



Tyler Hub User Guide

2019.3

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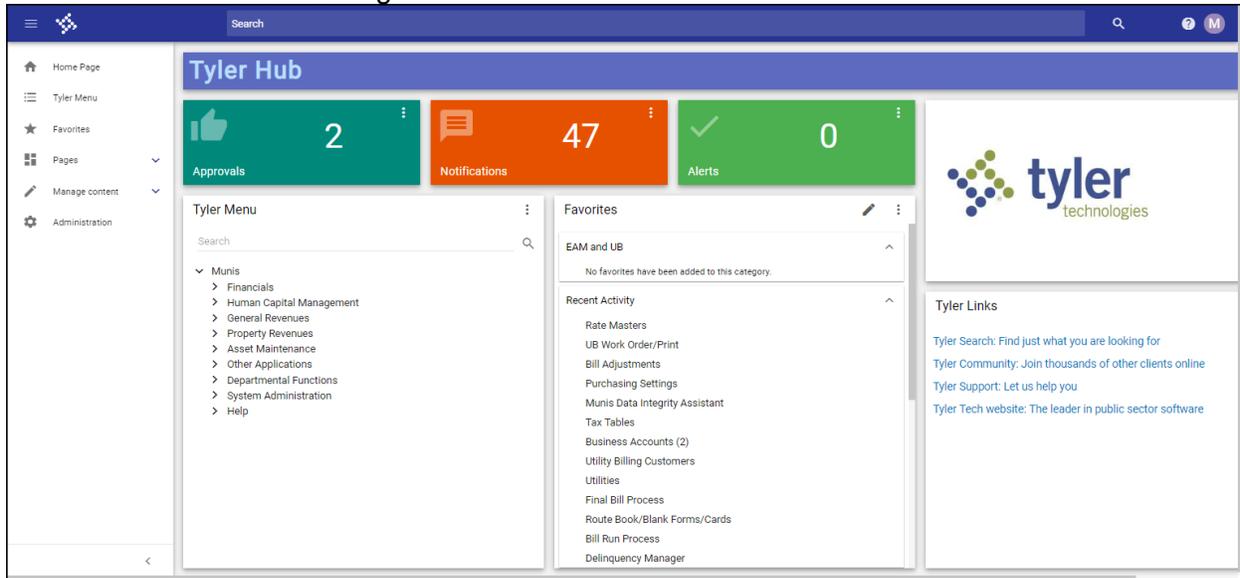
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1 INTRODUCTION

Tyler Hub is a central application that brings together permissions-based data from multiple places, providing content pages that target the tasks you perform daily. Tyler Hub provides options to change how you view data, and it features a variety of visualizations that organize data to make it more meaningful.



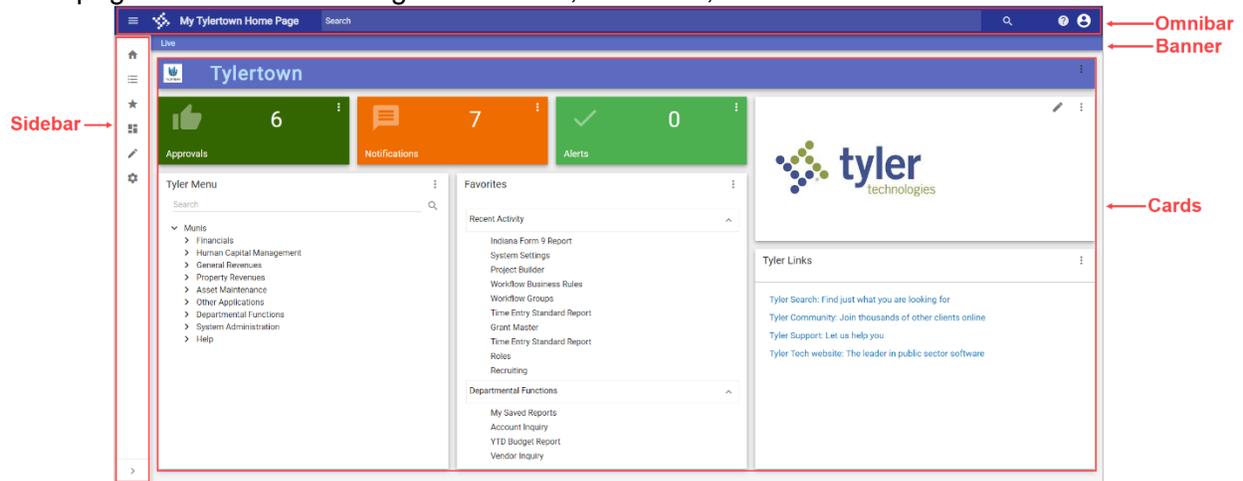
The *Tyler Hub User Guide* provides basic descriptions and procedures for using the Tyler Hub. The examples provided in this document are based on using Tyler Hub with Munis; the functionality is the same when you are using Tyler Hub with your Tyler product.

The features and options provided within Tyler Hub are available according to your user permissions. If you are unable to see an option or complete a task, see your system administrator to update your permissions.

Additional Tyler Hub documentation is available in the Tyler Hub group of the Tyler Community.

2 TYLER HUB

Throughout the application, Tyler Hub shares similar characteristics and features. For example, each page of the Hub including the omnibar, a sidebar, and cards.



2.1 OMNIBAR

The omnibar includes the Menu button, the Tyler logo and page name, the Search box, the Help button, and the User Information option.

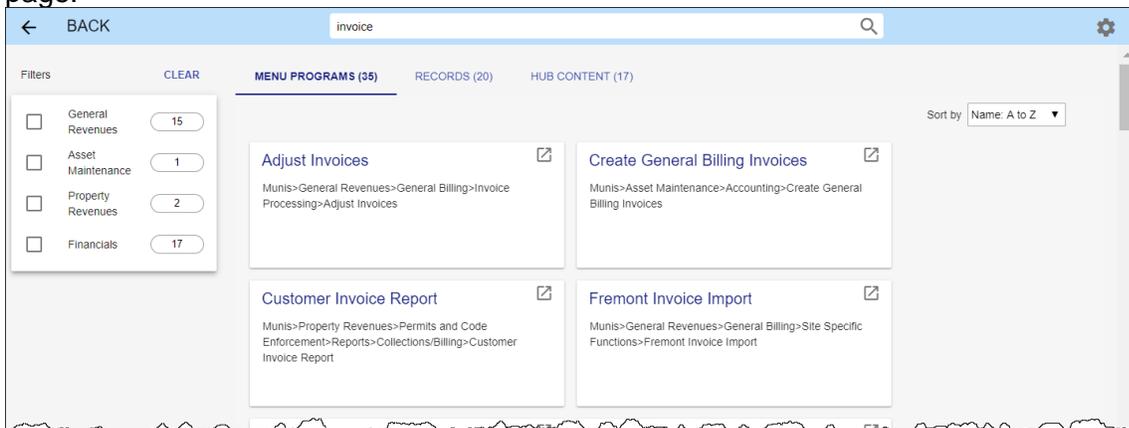


2.1.1 Menu Button, Logo, and Search

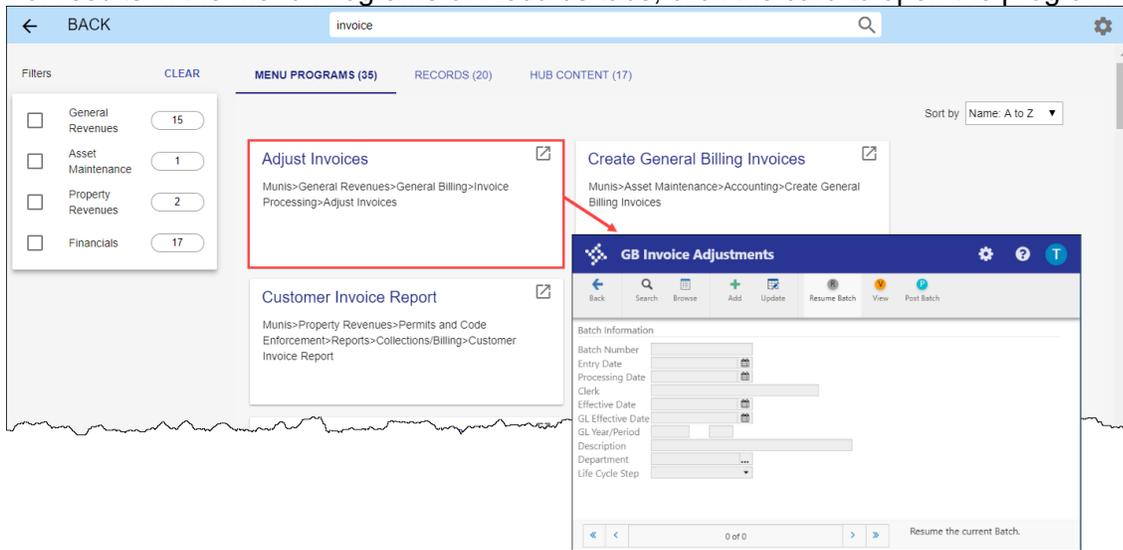
The Menu button expands or collapses the sidebar, which contains your options for using and maintaining the Hub.

The Tyler logo and page name refreshes the screen to display your Home page.

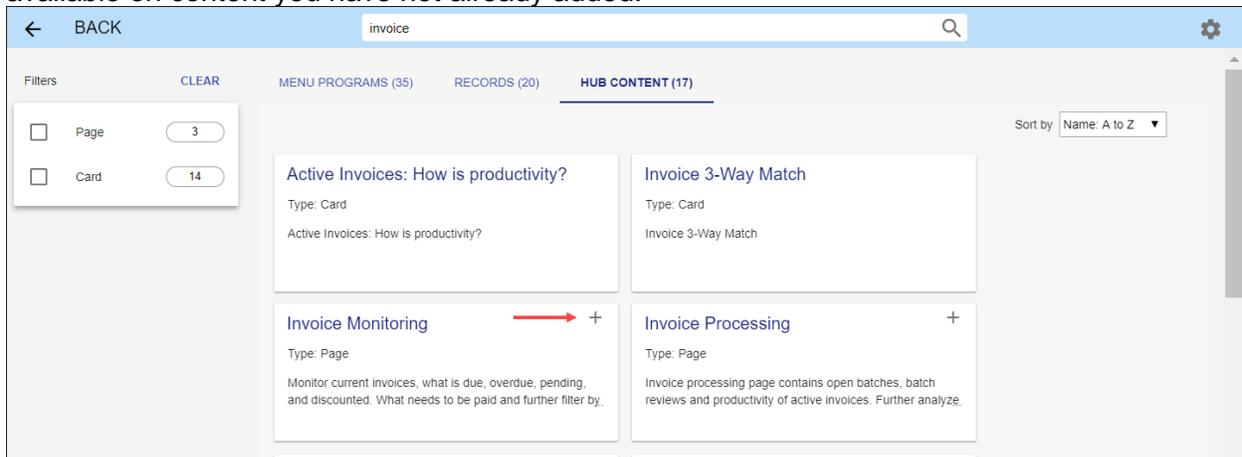
The Search feature searches the Hub using user-defined keywords or other search criteria. When you enter search criteria, the program displays applicable results from menu programs, records, and Tyler Hub content. The program presents the results as individual cards on the page.



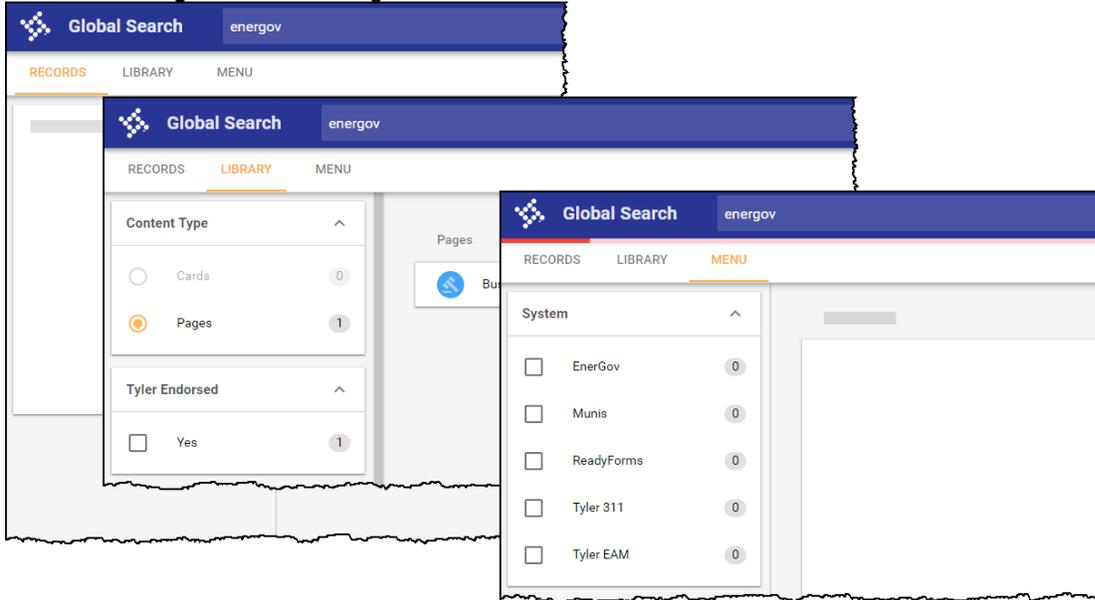
For results in the Menu Programs or Records tabs, click the card to open the program or record.



For results in the Hub Content tab, click the Add button to add that item. The button is only available on content you have not already added.



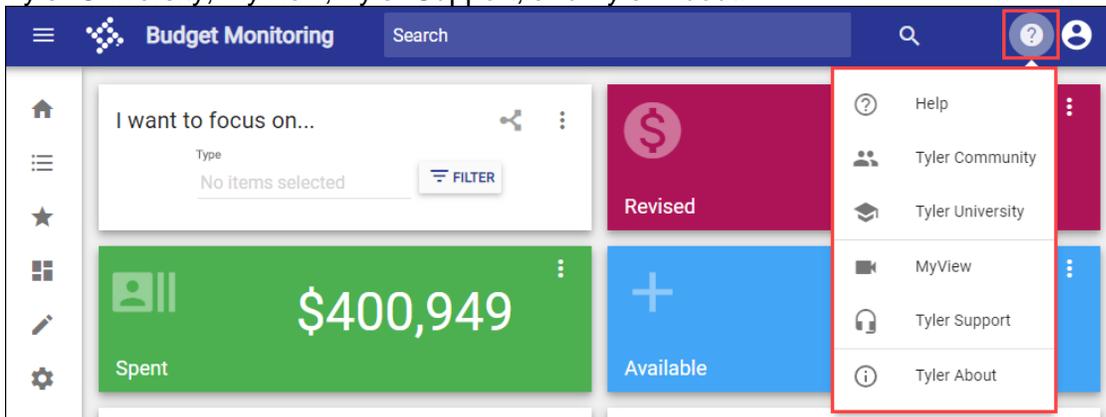
If your organization has multiple Tyler products enabled within Tyler Hub and your administrator has enabled global searching, the Search feature refreshes to the Global Search feature.



Using Global Search, you can enter search criteria that is applicable to multiple products and the search results includes items from each.

2.1.2 Help

The Help button provides a menu of Tyler Hub resources, including Help, Tyler Community, Tyler University, MyView, Tyler Support, and Tyler About.



Note: Depending on your configuration settings, your system may not display all options.

- Help provides access to Tyler Hub online help. Within the help application, use the Contents panel to navigate to specific topics for more information, or use the Search feature to define criteria and quickly locate matching results.
- Tyler Community is a user-driven support community that provides user forums, product documentation, resource pages, and opportunities to submit product suggestions. Tyler Community is accessible from your Tyler product client support page.

In Tyler Community, Tyler product information is available by community group. For example, the Tyler Hub group provides news and information about Tyler Hub releases. To access specific product groups, you must register for group membership. To join a group, select the product from the menu (for example, Tyler) and select the group to join.

- Tyler University provides access to e-learning courses offered through Tyler U. When you select Tyler University from the Help menu, the courses are presented on two tabs: Learn About... and Prerequisites.
 - The Learn About... tab contains all the available Tyler University courses. Enter your criteria in the search bar to search for classes by subject. Or, click the arrow to expand a topic and view courses relating to that subject.
 - The Prerequisites tab contains a checklist of courses that are designed to help new users get started with the programs. A progress bar indicates the percentage of courses that have been completed. Completed courses are crossed out.
- MyView captures video of a process to include with an incident submission to Tyler Support. **Important!** Before you use My View, you must ensure you are adhering to your organization's security policies and procedures. It is recommended that you review your organizational guidelines prior to consenting to use MyView.
- Tyler Support
Tyler Support opens the Tyler Client Support website where you can choose your Tyler product and request access to live support or online support incidents.
- Tyler About
Tyler About provides information about the installed version of Tyler Hub and any integrated Tyler systems. For the Hub entry, click the Information button to show or hide the build stamp associated with your version.

