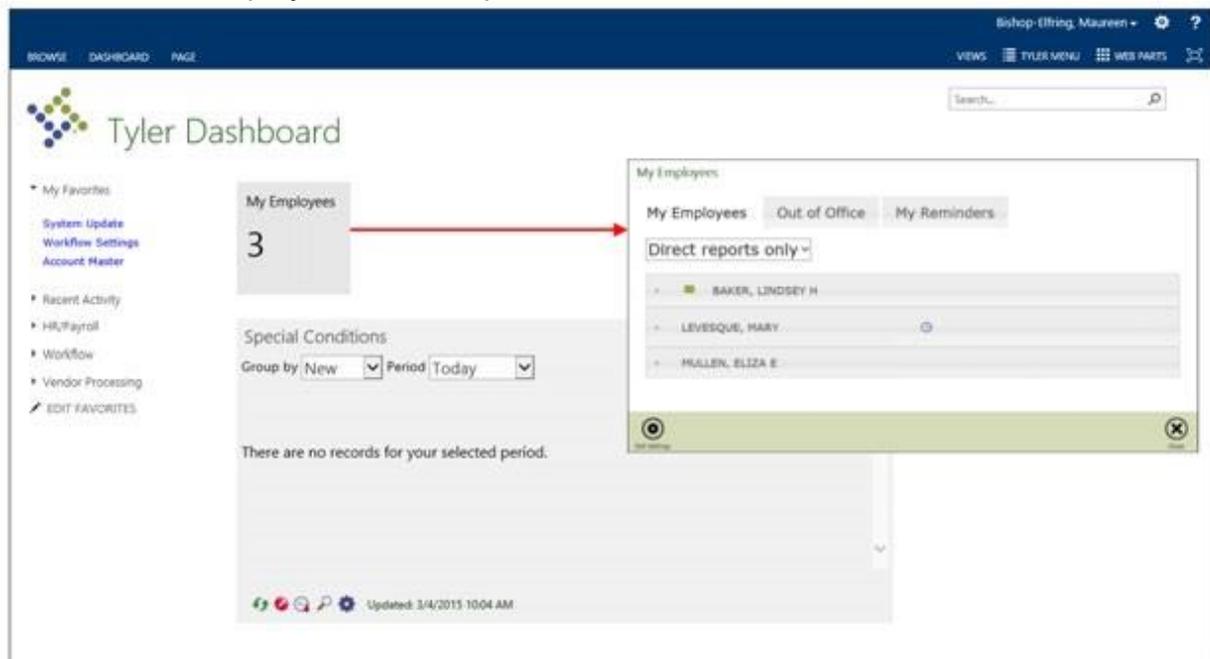
- Highlight the web part to add and drag it to the Header, Left, or Right position box.



To add a web part tile, highlight the web part name and drag it to the Left Tile or Right Tile placement location.

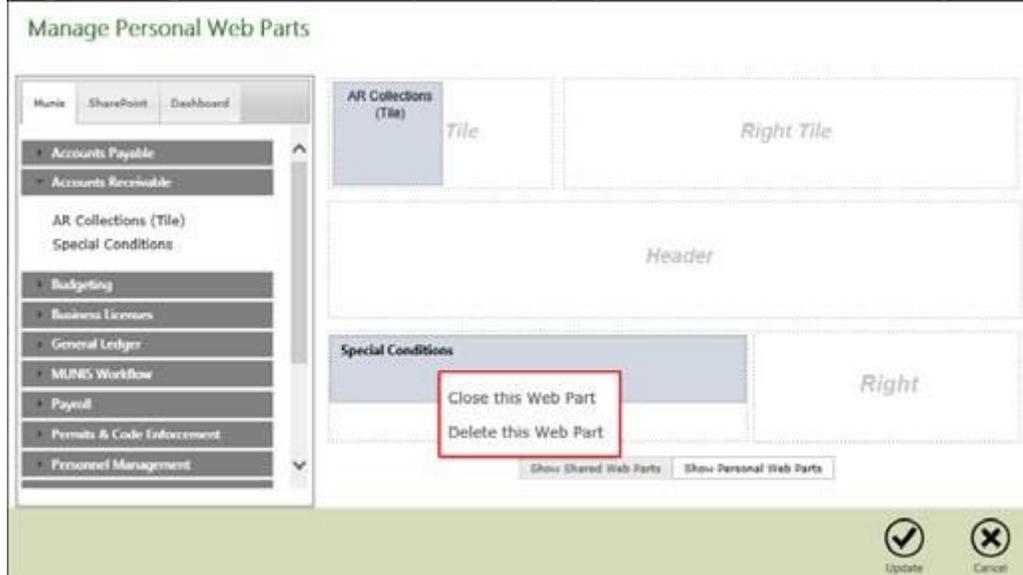


5. Click **Update** to save the web parts to your dashboard. On the Dashboard, standard web parts display the data as defined; for web part tiles, click the tile to display the full web part.