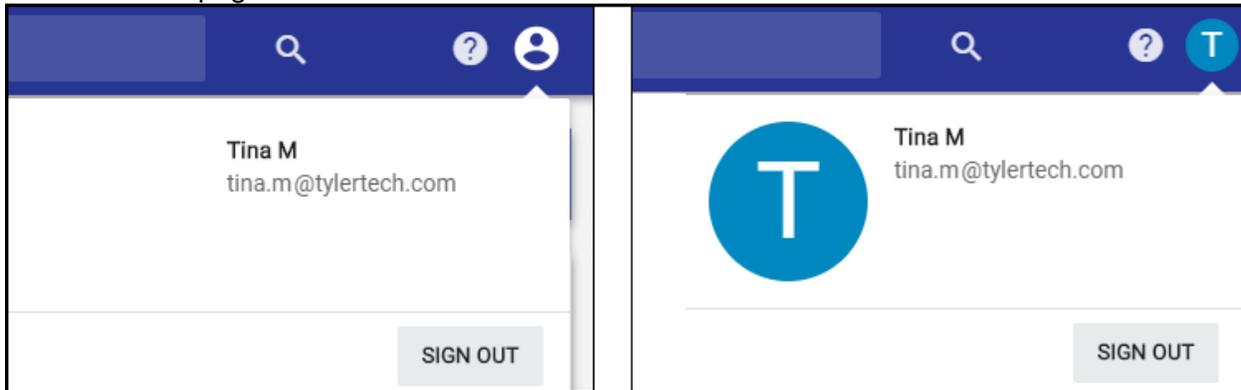
2.1.3 User Information

The User Information button is available in the right corner of the omnibar.



Clicking this option displays information about who is currently logged in through Tyler Identity. An option to sign out is also available. If you sign out from Tyler Hub, you must enter a valid Tyler Identity user name and password to sign in again.

Depending on your organization's settings, this button provides either an icon or the first initial of the current user. Administrators control this option in the Toolbar Settings group of the Administration page.

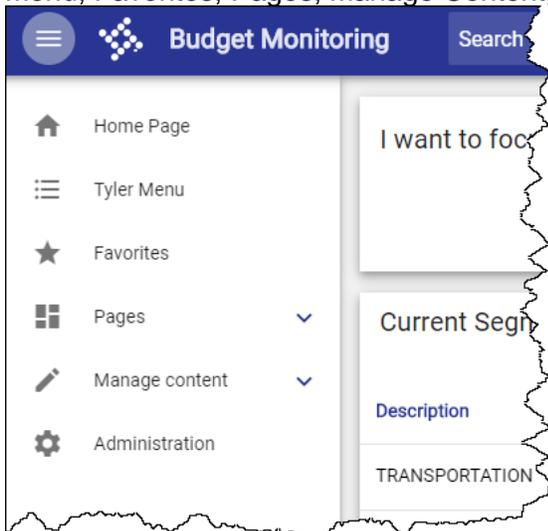


2.2 MENU AND SIDEBAR

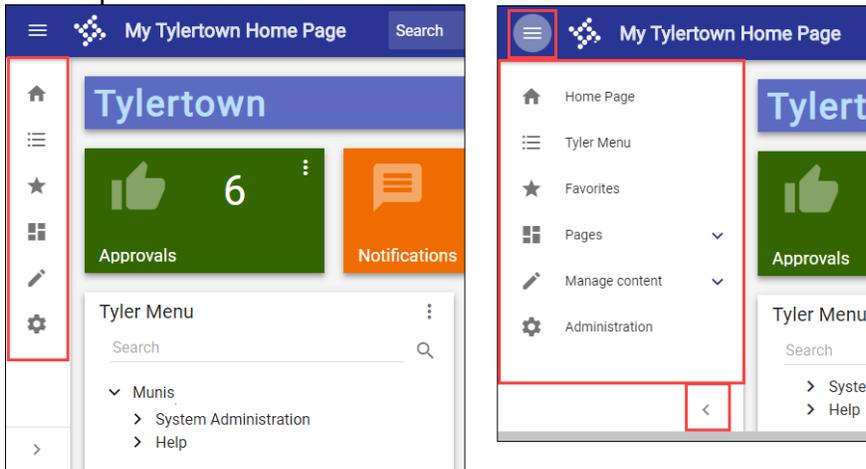
The Menu button is available on the left side of the omnibar.



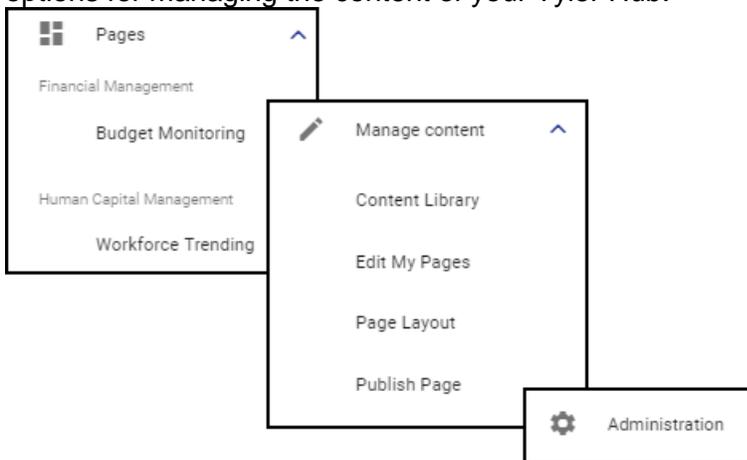
When you click this option, the system expands the sidebar to display the Home Page, Tyler Menu, Favorites, Pages, Manage Content, and Administration options.



The sidebar is available on every page and can be collapsed to display only icons or expanded to provide label text. Click the Menu button or the arrow at the bottom of the sidebar to expand or collapse the sidebar.



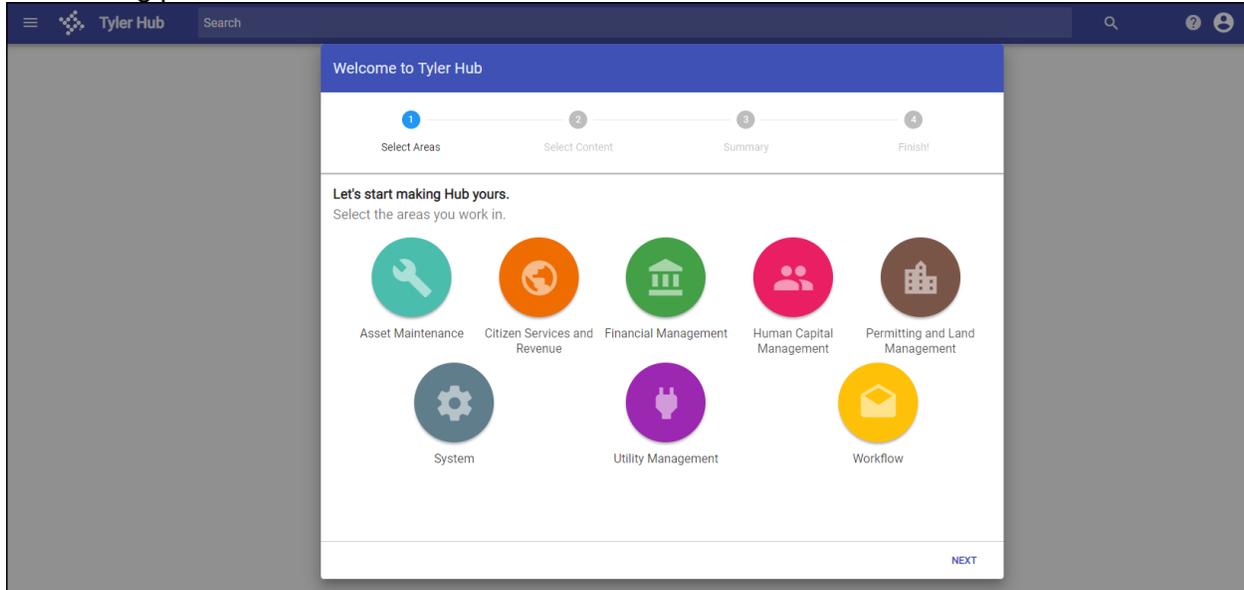
When the sidebar is expanded, the Pages, Manage Content, and Administration groups provide options for managing the content of your Tyler Hub.



- The Pages group provides access to all the pages that have been added to your Tyler Hub instance. An administrator may have assigned these to your user role, or you may have added them during the onboarding process. Only the pages that have been added for your user role are available in this list.
- The Manage Content group provides options to edit content and page layouts if appropriate permissions have been assigned to your user role. If you do not have the proper permissions assigned, these options are not available.
- The Administration option on the sidebar is available only if your user role has been granted permission to access the Tyler Hub Administration page. The Administration pages are typically restricted as these pages contain system configurations.

3 ONBOARDING

When you access Tyler Hub for the first time, or after clicking the Start Fresh option in the Edit My Pages dialog box, the program provides step-by-step instructions to complete the Tyler Hub onboarding process.

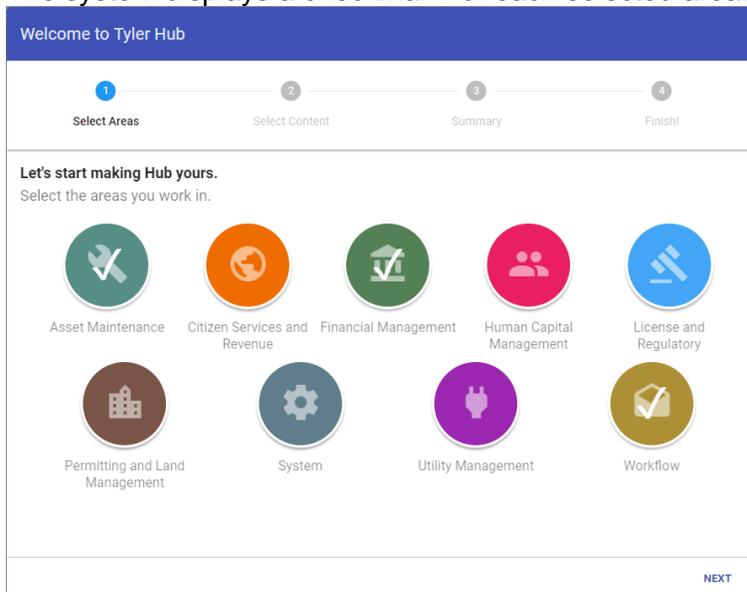


Note: Administrators can disable the onboarding process so depending on your organizational requirements, your environment may not include the onboarding process.

To complete the onboarding process:

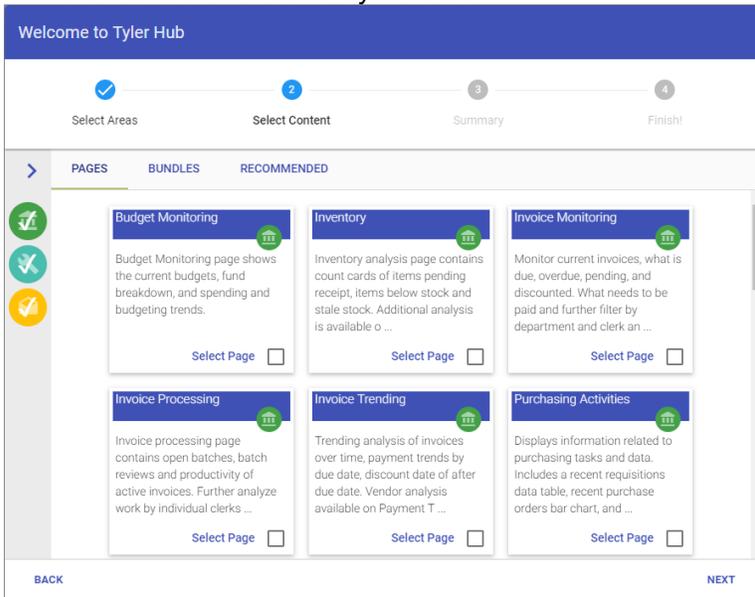
1. Click one or more icons to choose the areas in which you work. The available options vary according to your organization's modules.

The system displays a checkmark for each selected area.



2. Click Next.

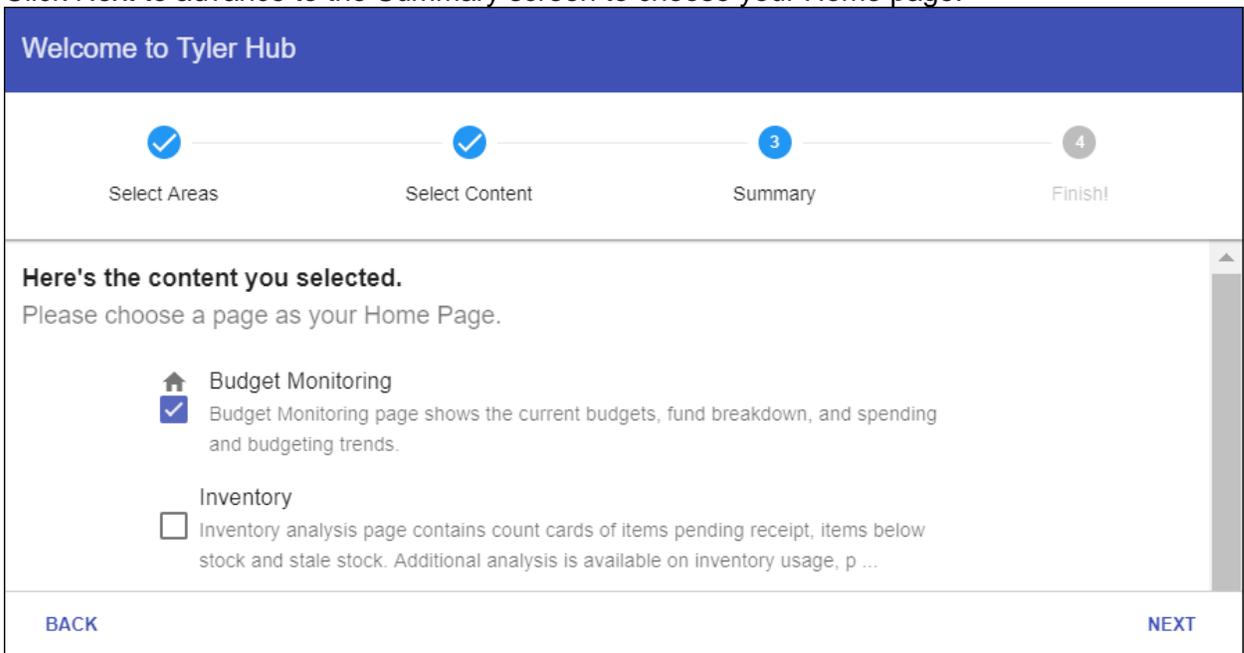
The program advances to the Select Content screen where you can choose the pages or content bundles to add to Tyler Hub.



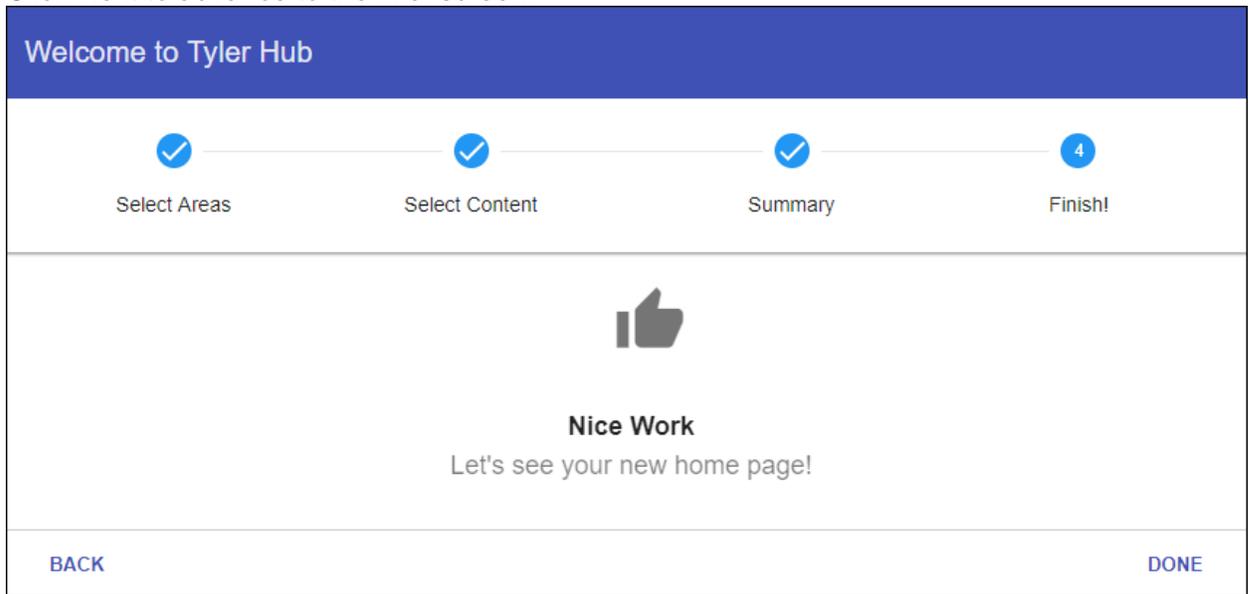
Note: If you are migrating from the Tyler Dashboard, the system displays the Recommended tab. This tab suggests pages to add in Tyler Hub based on your existing web parts and favorite programs.