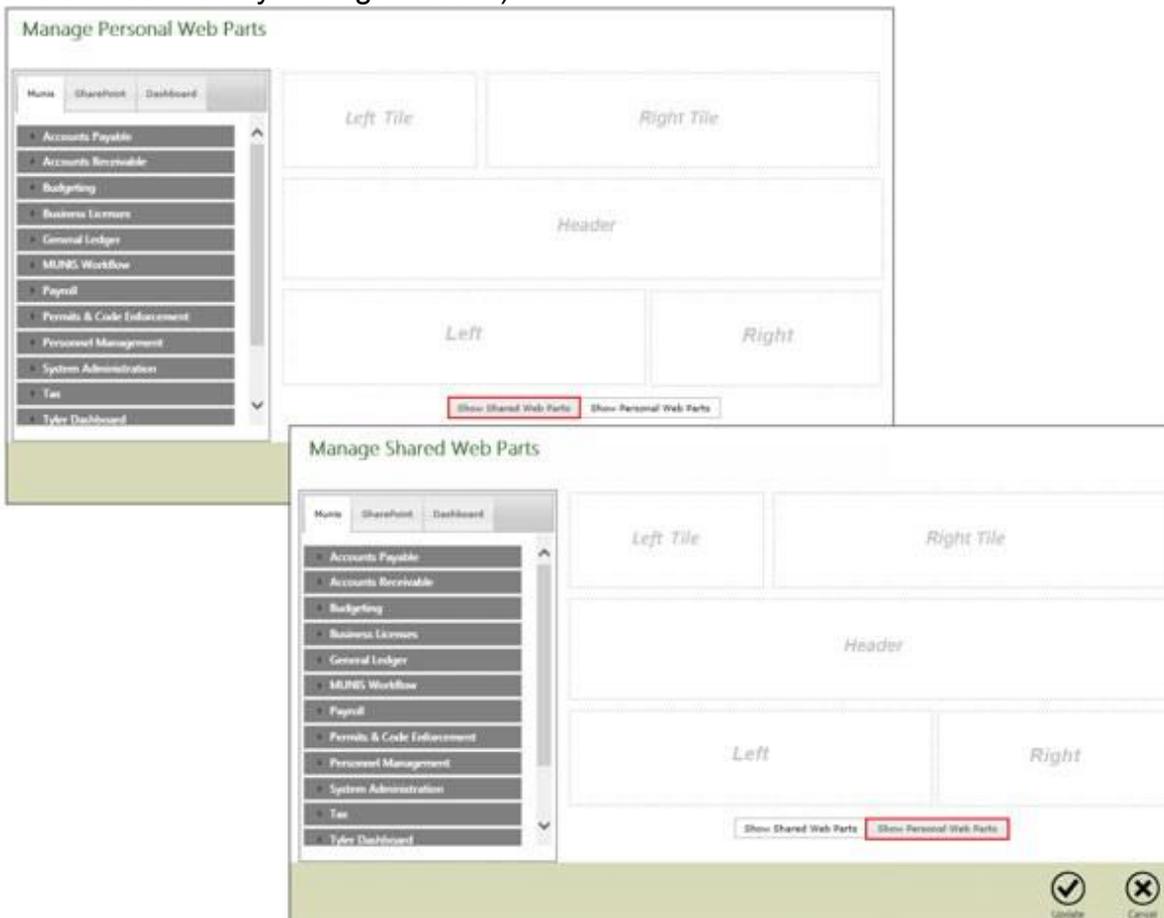


To hide a web part from view or to remove a web part, open the Web Part Maintenance

page and right-click the web part to display the Close and Delete options.



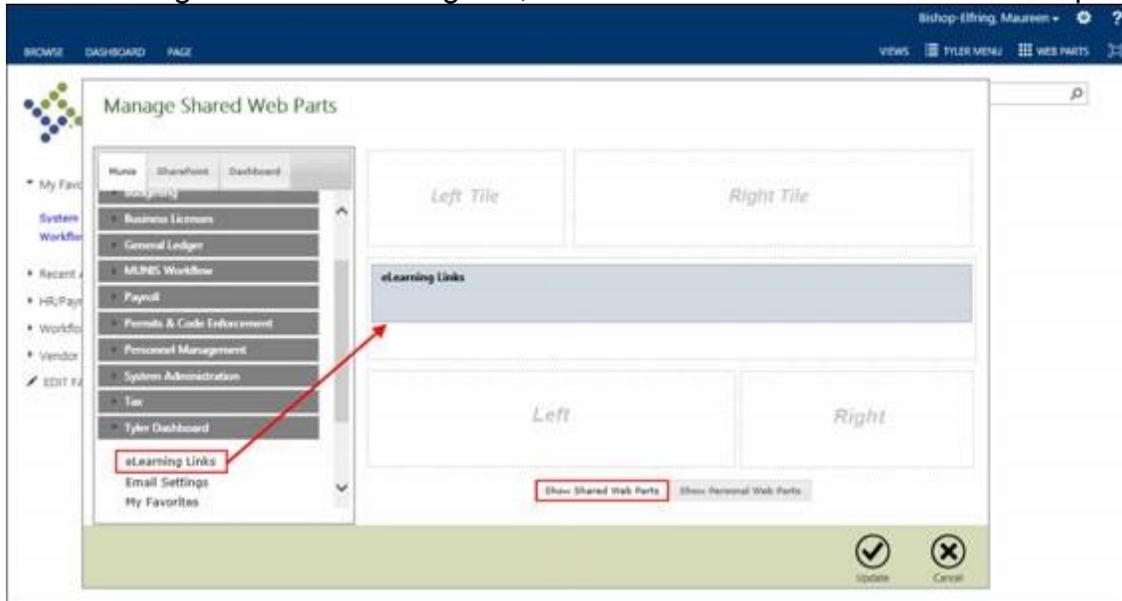
Use the **Show Shared Web Parts** and **Show Personal Web Parts** buttons to refresh the dialog box to display the personal view (your personal web parts) or shared view (web parts assigned and shared within your organization).



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.



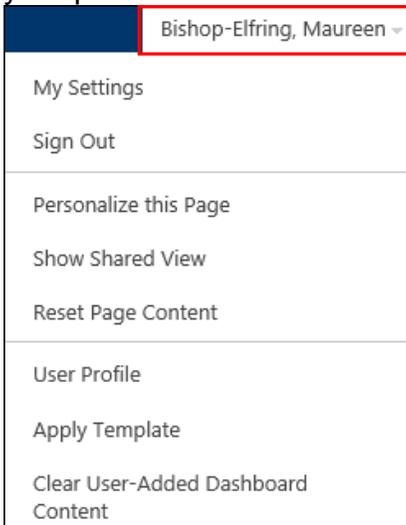
2. Navigate to the web part to add and drag it to a position box. When you save the change, the web part is available in the shared view.

See the [Web Parts](#) section in this document for more information on managing individual web parts.

Personal Preferences

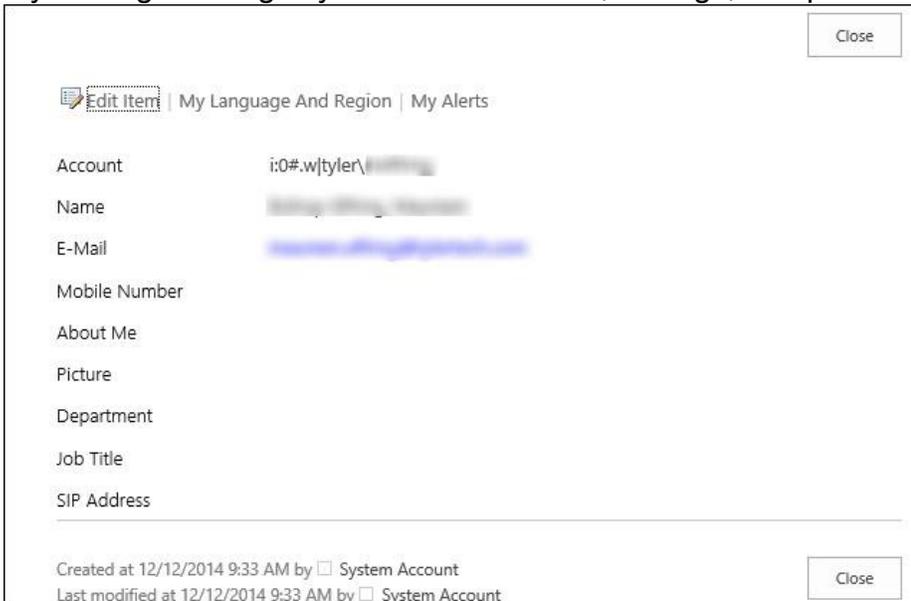
The Personal Preferences menu maintains your personal settings and personalizes your home page. Use the preference settings to set default values, clear personal web parts, or apply a template to your personal dashboard.

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.



My Settings

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



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

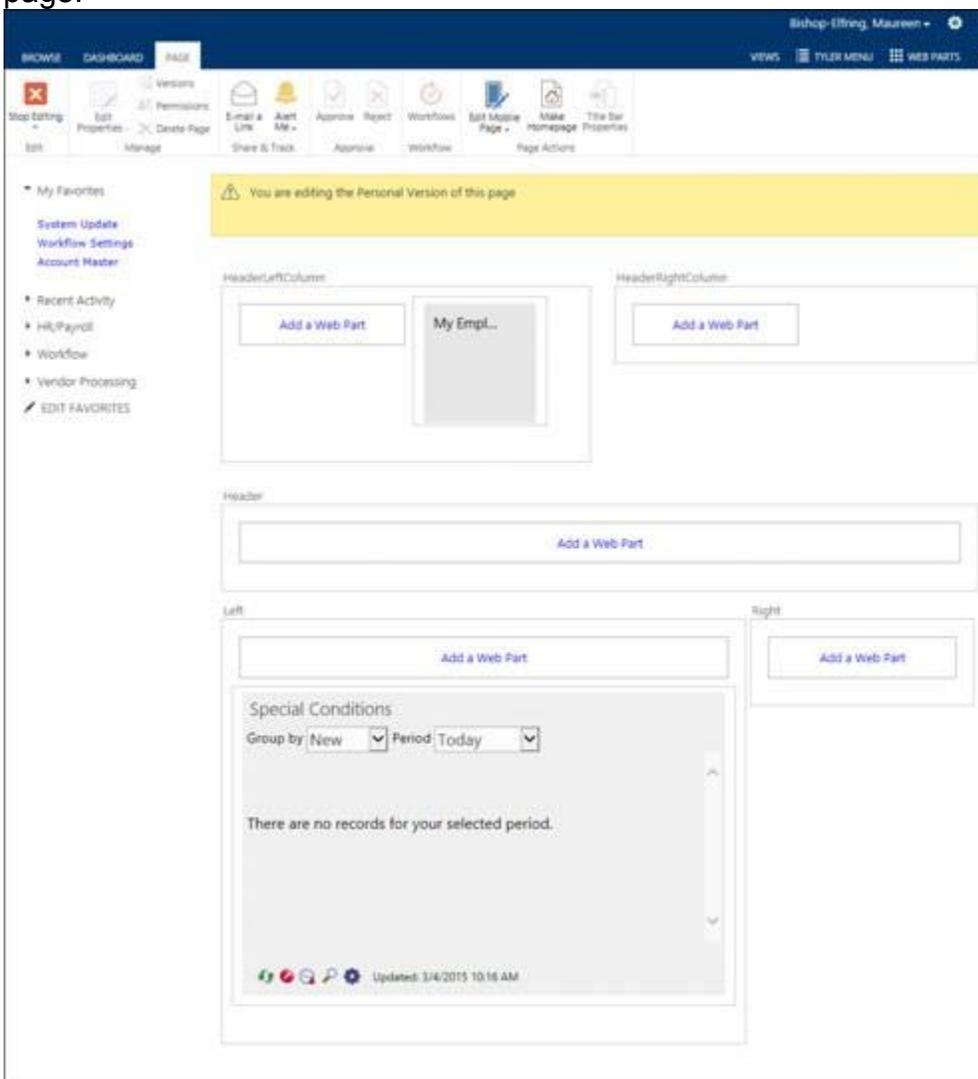
- My Language and Region—Identifies language preferences and the geographic region settings for your dashboard - county, time zone, standard calendar, standard work week and work days. If the Always Follow Web Settings check box is selected, these fields are not accessible.
- My Alerts—Manages alerts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