3. Select the check box for each page or content bundle to include.

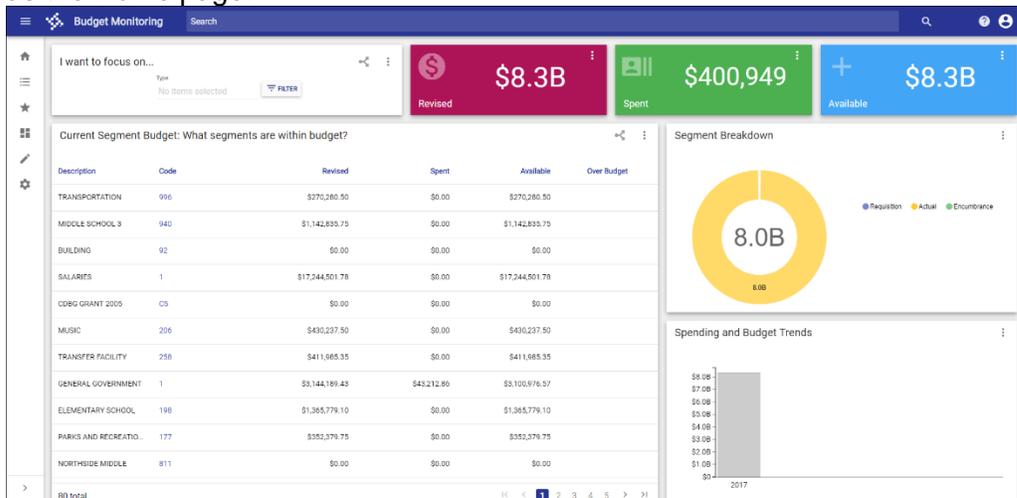
4. Click Next to advance to the Summary screen to choose your Home page.



- Click Next to advance to the final screen.

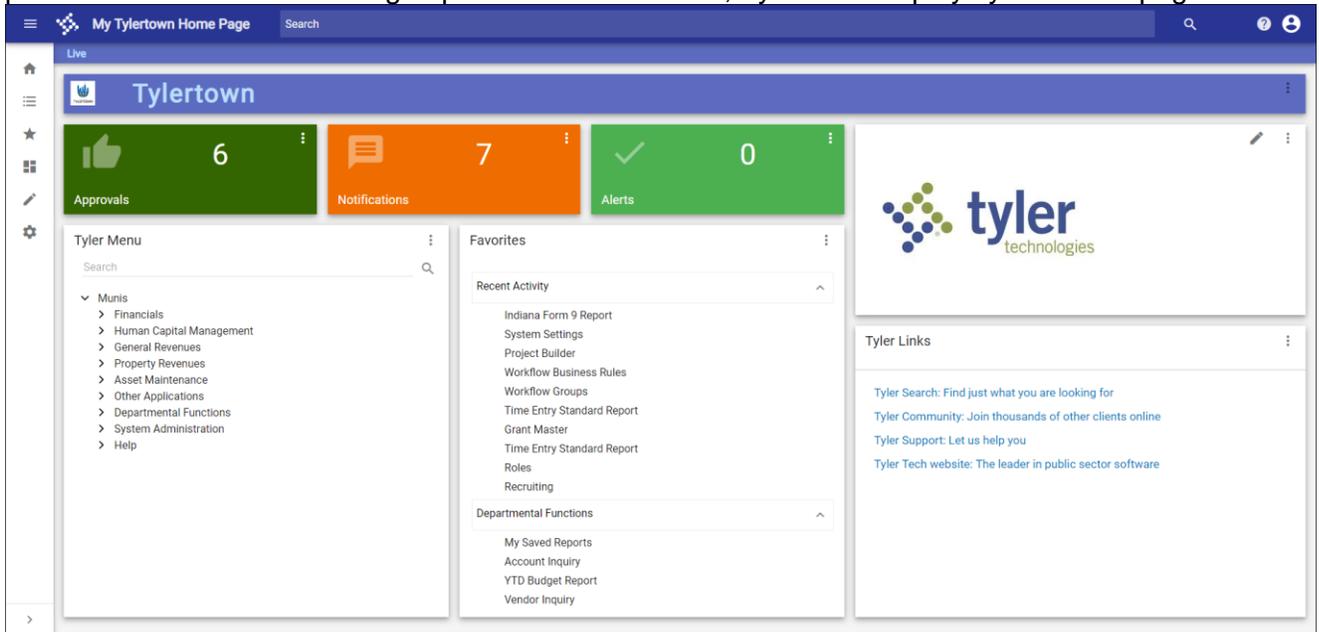


- Click Done to complete the onboarding process. The program generates the Home page. In this case, the Budget Monitoring page is shown as the Home page.

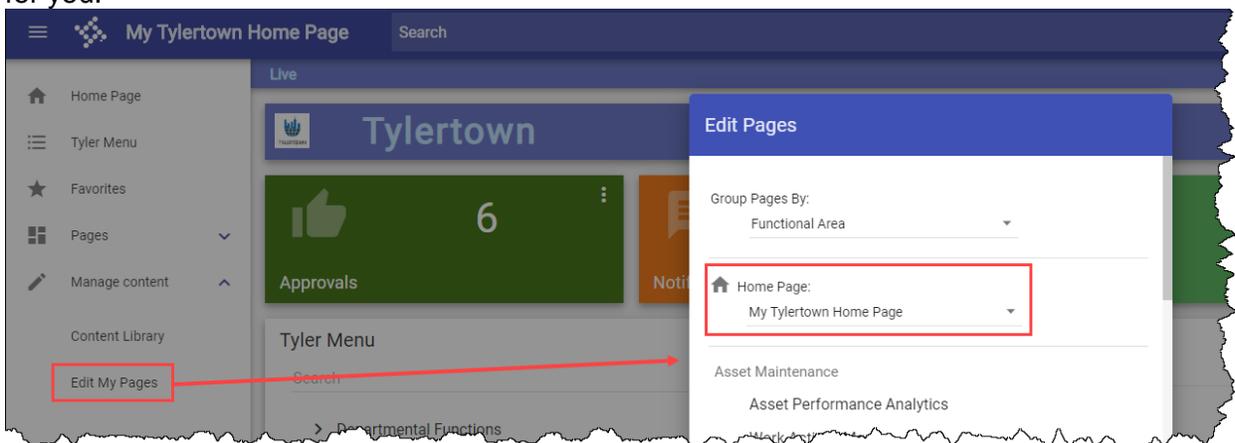


4 HOME PAGE

The Home page provides access to your Tyler menu and other cards that you or your administrator have applied to your Tyler Hub application. When you complete the onboarding process or click the Home Page option from the sidebar, Tyler Hub displays your Home page.



To set any installed page as the Home page, click the Edit My Pages option in the Manage Content group, assign the new Home page from the Home Page drop-down list, and then click Save. If you do not have access to this option, an administrator must reassign the Home page for you.



Available pages vary depending on the products and solutions with which Tyler Hub is configured. The following sections explore some common Home page offerings.

4.1 ENVIRONMENT BANNER

The environment banner displays environment-specific information, such as whether you are using a live, test, or train environment. Administrators can customize the text, font, and color, or hide this banner using the options on the Tyler Hub Administration page. When enabled, the environment banner card is visible on every page (not just the Home page) for all users.



4.2 BANNER CARD

If the banner card is enabled, the system displays it near the top of the Home page. Using the Tyler Hub Administration page, administrators can customize the text—including the font, color, size, and style—and add a logo. This card is identical on all users' Home pages. Unlike the environment banner, the banner card is only visible on the Home page.



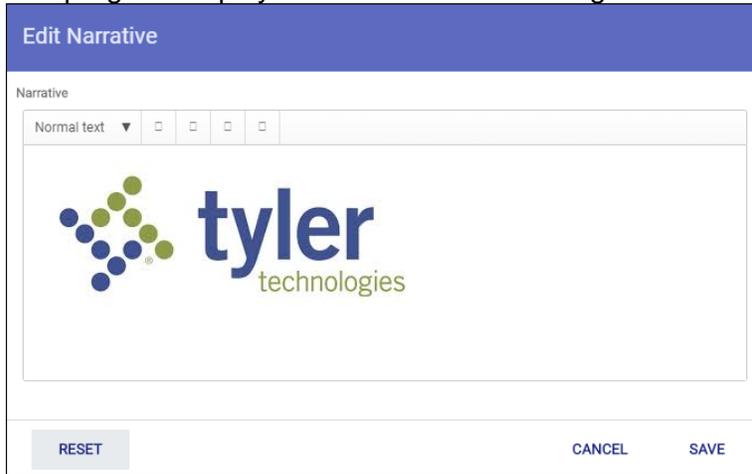
4.3 NARRATIVE CARD

If your Home page includes a Narrative card, you can set it to display your organization's logo or another image. The card supports hosted web images only; you cannot upload images directly or insert images that are saved locally.

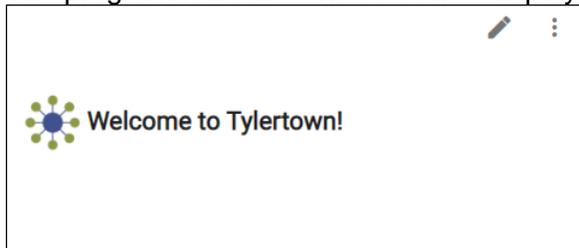


To add an image to a narrative card:

1. Click the Edit option on the card.
The program displays the Edit Narrative dialog box.



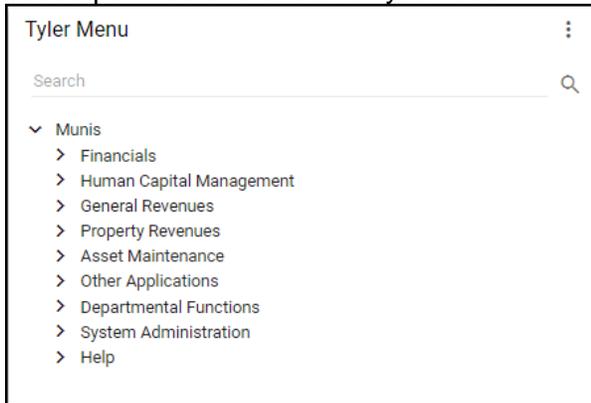
2. Copy and paste the hosted image into the text box.
3. Add any relevant text, using the text options to format it.
4. Click Save.
The program refreshes the screen to display the updated card.



5 TYLER MENU

The Tyler Menu option displays the Tyler menu that is applicable to your organization. For example, if you are a Munis user, the Tyler Menu displays the Munis menu. Additionally, if your organization has integrated other Tyler products, such as ReadyForms or Tyler 311, those options are also included in the menu. The Tyler menu enforces all applicable menu- and role-

based permissions based on your user ID.



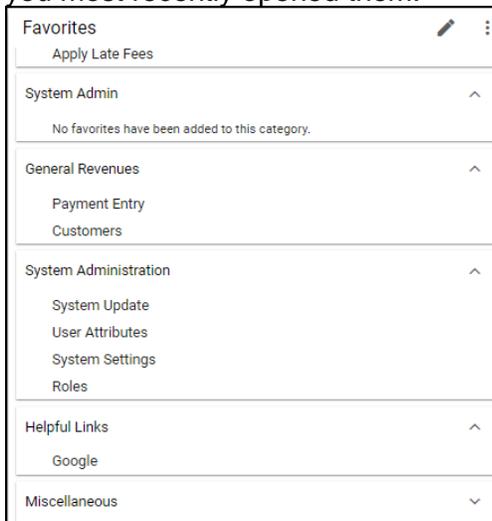
When you enter search criteria in the Search box, the system produces a list of programs that match the defined criteria. Select an option to open that program in your Tyler product.

After entering search criteria, the Search button refreshes to a Cancel button. Click Cancel to clear the entered search criteria.

Click Refresh to close any open menus and clear any currently displayed search results.

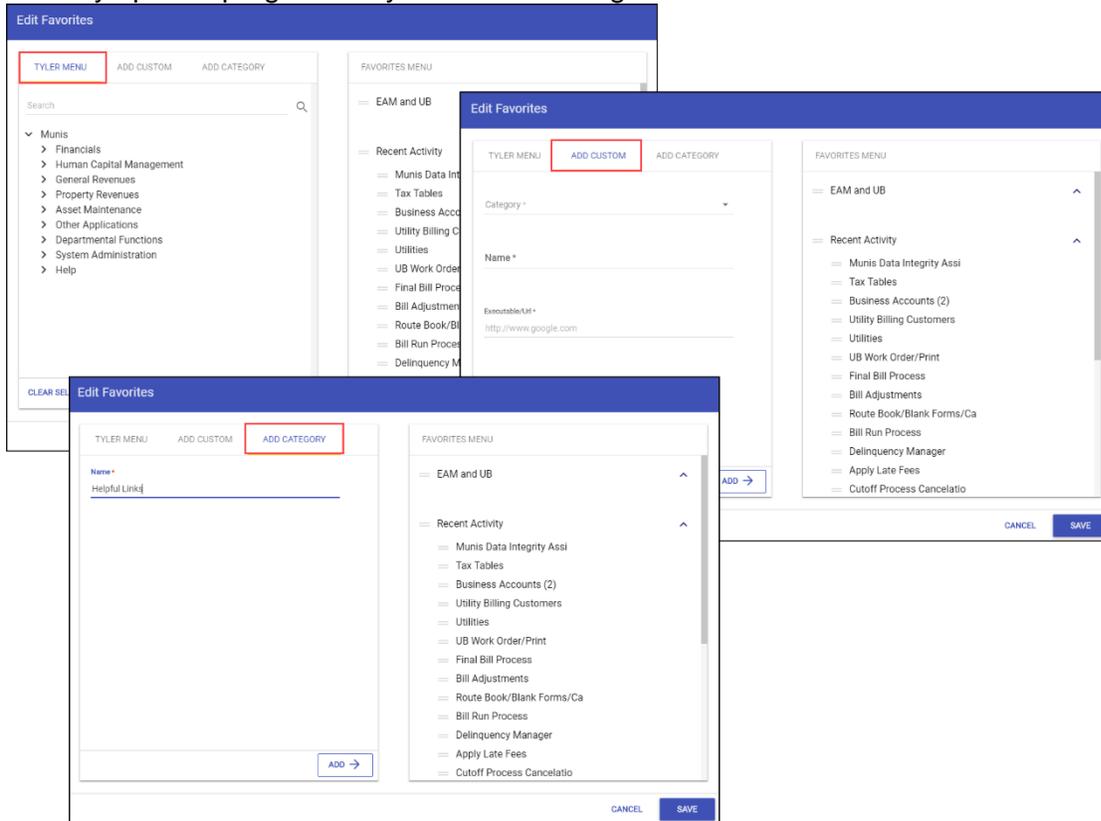
6 FAVORITES

Favorites lists programs and categories you have added to your Favorites menu. It also provides your recently accessed programs in the Recent Activity group, in the order in which you most recently opened them.



The Edit option allows you to add menu programs to your Favorites list, as well as to create custom categories and store links to frequently used websites. Categories group similar programs or websites. For example, creating a Reports category allows you to group the reports you frequently use.

From the Edit Favorites menu, you can rearrange favorites and categories, and quickly add recently opened programs to your defined categories.



6.1 ADDING A MENU PROGRAM

To add a menu program:

1. Click Edit Mode to display the Edit Favorites menu.
2. On the Tyler Menu tab, navigate to the menu program to add.
3. Select the program check box.
4. Select other programs to add, as appropriate.
5. Click Add.

Tyler Hub updates the Favorites Menu to include all the selected programs, automatically adding a product category it is not included in the Favorites Menu.

6.2 ADDING A CATEGORY

To add a category:

1. Click Edit Mode to display the Edit Favorites menu.
2. Click Add Category.
The system displays the Add Category dialog box.

3. Enter the name of the category in the Name field.
4. Click Save.

6.3 ADDING A CUSTOM FAVORITE

To add a website to your Favorites menu:

1. Click Edit Mode to display the Edit Favorites menu.
2. Click the Add Custom tab.
3. From the Category list, assign the website to a category. If you have not created categories, cancel the Add Custom action and click the Add Category tab to create a category.
4. Enter the name of the website in the Name field. This is the name of the link that will appear in your Favorites list.
5. Enter the URL for the website in the Executable/URL field.
6. Click Save to add the entry to your Favorites menu.

6.4 EDITING A FAVORITE OR CATEGORY

To edit a favorite or category:

1. Click Edit Mode to display the Edit Favorites menu.
2. Click the entry to update.
The program displays the Edit Favorites dialog box.
3. Update the available fields, such as the Category, Name, and Executable/URL fields.
4. Click Save.