Show Shared View/Show Personal View

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

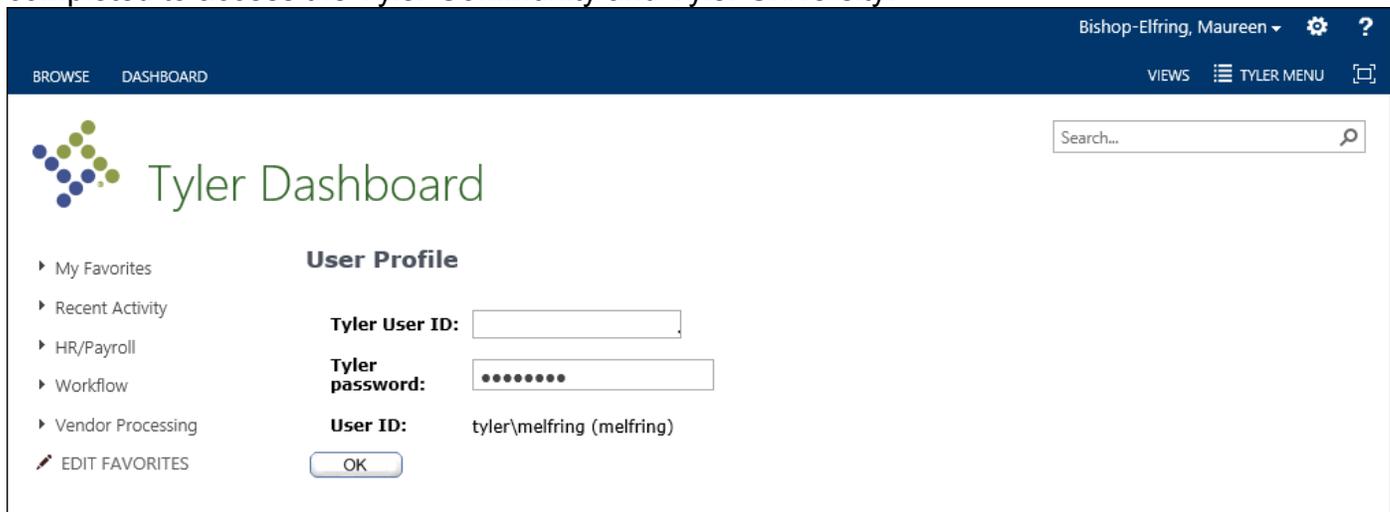
- If your Dashboard is currently set to show your personal dashboard, this option is Show Shared View. When you click Show Shared View, the Dashboard refreshes to show only the shared views available on your dashboard.
- If your Dashboard is currently set to show the shared view, this option is Show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

User Profile

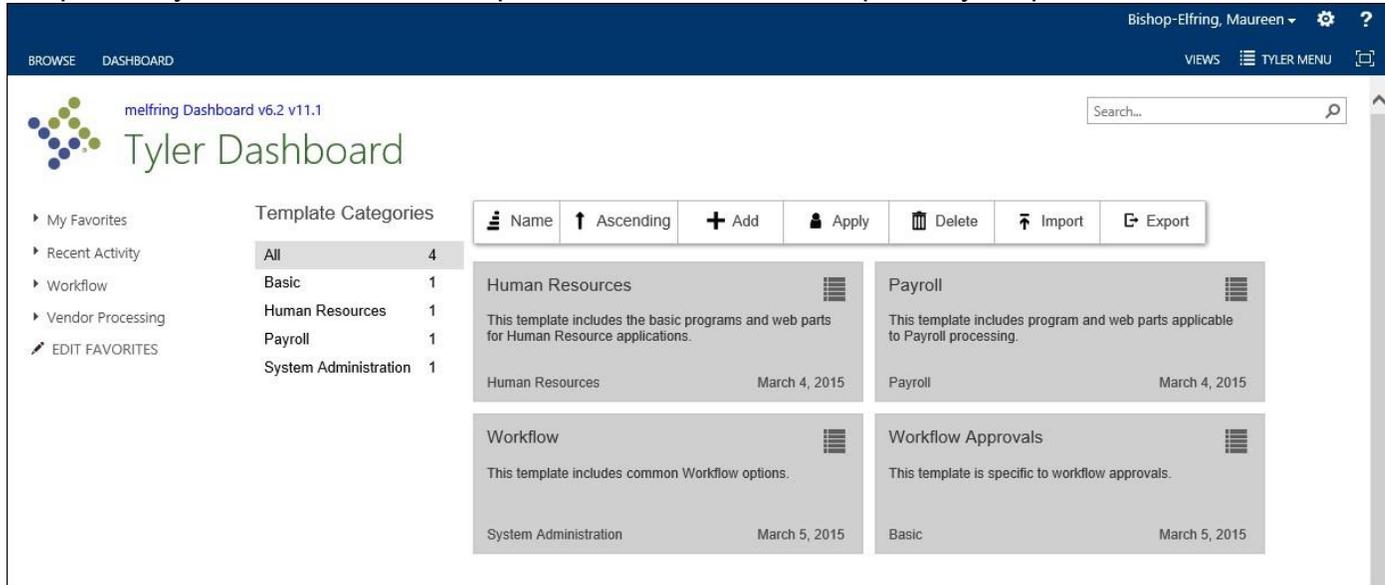
The user profile provides your Tyler user ID and password. The User Profile page must be completed to access the Tyler Community and Tyler University.