6.5 DELETING A FAVORITE OR CATEGORY

To delete a favorite or category:

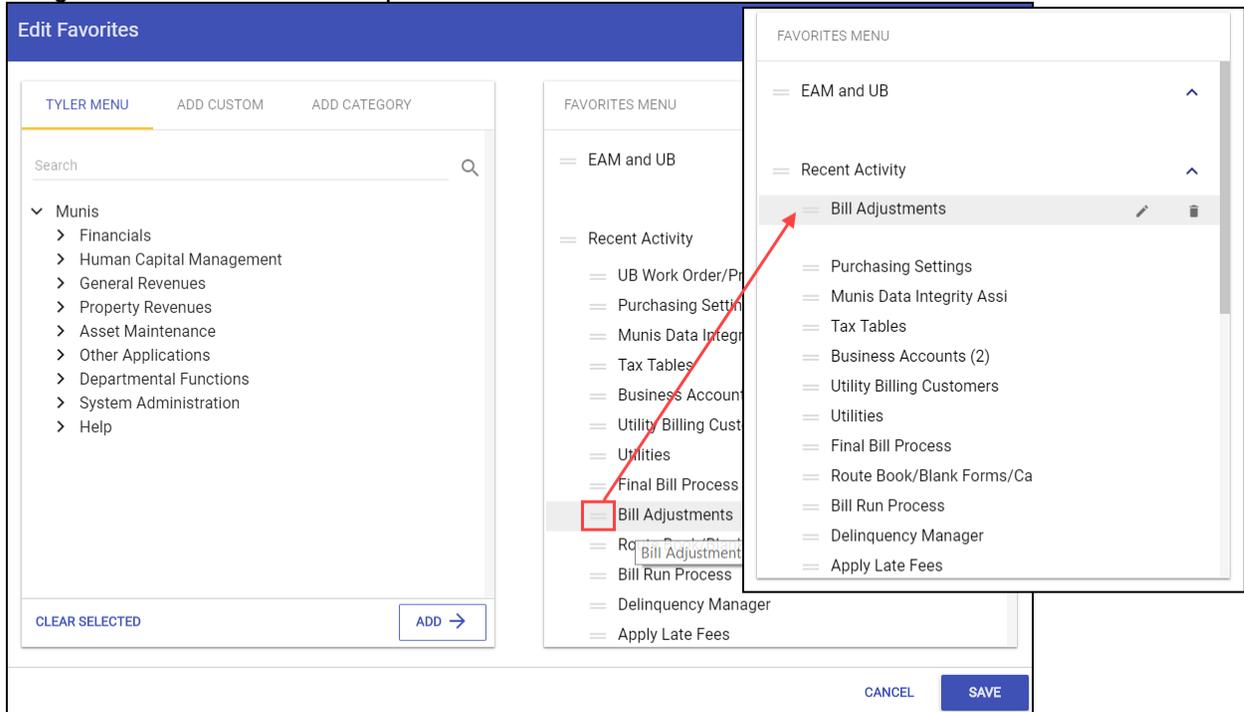
1. Click Edit Mode to display the Edit Favorites menu.
2. In the Favorites Menu group, highlight the entry to delete.
3. Click the Delete button.
The program displays a confirmation message.
4. Click Delete to remove the entry from the Favorites menu.
If you delete a category, all favorites in that category are also removed from the Favorites menu.
5. Click Save.
6. Rearranging Favorites or Categories

6.6 REORGANIZING FAVORITES

To reorder the items on your Favorites menu:

1. Click Edit Mode to display the Edit Favorites menu.
2. Highlight the favorite item to move.

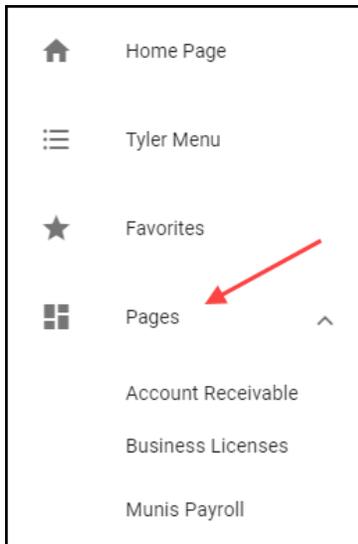
3. Drag the Move icon to a new position.



4. Click Save.

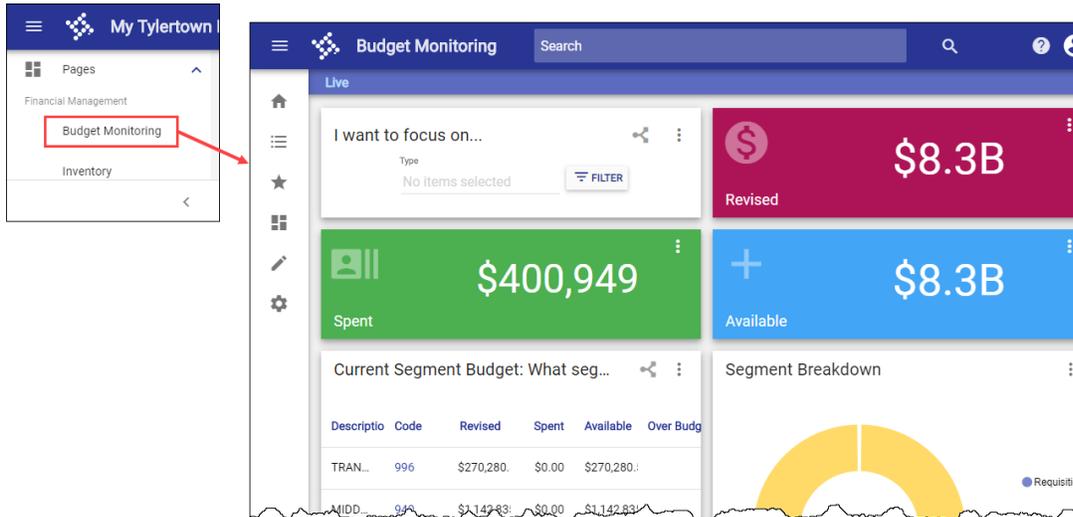
7 PAGES

Pages are groups of cards that contain similar content or that provide a task-based theme. The Pages group of the sidebar features links to all the pages that have been added to your Tyler Hub.

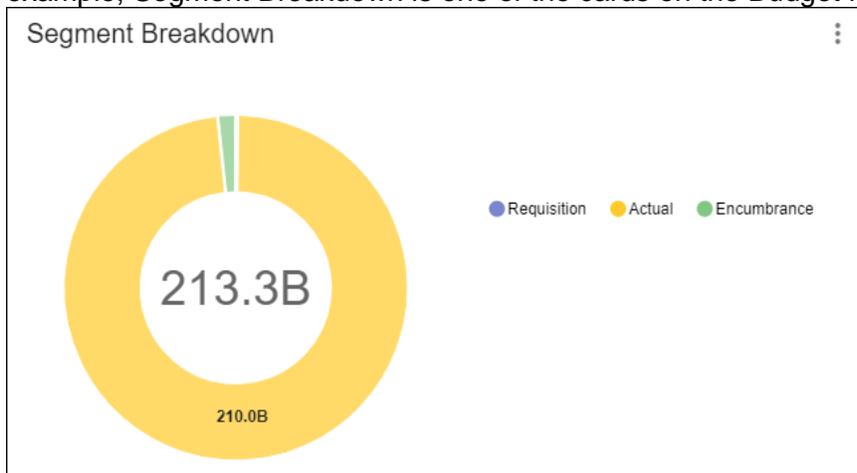


Page groupings in the sidebar are controlled by the Group Pages By setting in the Edit My Pages option in the [Manage Content](#) sidebar group. The Manage Content sidebar group also provides the options for adding, modifying, or publishing pages.

To view a page, expand the Pages group in the sidebar and select the appropriate page.



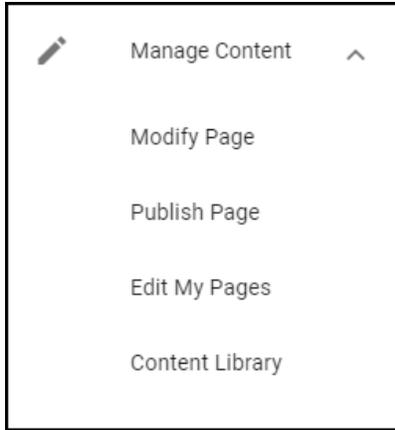
Page content varies, but all pages are made up of cards that summarize and display data. For example, Segment Breakdown is one of the cards on the Budget Monitoring page.



See the [Cards](#) section for specific information on cards.

8 MANAGE CONTENT

The Manage Content group in the sidebar features the Modify Page, Publish Page, Edit My Pages, and Content Library options.



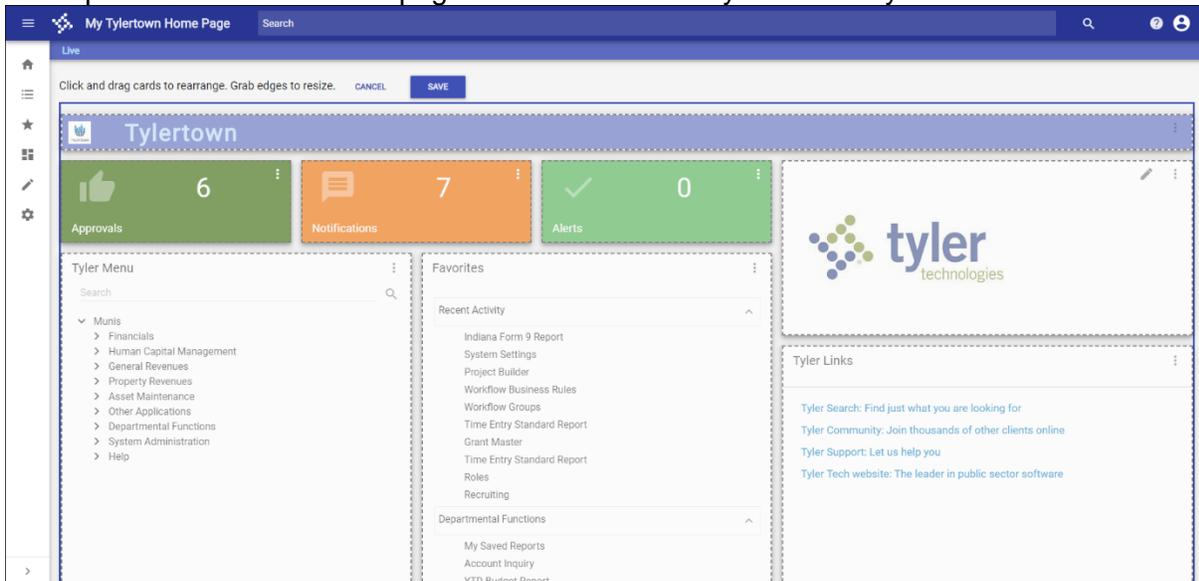
Important! Manage Content options vary according to your user or role permissions. For example, the Publish Page option is not available if your user role does not have permission to publish content.

8.1 MODIFY PAGE

The Modify Page option presents the active page in page layout format. Each card on the page is highlighted, allowing you to resize the card or to change the card's location on the page. The Hub maintains a minimal size requirement for each card to ensure that the information remains legible.

- Click and drag the right side, bottom edge, or lower-right corner of a card to change the size.
- Click a card and drag it to a new location on the page.

This option is not available for pages that have read-only functionality.



8.2 PUBLISH PAGE

The Publish Page option publishes a page to the Content Library where it is available for use by other Hub users. Other users cannot delete pages you add to the Content Library unless they have administrative permissions.

Publish Page to Library

Title *
My Tylertown Home Page

Description 22 / 123
Welcome to Tylertown! This page contains useful cards including the Tyler menu along with the favorites programs and handy links to commonly visited websites.

Select a thumbnail for your page

Lock Page (only I can modify)

Overwrite Page : **"My Tylertown Home Page"**

This page contains data from:

ERP / Financial > Munis > Workflow > Workflow
Tyler Global > Tyler Hub > System > System

Thumbnail Preview



The Lock Page (Only I Can Modify) option allows you to publish pages with read-only functionality. Such pages and the cards on them cannot be modified or published by other users.

The Overwrite Page option is available to replace pages you have previously published. It is not accessible for Tyler pages or the Home page. You cannot overwrite other users' pages unless you have appropriate permissions.

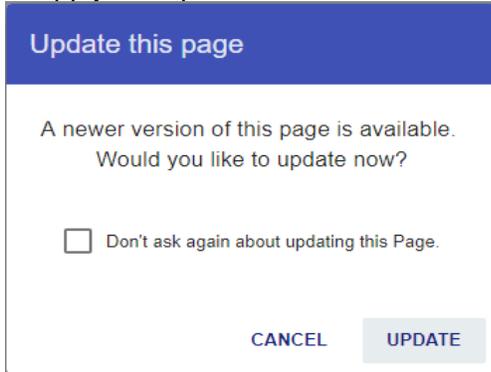
When you select this check box, the Do You Want This Page Automatically Update for Anyone That Has It check box is accessible.

Lock Page (only I can modify)

Overwrite Page : **"My Tylertown Home Page"**

Do you want this page automatically updated for anyone that has it?

If you select this option, users who have added the page receive a notification that a newer version of the page exists and the update is automatically applied. If you do not select this option, users receive a notification that a newer version of the page exists and they can choose to apply the update.

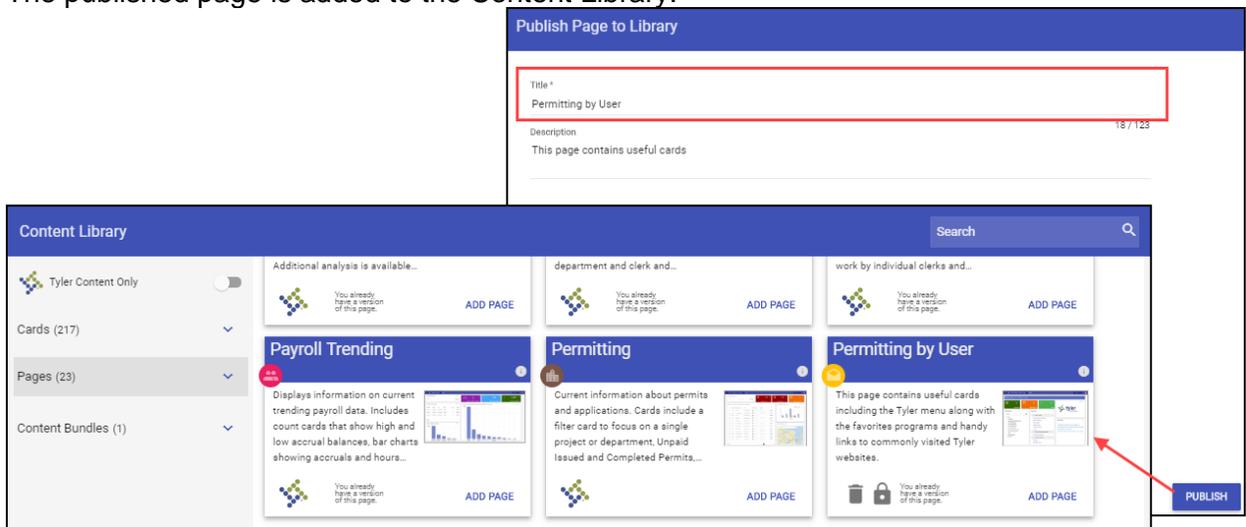


8.2.1 Publishing a Page to the Content Library

When you publish a page to the Content Library, any user can access that page and add it to their collection of Tyler Hub pages.

To publish a page to the Content Library:

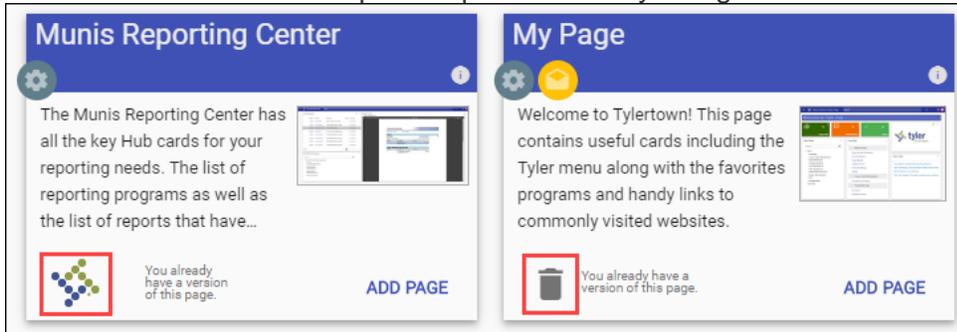
1. From the page to publish, click Publish Page.
The system displays the Publish Page to Library dialog box.
2. Complete the fields as required. A custom thumbnail image is optional.
3. If needed, select the Lock Page check box to prevent other users from modifying the page.
4. Click Publish to publish your page to the Content Library.
The program displays a confirmation message.
5. Click OK.
The published page is added to the Content Library.



When you access the Content Library, the published page is available in the Pages tab, sorted according to the category you defined.

8.2.2 Deleting a Page from the Content Library

Pages can only be deleted from the Content Library by the author of the page and by users with administrative privileges. You cannot delete pages that feature the Tyler logo. Pages that can be deleted show a Delete option in place of the Tyler logo.