The screenshot shows the Tyler Dashboard interface. At the top right, the user name "Bishop-Elfring, Maureen" is displayed next to a settings gear icon and a help question mark icon. Below this, there are navigation links for "BROWSE" and "DASHBOARD", and "VIEWS", "TYLER MENU", and a refresh icon. A search bar with the placeholder "Search..." is located in the top right. The main content area features the Tyler logo and the text "Tyler Dashboard". On the left, there is a sidebar with a list of favorites: "My Favorites", "Recent Activity", "HR/Payroll", "Workflow", and "Vendor Processing", along with an "EDIT FAVORITES" button. The central focus is the "User Profile" section, which includes a "Tyler User ID:" field, a "Tyler password:" field with masked characters, and a "User ID:" label with the value "tyler\melfring (melfring)". An "OK" button is positioned below the password field.

Apply a Template

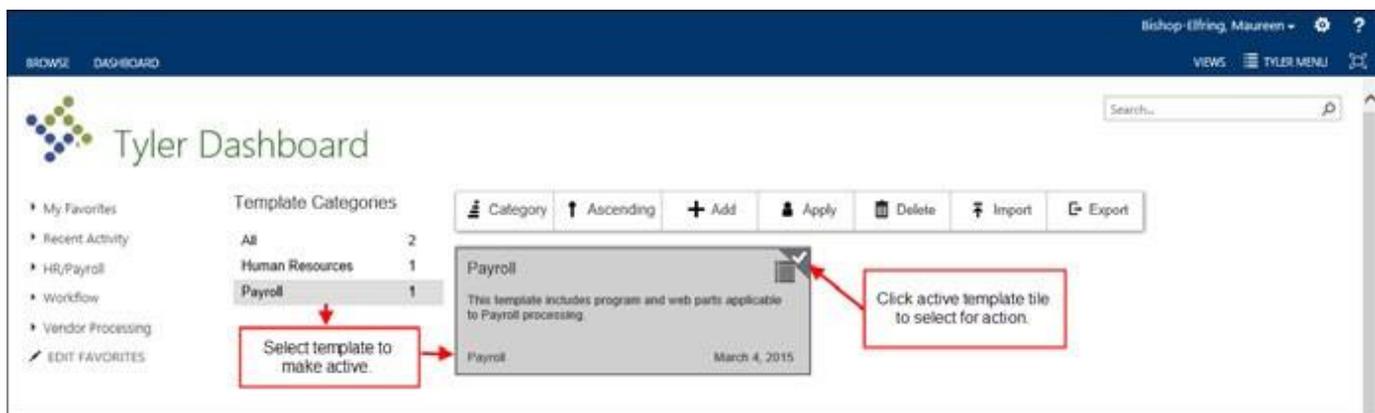
Apply Templates provides options for viewing and applying templates to your personal dashboard. Templates include predefined programs, web parts, views, or favorites, and when you apply a template to your dashboard, these predefined items become part of your personal dashboard.



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.

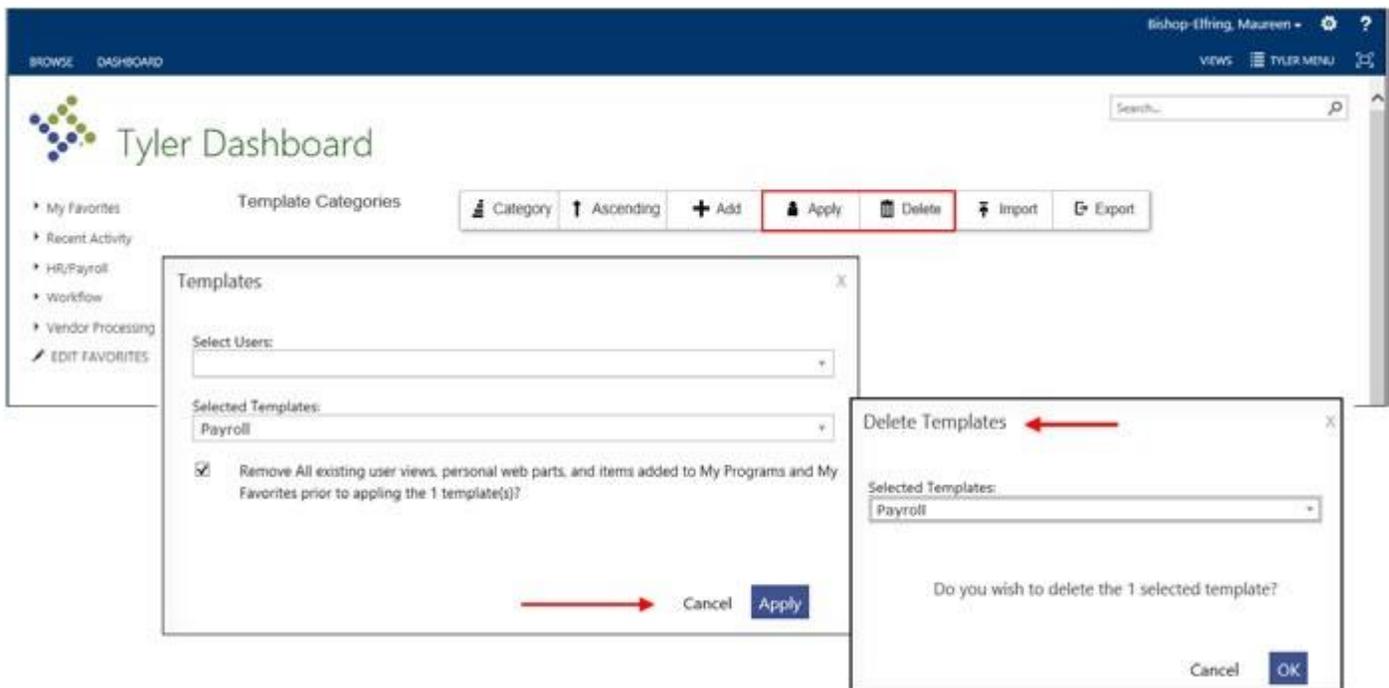
To select a template for action, select the template from the list of available templates, and then click the active template tile. The checkmark indicates the template is selected. Click the checkmark to clear the selection.