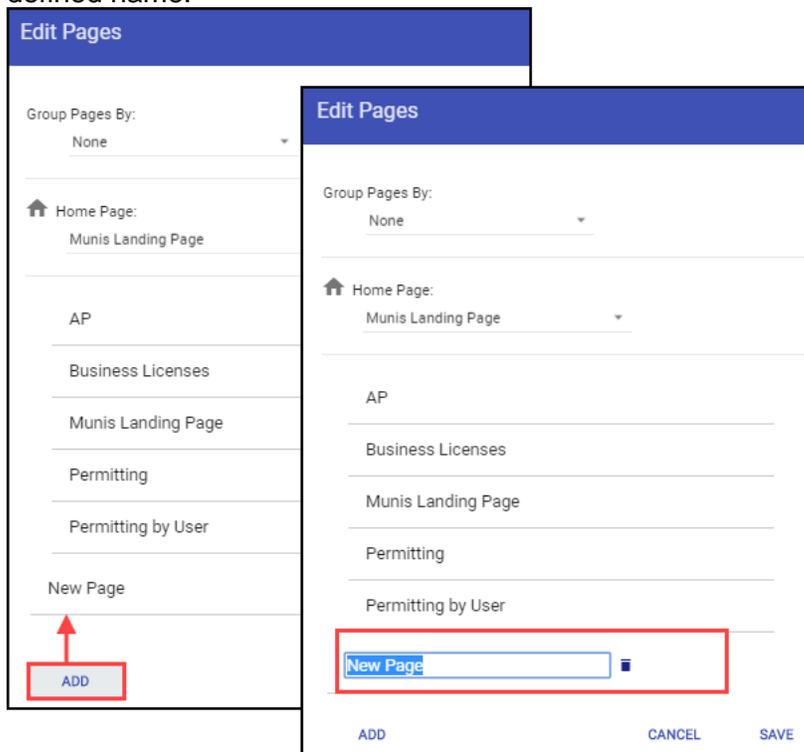


To delete a page, navigate to the page in the Content Library and click the Delete button.

8.3 EDIT MY PAGES

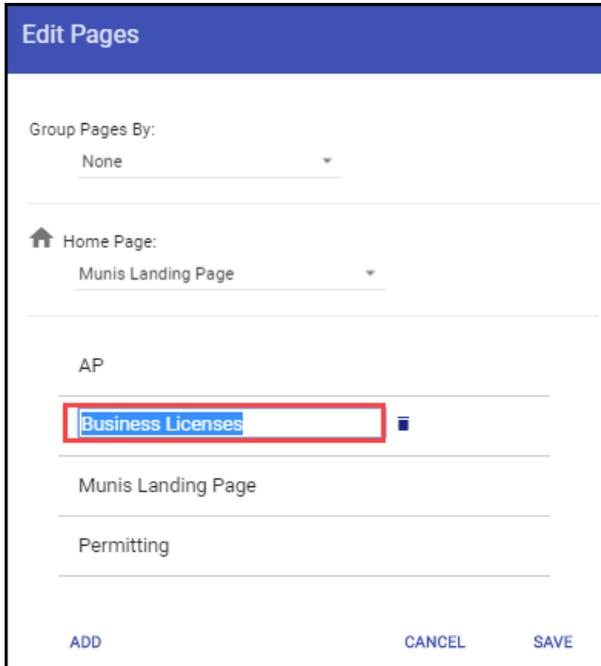
Edit My Pages provides options for modifying pages. Click Edit My Pages to display the Edit Pages dialog box, where you can add, rename, rearrange, and delete pages.

- To create a new page, click Add and then highlight the New Page entry to assign a user-defined name.

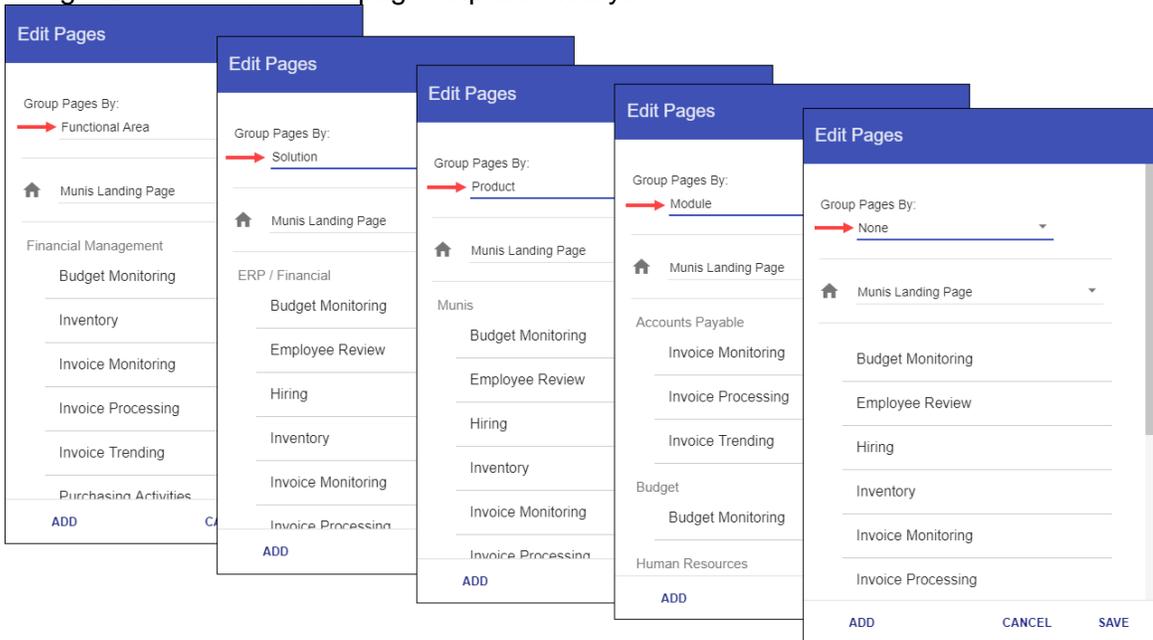


When you click Save, Tyler Hub refreshes to include the page in the Pages group of the sidebar. Use the Content Library options to add cards to the page.

- To rename a page, highlight the page name and update the title. When you customize the names of pages in your personal collection of Tyler Hub pages, the page names remain unchanged in the Content Library unless you publish a version of the page with the new name.



- To reorganize pages, use the Group Pages By list. You can arrange pages by functional area, solution, product, or module. The default option, None, removes all page categorization and lists the pages alphabetically.



- To delete a page, highlight the page and click Delete. Use caution when deleting a page as Tyler Hub does not provide a confirmation message. When you delete a page, the

program removes it from your menu, but keeps it available in the Content Library for other users to access or for you to add again later.

Edit Pages

Group Pages By:
None

Home Page:
Munis Landing Page

AP

Business Licenses

Munis Landing Page

Permitting

ADD CANCEL SAVE

8.3.1 Setting the Home Page

The Edit Pages dialog box includes the Home Page list. Use this list to update your home page.

Edit Pages

Group Pages By:
None

Home Page:
Munis Landing Page

AP

Business Licenses

Munis Landing Page

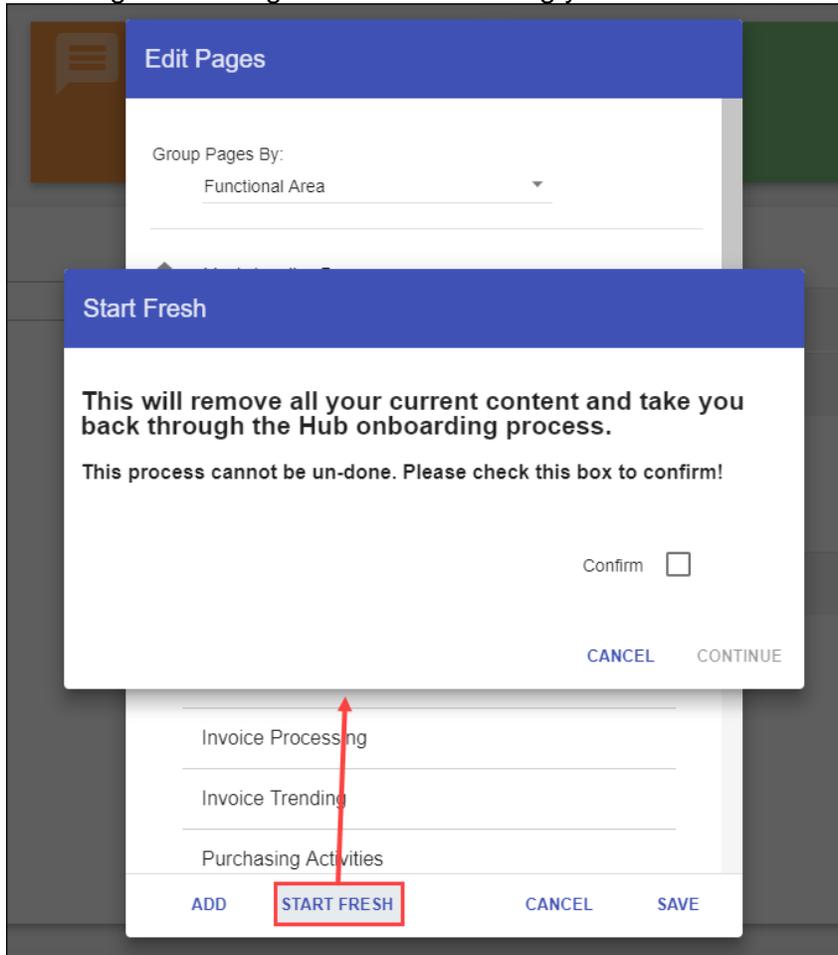
Permitting

Permitting by User

ADD CANCEL SAVE

8.3.2 Restarting Onboarding

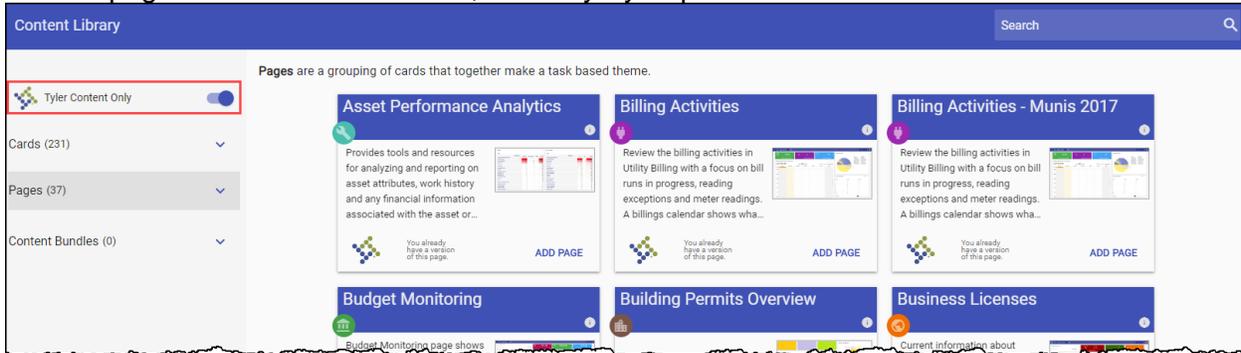
If enabled by your administrator, the Start Fresh option restarts the onboarding process, removing the existing content and allowing you to add content and set a new Home page.



Select the Confirm check box and then click Continue to begin the onboarding process again. Refer to the [Onboarding](#) section for more information.

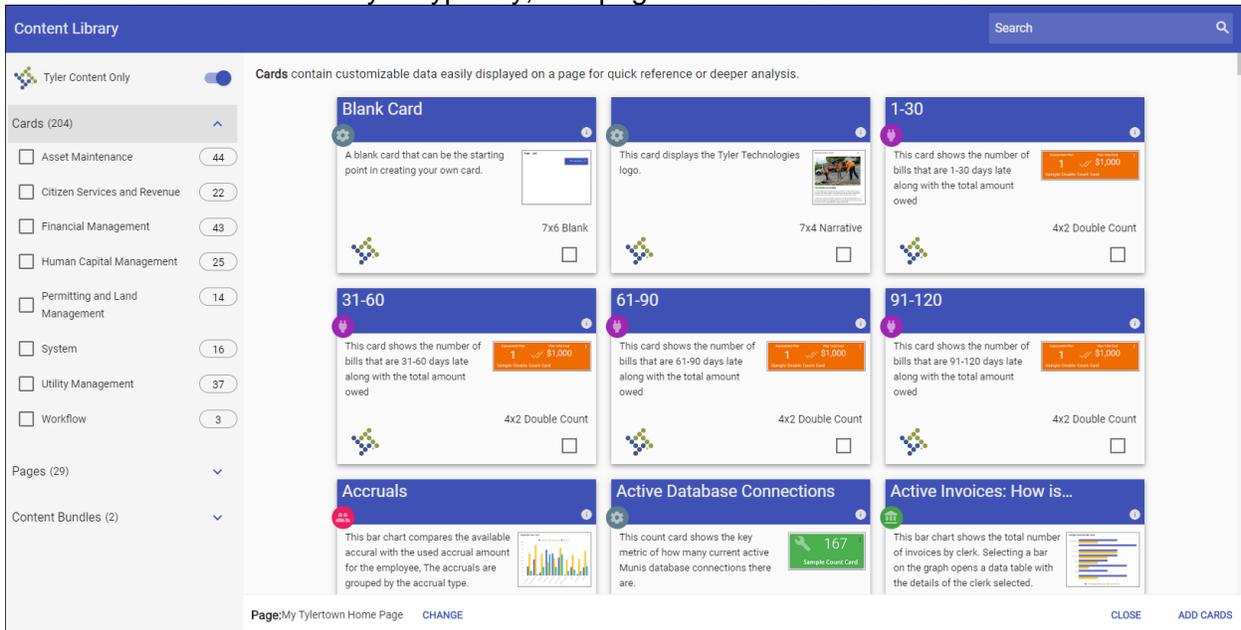
8.4 CONTENT LIBRARY

The Content Library allows you to add pages, cards, and content bundles to your Tyler Hub. You can add custom content that users at your organization have created or out-of-the-box pages and cards provided by Tyler. The Tyler Content Only option determines whether the Content Library displays user-defined pages and cards. When the option is enabled, user-defined pages and cards are hidden, and only Tyler-provided content is shown.



8.4.1 Cards

Cards display data on a page for quick reference or analysis. You can customize the cards to view the data in different ways. Typically, one page includes several cards.



When searching for cards, use the search box to narrow the results or select the check boxes to apply filters based on specific functional areas. For example, choose Human Capital Management to display only the cards related to that area.

Generally, card descriptions include the following:

- The title of the card
- An icon indicating the functional area

- An Information button that displays additional card information, including the card name, description, dataset, content version, and author
- A brief description of the card
- A sample thumbnail image of the visualization
- The card dimensions (for example, 7 by 6)
- The card type
- The Tyler logo, if the card is a default card supplied by Tyler

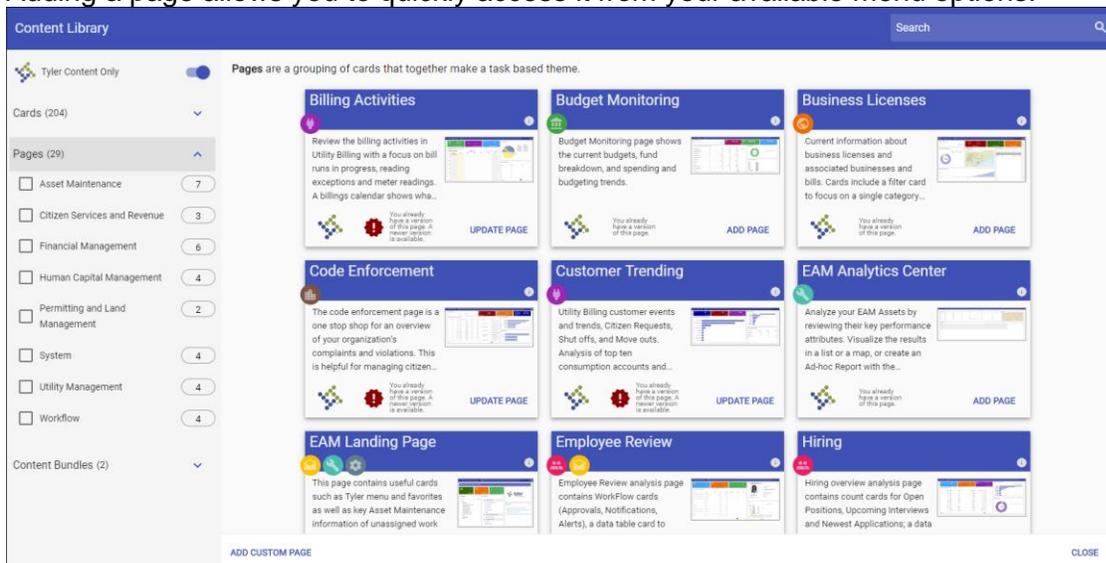
To add cards to a page:

1. From the Cards tab, select the check box for each card to add. Use the filters or the search box to narrow the scope of cards displayed.
2. In the lower-left corner of the tab, confirm that the selected page is the correct page to which to add the card.
3. To add the cards to a different page, click Change and select a new page.
4. Click Add Cards.
The program closes the dialog box and refreshes the page to include the added cards.

8.4.2 Pages

Pages displays groups of associated cards. For published pages, the cards have already been selected and defined, but you can customize them after you add them to your Tyler Hub. Use the search box to narrow the results or select the check boxes to apply filters for different modules.

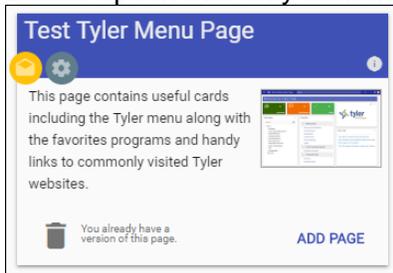
Adding a page allows you to quickly access it from your available menu options.



For each page, click the Information button to display the Page Information dialog box, which provides:

- The title of the page
- An icon indicating the functional area
- An Information button that displays additional page information, including the page name, description, content version, and author
- A brief description of the page
- A sample thumbnail image of the page
- The Tyler logo, if the page is a default page supplied by Tyler
- Information indicating you already have a version of that page, if applicable
- An Add Page option for adding the page

For custom pages that users have added to the Content Library, the Tyler logo is replaced by a Delete option that only authorized users can access.



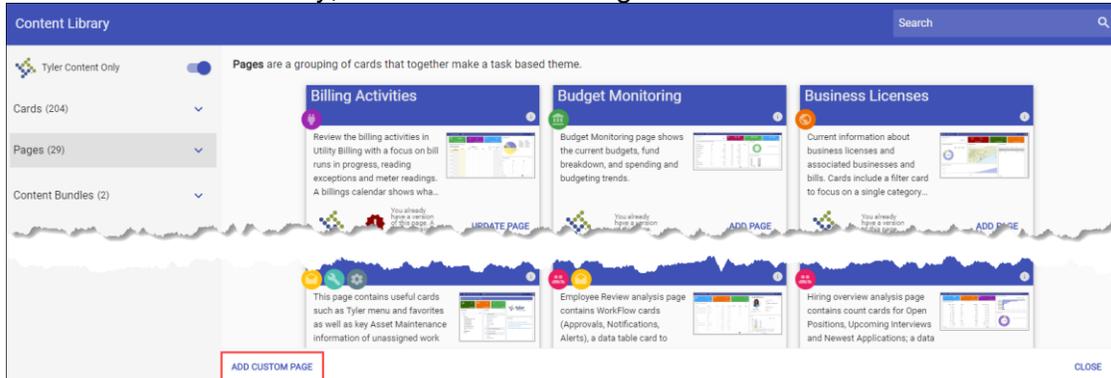
To add a page to your Tyler Hub:

1. From the Pages tab, click Add Page on the page to add.
The Add Page button updates to Page Added, and the system displays a status message.
2. Continue adding pages as needed.
3. Click Close to exit the Content Library dialog box.
The program refreshes to display the most recently added page.

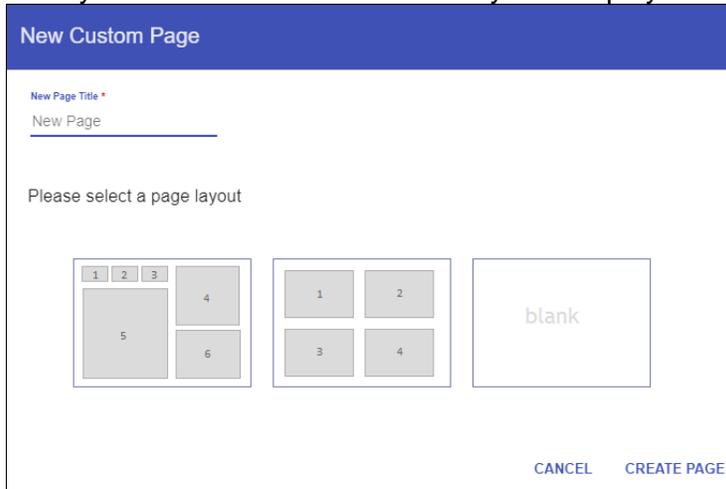
Administrators and users with access to the Card Designer can create custom pages.

To add a custom page:

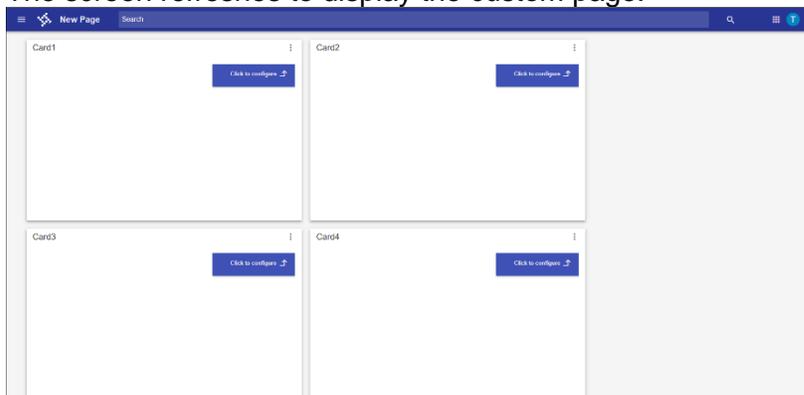
1. From the Content Library, click Add Custom Page.



- The system closes the Content Library and displays the New Custom Page dialog box.



- Enter the page title.
 - Select a layout option.
 - Click Create Page.
- The screen refreshes to display the custom page.



- To set up each card on the page, click the More button (⋮), select Card Designer, and enter the required configurations. For information about using the Card Designer, refer to the [Using Card Designer](#) section of this document.

8.4.3 Content Bundles

Content bundles are user-defined collections of pages and their associated cards. Click the Content Bundles tab to view the available bundles. Use the arrows to show or hide the contents of each bundle.

To apply a content bundle:

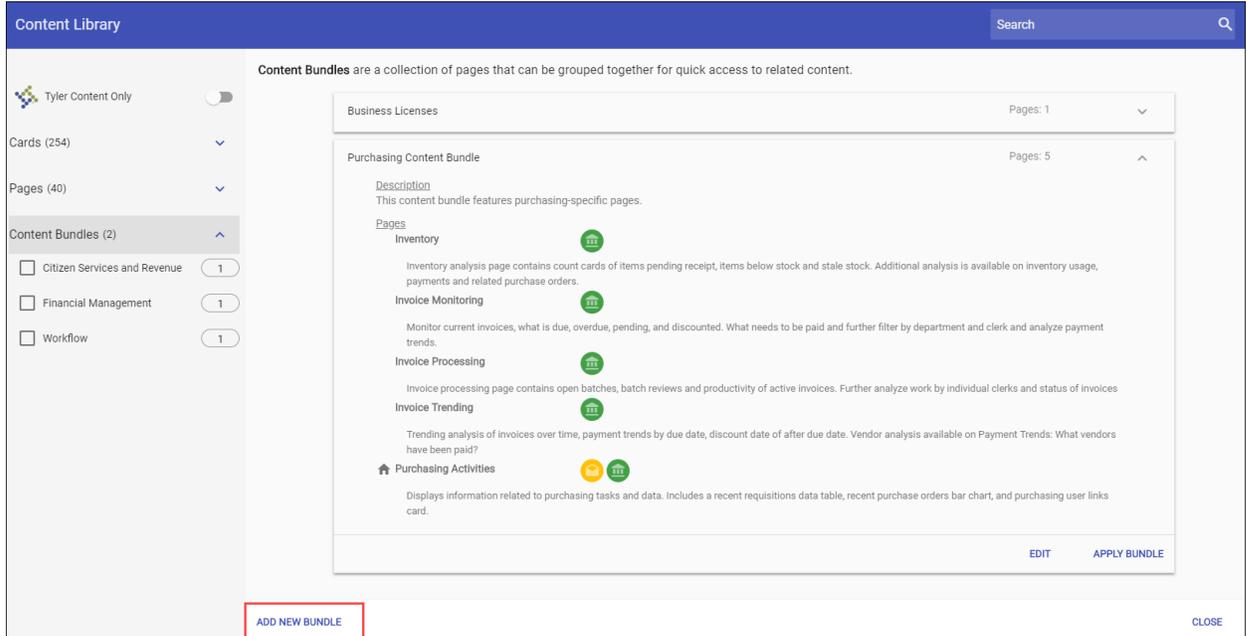
- From the Content Bundles tab, determine the content bundle to apply, using the arrows to show or hide information about the pages included in each bundle.
- Click Apply Bundle to add a content bundle.
- Click Close to exit the dialog box.
Tyler Hub refreshes to display the applied content.

8.4.3.1 Creating a Content Bundle

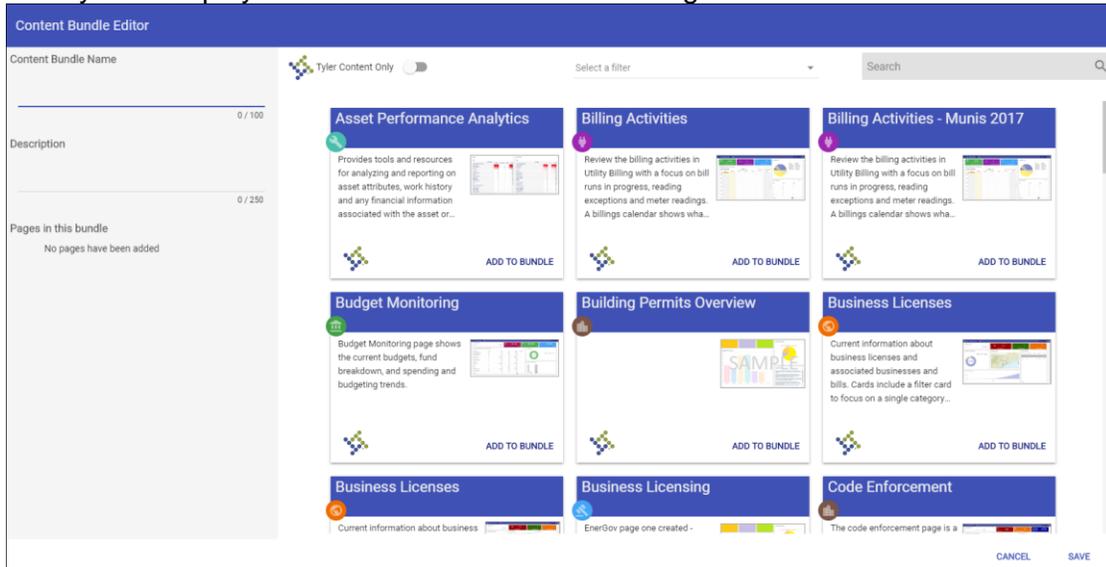
If you have the appropriate permission, you can create content bundles that other users can add to their Tyler Hub environments.

To add a new content bundle:

1. From the Content Bundles tab, click Add New Bundle.



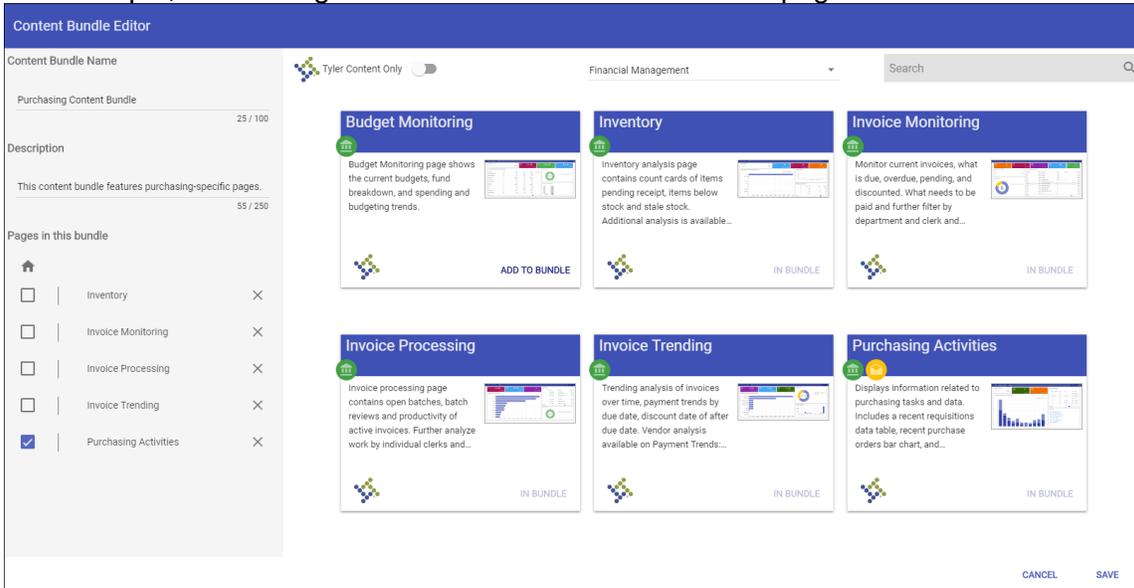
The system displays the Content Bundle Editor dialog box.



2. Enter a name for the bundle in the Content Bundle Name field.
3. Enter a description for the bundle in the Description field.
4. Click the Add to Bundle option for each page to add to the bundle. You can enable the Tyler Content Only option to limit the results to pages that have been supplied by Tyler and

exclude any user-created pages. Use the Select a Filter list to apply filters to narrow the results.

- From the Pages in This Bundle group, select the page to designate as the Home page. In this example, Purchasing Activities is selected as the Home page.

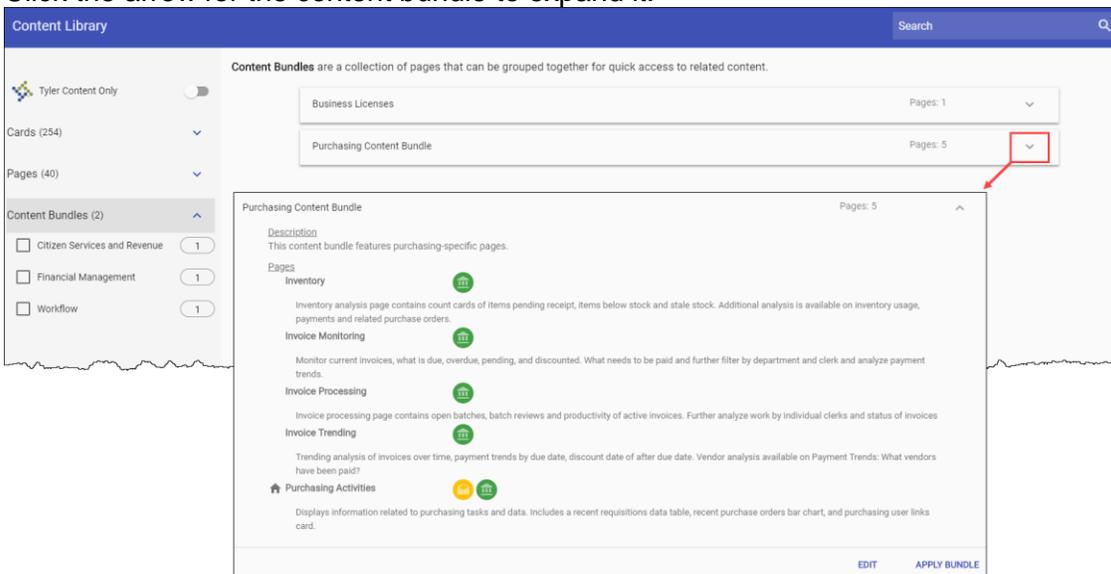


- Click Save. The content bundle is added to the Content Bundles tab in the Content Library.

8.4.3.2 Editing a Content Bundle

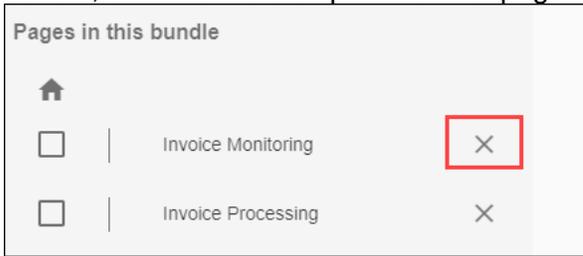
To edit a content bundle:

- Click the Content Bundles tab.
- Click the arrow for the content bundle to expand it.



- Click Edit. The program displays the Content Bundle Editor dialog box.

4. Make the changes to the content bundle as needed. To delete a page from the content bundle, click the Delete option for that page in the Pages in This Bundle group.



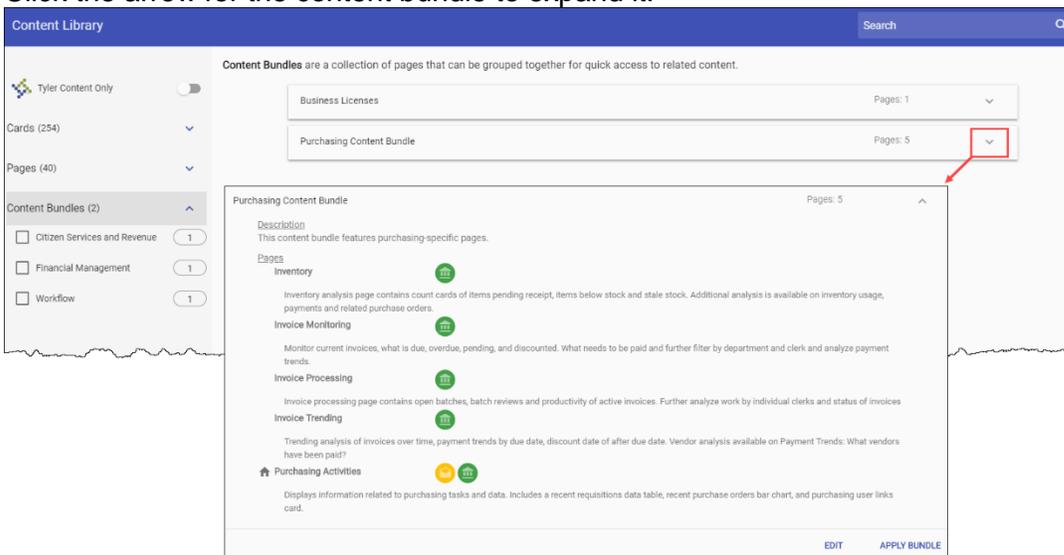
5. Click Update to save the changes.