To view, update, delete, or duplicate a template, click the Menu button for the active template.



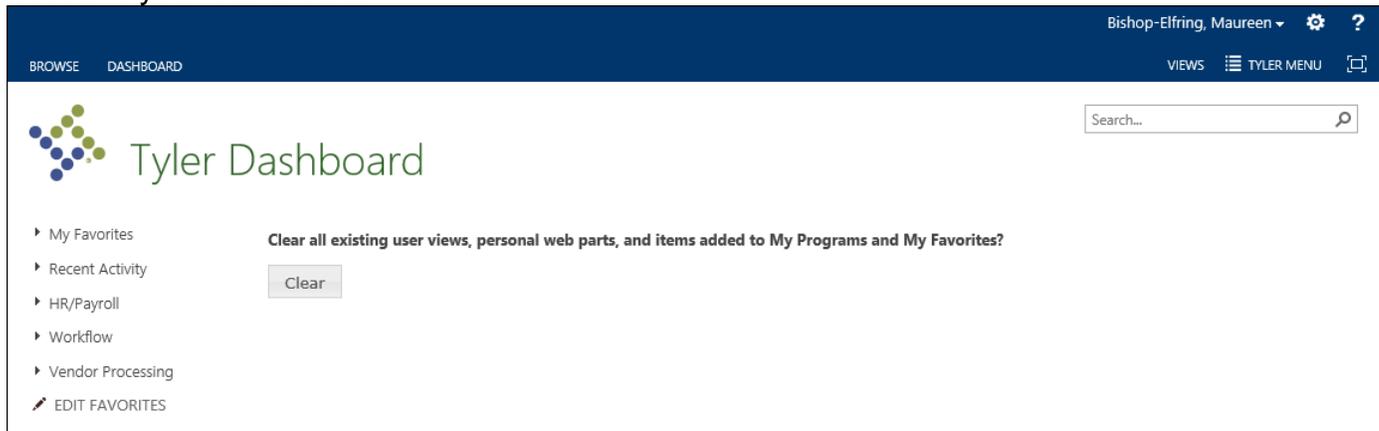
When you select Delete or Apply from the Templates page, the program displays the applicable dialog box.



When you select Import, the program provides the File Explorer window, allowing you to navigate to the file to import; when you select Export, the program provides an export confirmation. Templates are exported as a single XML file.

Clear User-Added Dashboard Content

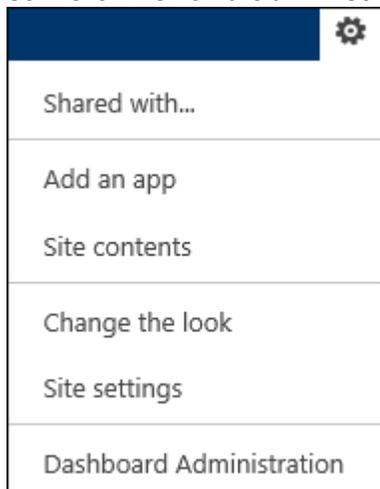
The Clear User-Added Dashboard Content clears all personal web parts, user views, and items added to your dashboard.



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.