8.4.3.3 Deleting a Content Bundle

If you have appropriate role permissions, you can delete content bundles.

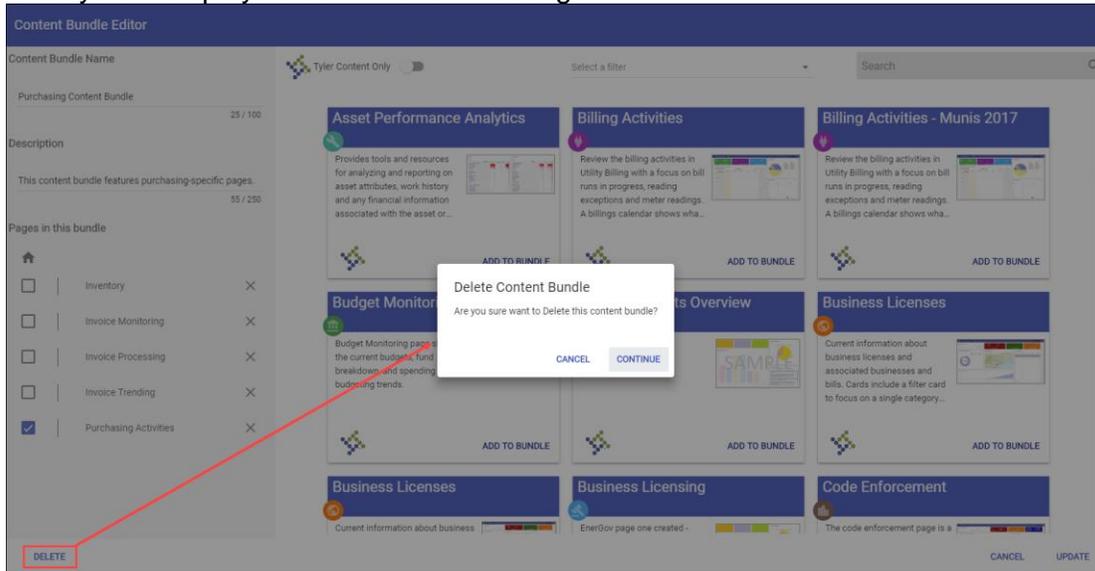
To delete a content bundle:

1. Click the Content Bundles tab.
2. Click the arrow for the content bundle to expand it.



3. Click Edit.
The program displays the Content Bundle Editor dialog box.

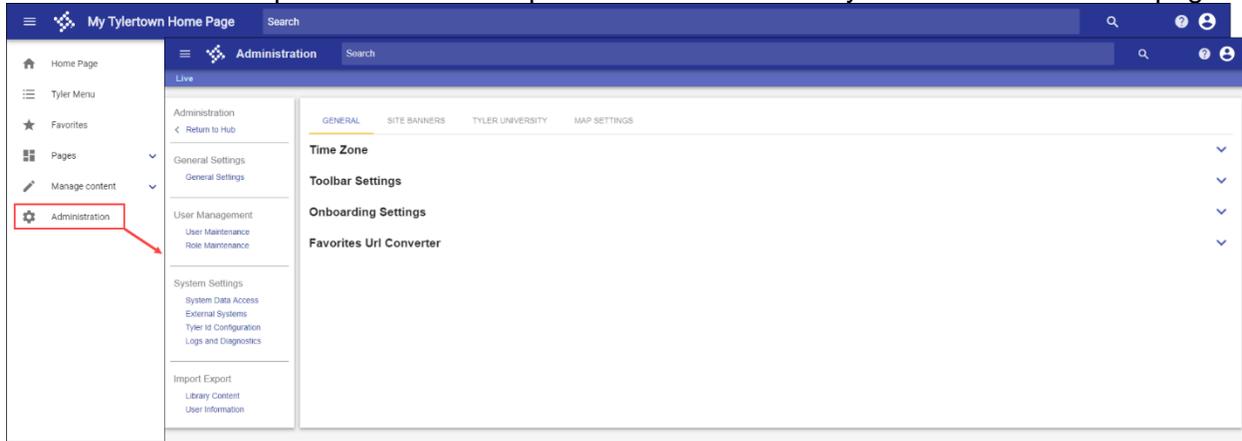
- Click Delete.
The system displays a confirmation message.



- Click Continue to proceed with deleting the content bundle.
The content bundle is removed.

9 ADMINISTRATION

The Administration option in the sidebar provides access to the Tyler Hub Administration page.



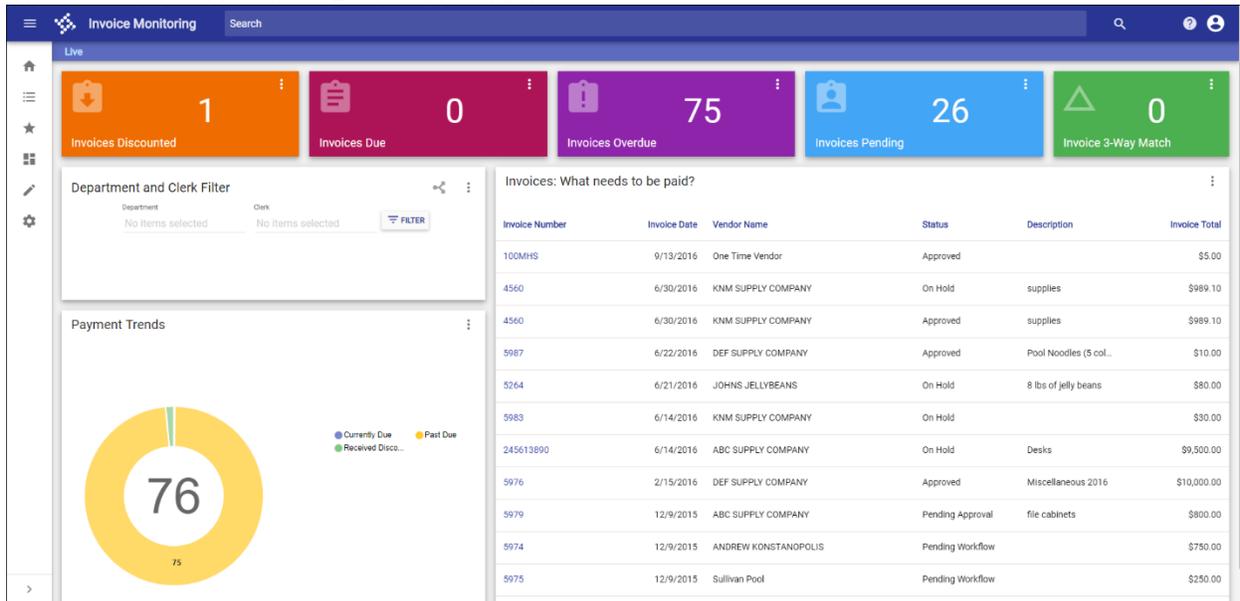
Only users with administrative access have access to this option. For most users, this option is not available.

The Tyler Hub Administration page is where administrators can establish and maintain settings related to system-wide processes, such as diagnostics, users, roles, data access, Tyler University, banners, maps, external systems, and Tyler Identity. Only administrators can access this page.

Refer to the *Tyler Hub Administration Guide* document found in the Tyler Hub group of Tyler Community for more information about the Administration page.

Appendix A—Cards

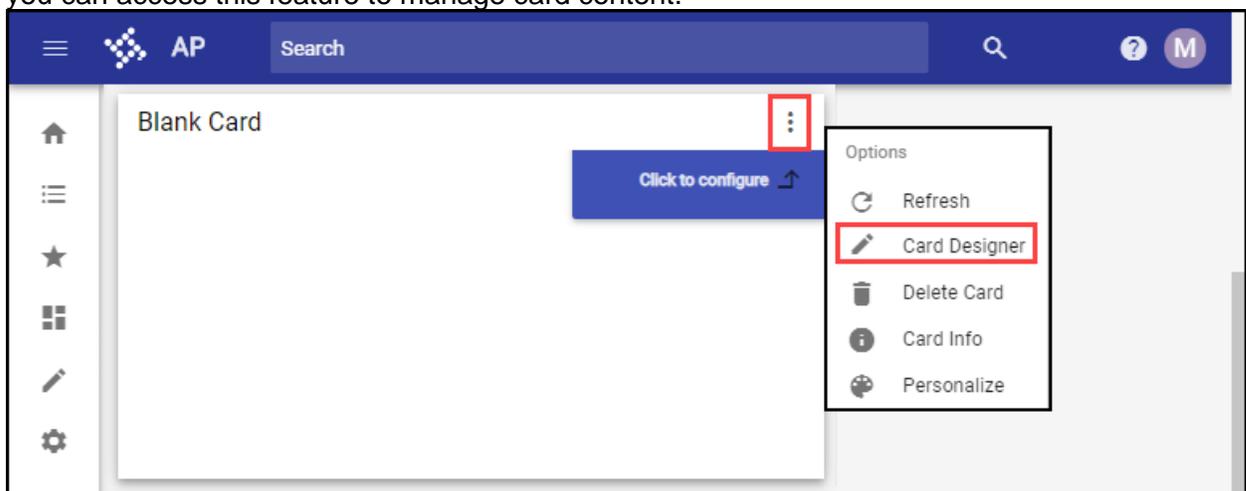
Cards summarize and display data on pages. For example, the Invoice Monitoring page features several cards, including the Invoices Discounted, Invoices Due, Invoices Overdue, Invoices Pending, Invoice 3-Way Match, Department and Clerk Filter, Payment Trends, and Invoices: What Needs to Be Paid? cards.



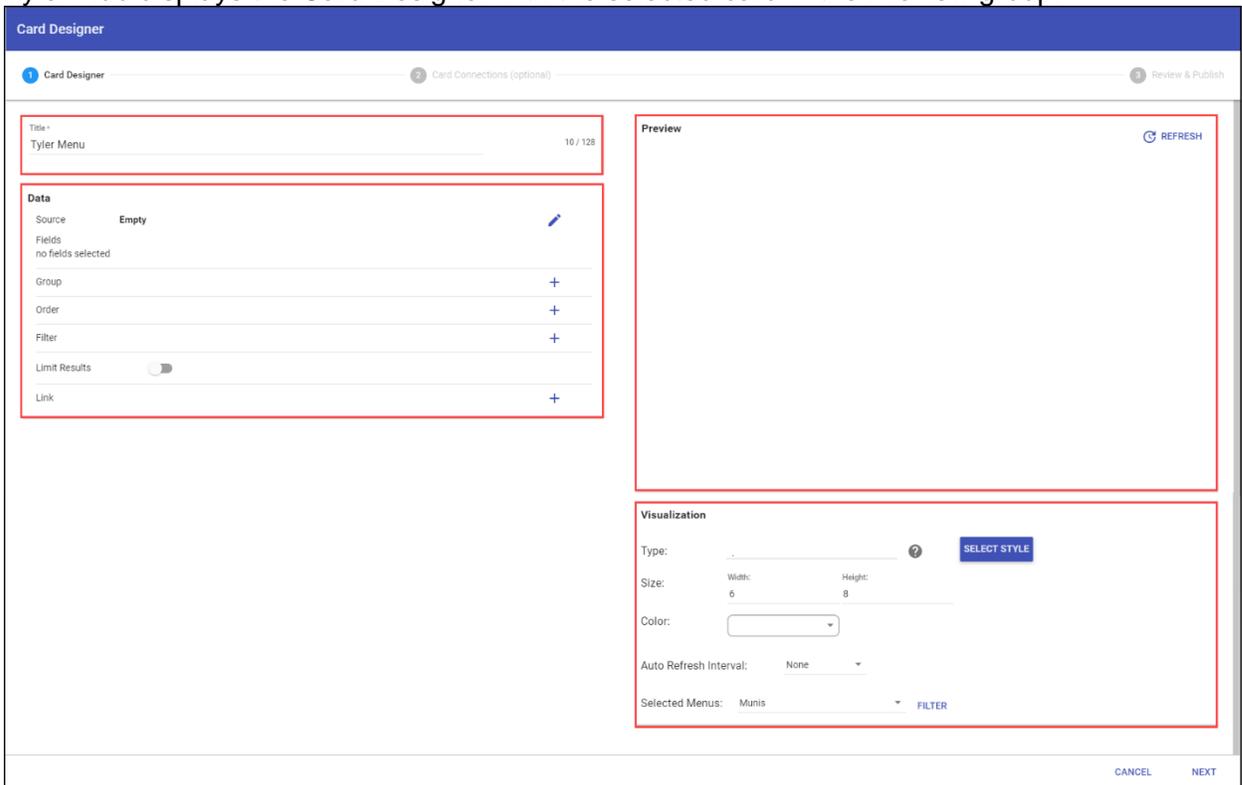
This appendix provides some basic features for managing card content in your Tyler Hub application. See the Tyler Hub group of Tyler Community for more detailed documentation on cards.

USING THE CARD DESIGNER

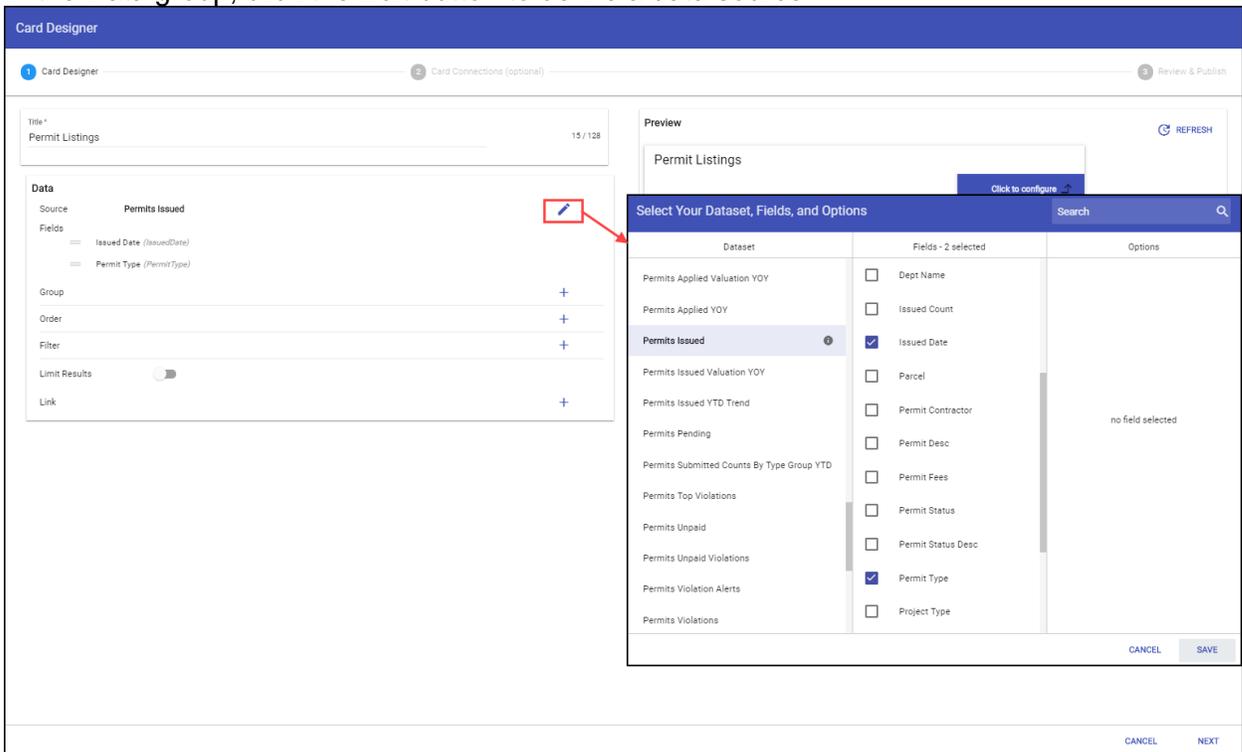
1. On the active page in Tyler Hub, navigate to the card added.
2. Click the More button to expand the menu and then click Card Designer. The Card Designer is typically restricted to system administrators. However, with the appropriate permissions, you can access this feature to manage card content.



Tyler Hub displays the Card Designer with the selected card in the Preview group.



3. In the Title group, assign a name to the card.
4. In the Data group, click the Edit button to define a data source.



- Expand the Group, Order, and Filter, and Link options to apply features to the card.