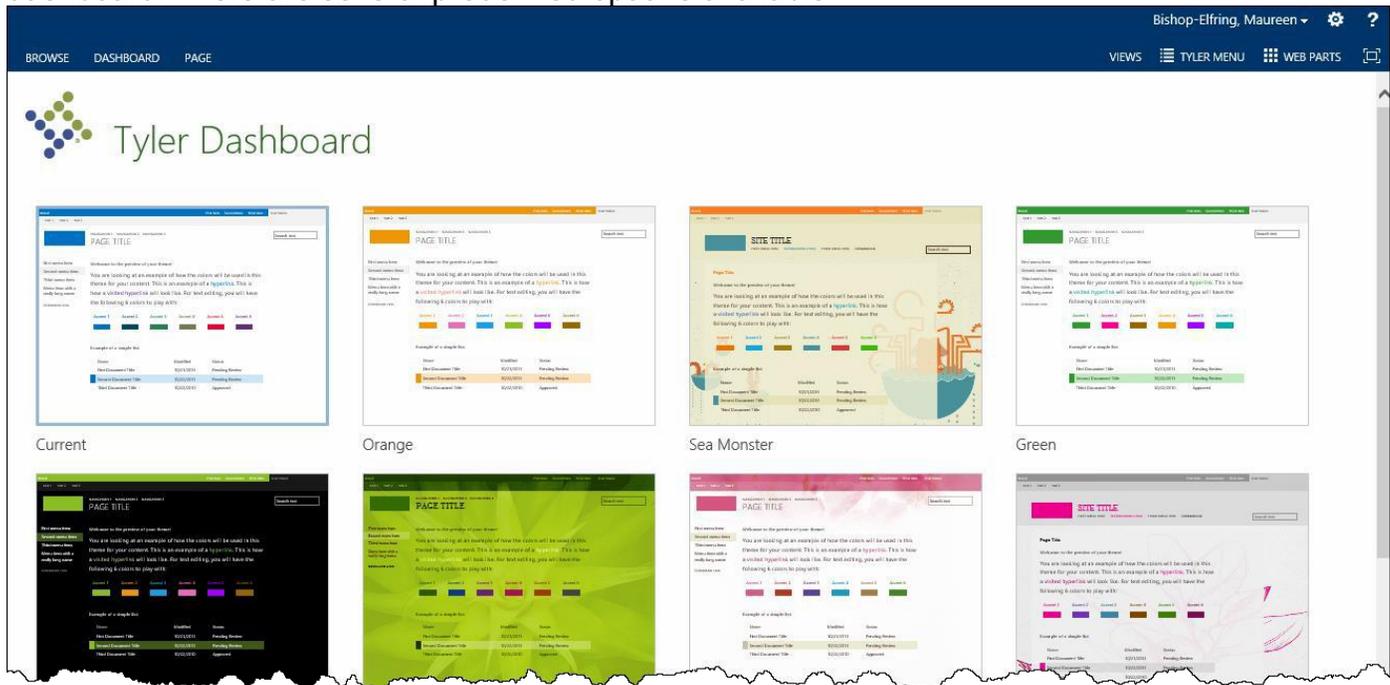
Settings

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.



Change the Look

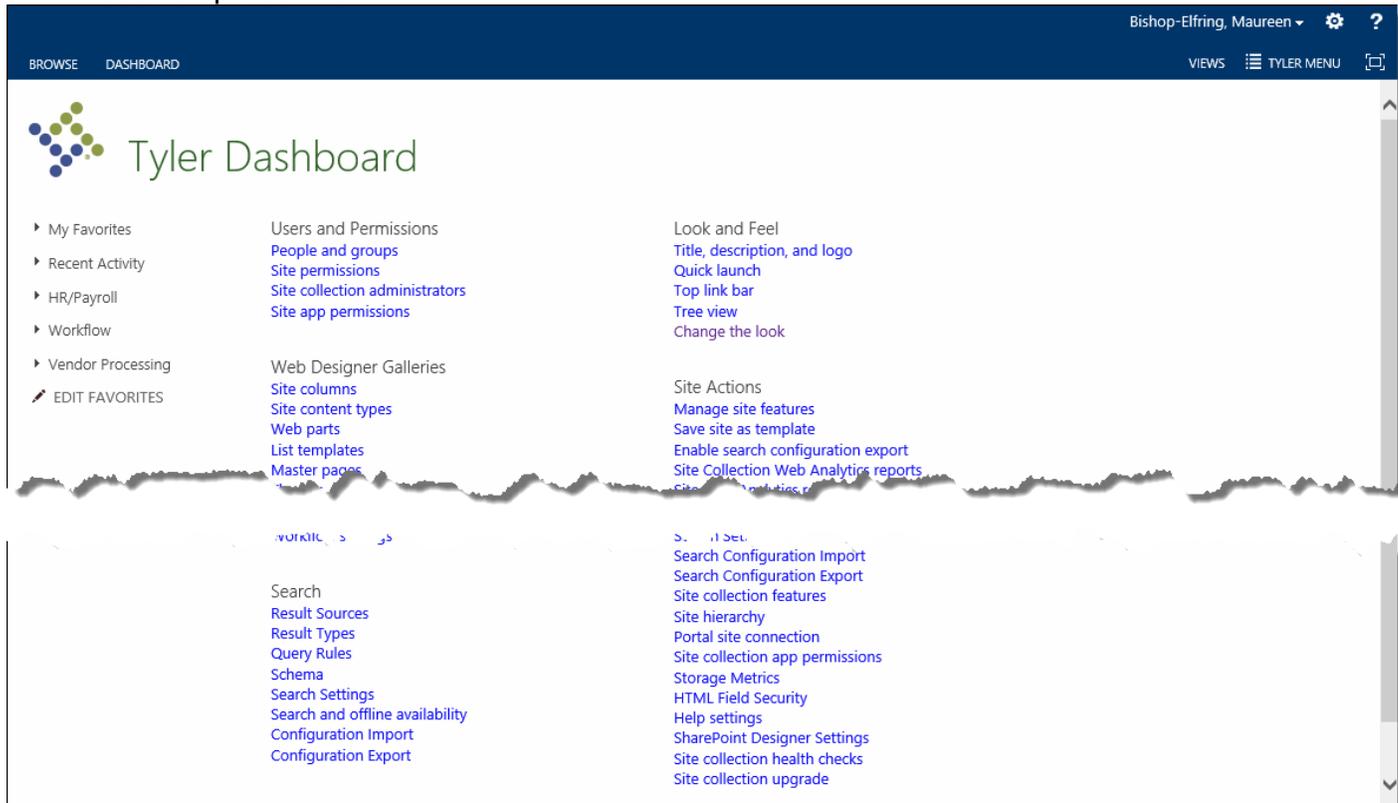
Change the Look provides templates for color and style changes that apply to your personal dashboard. There are several predefined options available.



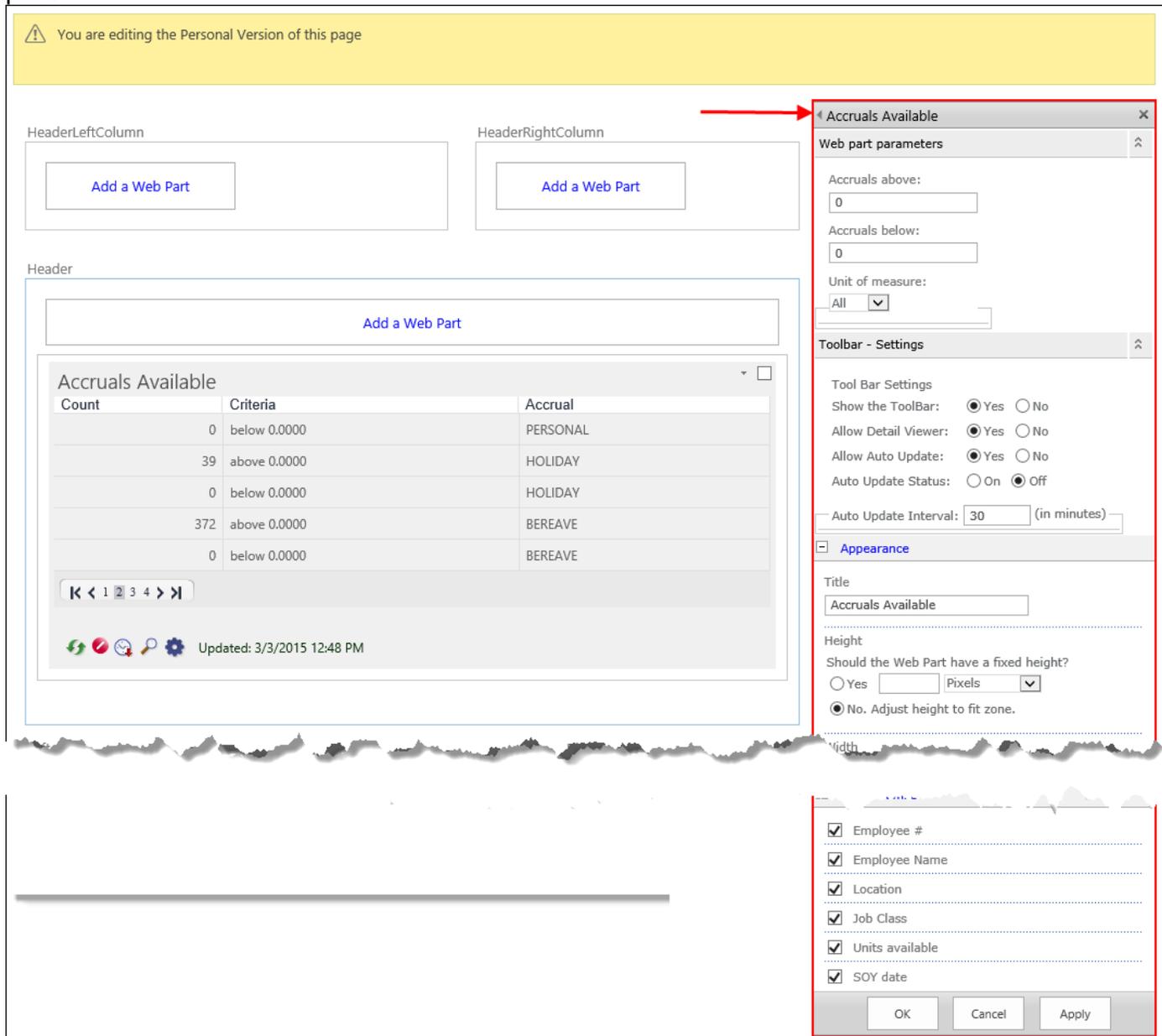
Site Settings

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.



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



You are editing the Personal Version of this page

HeaderLeftColumn: Add a Web Part

HeaderRightColumn: Add a Web Part

Header: Add a Web Part

Count	Criteria	Accrual
0	below 0.0000	PERSONAL
39	above 0.0000	HOLIDAY
0	below 0.0000	HOLIDAY
372	above 0.0000	BEREAVE
0	below 0.0000	BEREAVE

Updated: 3/3/2015 12:48 PM

Accruals Available Settings:

- Web part parameters:
 - Accruals above: 0
 - Accruals below: 0
 - Unit of measure: All
- Toolbar - Settings:
 - Show the ToolBar: Yes No
 - Allow Detail Viewer: Yes No
 - Allow Auto Update: Yes No
 - Auto Update Status: On Off
 - Auto Update Interval: 30 (in minutes)
- Appearance:
 - Title: Accruals Available
 - Height: Yes No. Adjust height to fit zone.
 - Width: []

Secondary Settings:

- Employee #
- Employee Name
- Location
- Job Class
- Units available
- SOY date

Buttons: OK, Cancel, Apply

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.