Data

Source **Permits Issued** ✎

Fields

- ≡ Issued Date (*IssuedDate*)
- ≡ Permit Type (*PermitType*)

Group +

- ≡ Address ▼ Display Name* Address 🗑

Order +

- ≡ Address ▼ Ascending Descending 🗑

Filter +

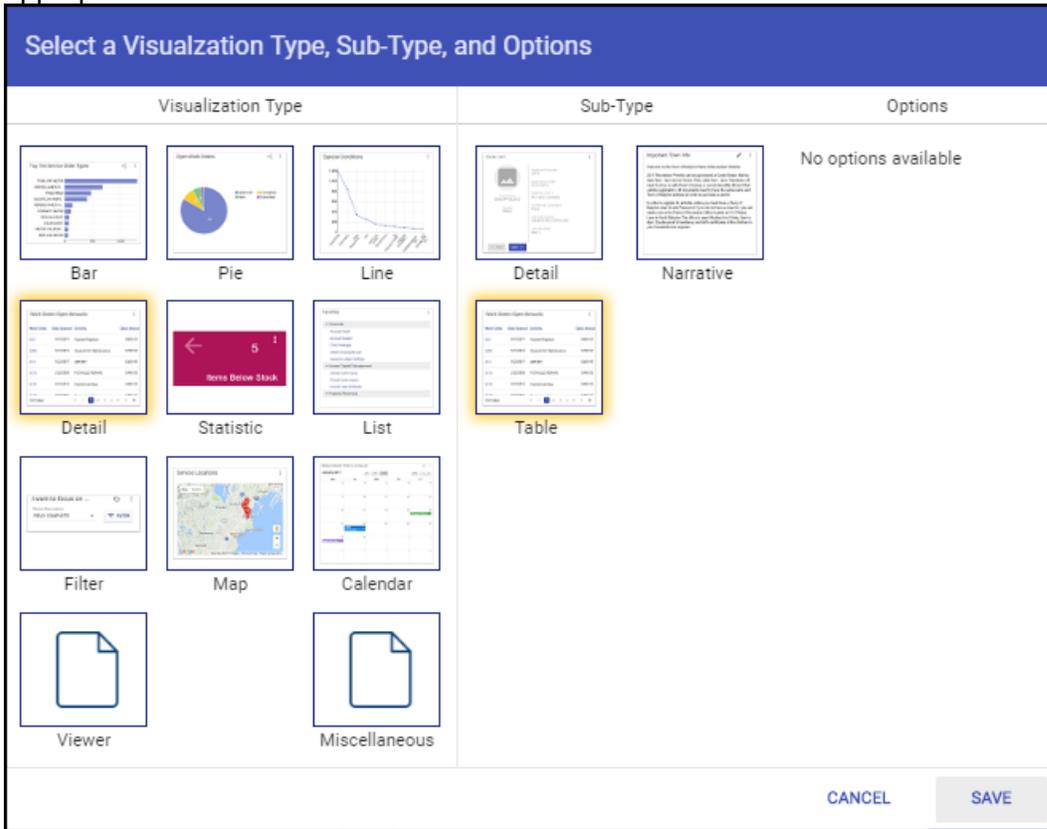
- ≡ Address ▼ = Value ▼ 🗑

Limit Results

Link +

- To limit the number of results that display for a search, set the Limit Results button to active and then assign a maximum number of results.
- Click Link to add one or more links to the card. See the [Adding Links to Cards](#) section for more information.

- In the Visualization group, click Select Style to specify the card type and subtype, as appropriate.



- Define the card size, color, and automatic data refresh intervals.
- For menu cards, use the Select Menu list to specify the menu to display. Once you have selected the menu, use the Filter option to define the menu options that are available to users.

11. Click Refresh in the Preview group to review the card.

The screenshot shows the 'Card Designer' interface. The top navigation bar includes three steps: '1 Card Designer' (active), '2 Card Connections (optional)', and '3 Review & Publish'. The main area is divided into two columns. The left column contains configuration options for the card:

- Title:** Permit Listings (15 / 128 characters)
- Data:** Source is 'Permits Issued'. Fields include 'Issued Date (IssuedDate)' and 'Permit Type (PermitType)'. A group is defined with 'Address' as the display name. The order is 'Address' in ascending order. A filter is set for 'Address' equal to a value.
- Limit Results:** A toggle switch is turned off.
- Link:** A plus sign indicates a link can be added.

 The right column contains a 'Preview' section with a 'REFRESH' button. Below the preview is a 'Visualization' section where the type is 'Table', width is 7, height is 6, and the color is yellow. An 'Auto Refresh Interval' slider is set to 0 minutes. At the bottom right are 'CANCEL' and 'NEXT' buttons.

12. Click Next.

The program displays the optional Card Connections step.

The screenshot shows the 'Card Designer' interface at the '2 Card Connections (optional)' step. The top navigation bar now shows '1 Card Designer' as completed and '2 Card Connections (optional)' as active. The main area is divided into two columns. The left column contains configuration options for card connections:

- Connections:** A plus sign indicates a new connection can be added. The configuration shows: From Card: Permit Listings, Field: ZIP; Connection: Filter, Operator: Equal; To Card: Permit Listings, Field: ZIP.
- Query Levels:** A plus sign indicates a new level can be added. Two levels are shown: '* Level: 1' and 'Level: 2'.

 The right column contains a 'Preview' section with a 'REFRESH' button and the text 'REFRESH to view the card preview'. At the bottom left is a 'PREVIOUS' button, and at the bottom right are 'CANCEL' and 'NEXT' buttons.

- Click Next to proceed to the final step.
The program displays the Review & Publish step.

The screenshot displays the 'Card Designer' interface in the 'Review & Publish' step. The top navigation bar includes 'Card Designer', 'Card Connections (optional)', and 'Review & Publish'. The main content area is split into two columns. The left column, titled 'Card Details', contains the following information:

- Title ***: Permit Listings (15 / 128 characters)
- SubTitle**: (empty)
- Footer Text**: (empty)
- Description**: A blank card that can be the starting point in creating your own card.
- This card contains data from:** ERP / Financial > Munis > Permitting and Land Management > Permits
- Dataset:** Permits Issued

 Below the 'Card Details' is the 'Publishing Preferences' section:

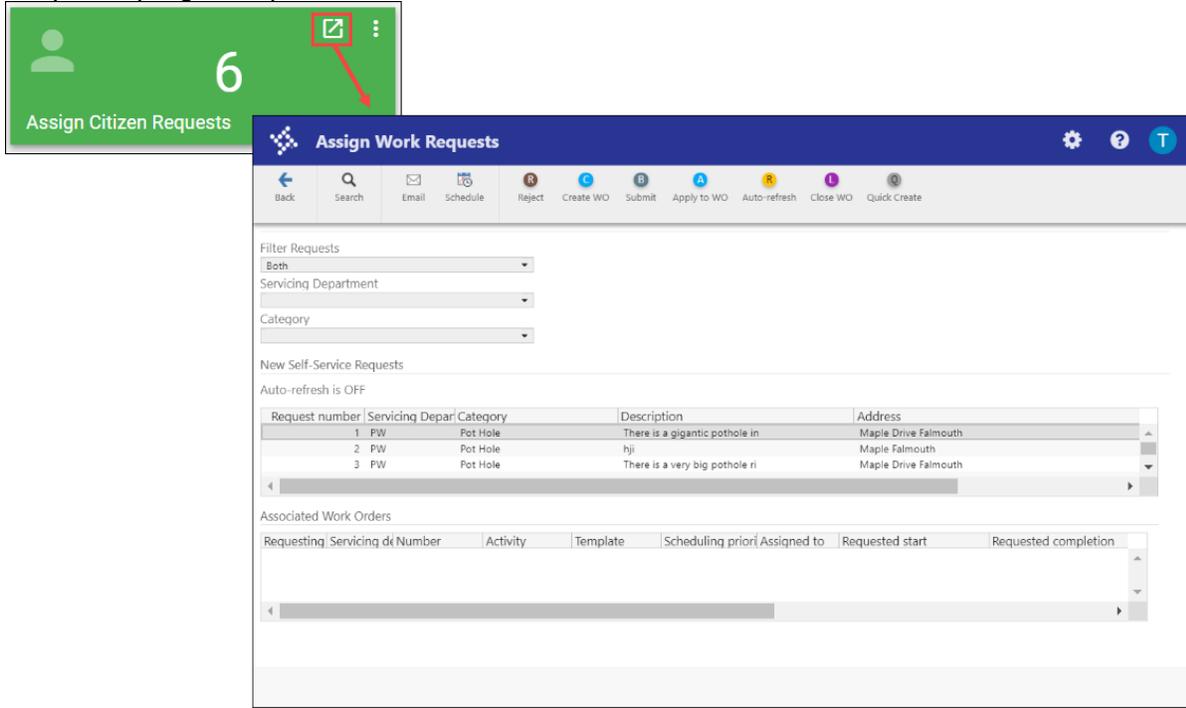
- Save to: AP
- Publish to Content Library
- Overwrite card:
- Do you want this card automatically updated for anyone that has it?

 The right column, titled 'Preview', is currently blank and contains a 'REFRESH' button with the text 'REFRESH to view the card preview'. At the bottom of the interface are three buttons: 'PREVIOUS', 'CLOSE', and 'SAVE'.

- Review the card information and then define the publishing preferences.
If you have specified a value for the Auto Refresh Interval list on the initial Card Designer page and you have selected the Publish to Content Library check box on the Review & Publish page, the card is updated in the Content Store.
- Click Save.
The program closes the Card Designer and refreshes the page.

ADDING LINKS TO CARDS

When you click the Launch button from selected cards, a designated program opens. For example, when you click the option on the Assign Citizen Requests card, the Assign Work Requests program opens in Munis.

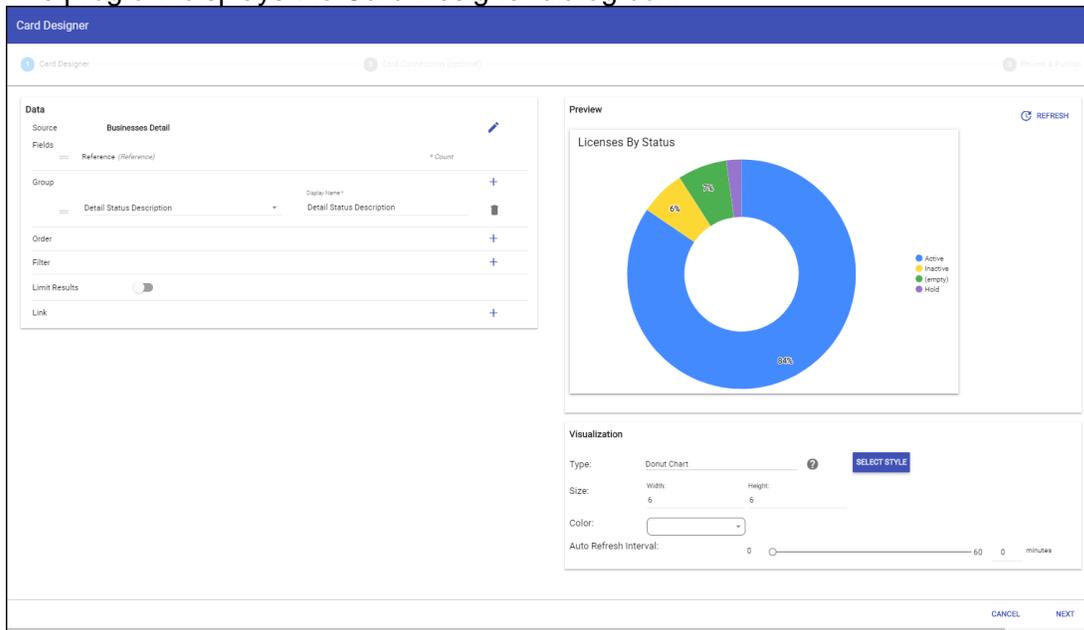


You can add links to other programs, Hub pages, or custom URLs using the Card Designer.

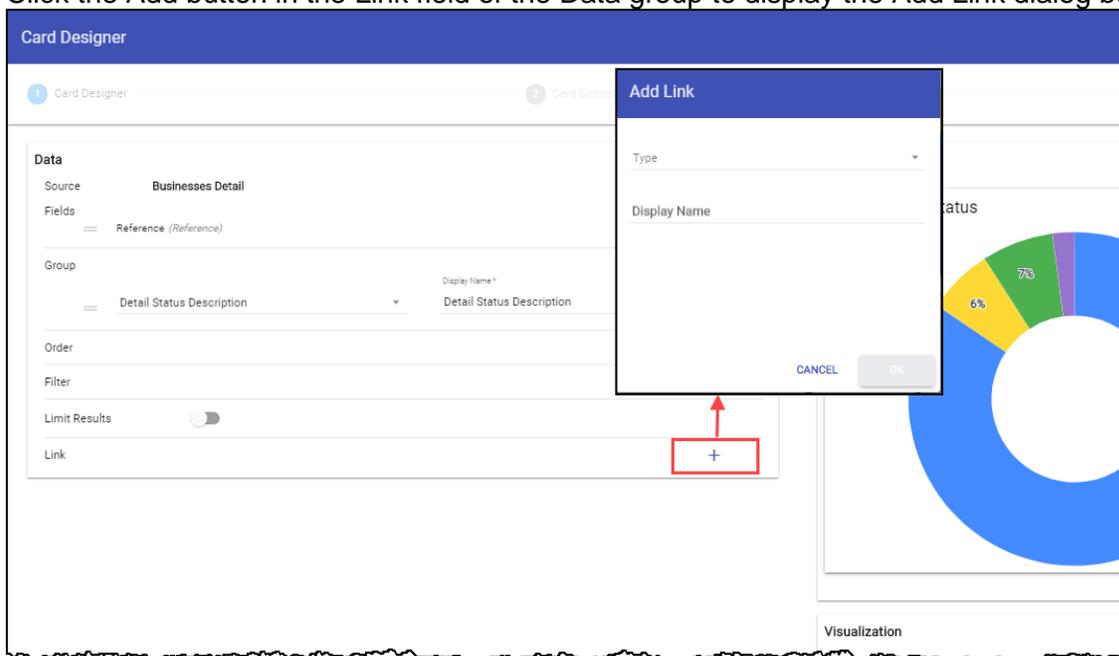
To add links to a card:

1. Click the More button on the card and then select Card Designer.

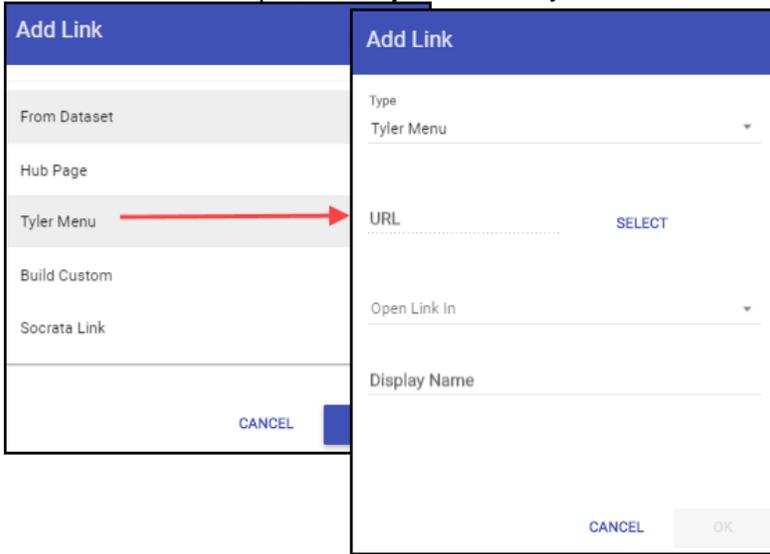
The program displays the Card Designer dialog box.



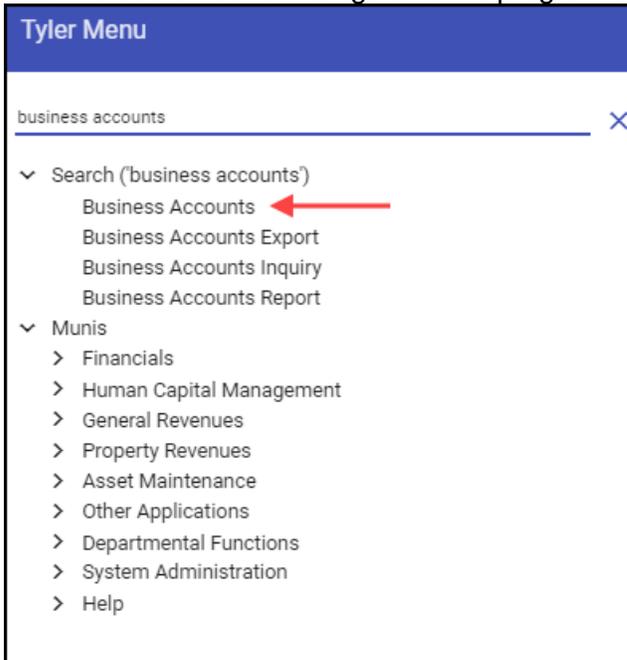
2. Click the Add button in the Link field of the Data group to display the Add Link dialog box.



- Choose an option from the Type list. The option you select determines the link fields that are available. For example, when you select Tyler Menu, the URL field is available.



- Click Select.
- The system displays the Tyler Menu.
- Use the Search bar or navigate to the program and select it from the menu.



The program returns to the Add Link dialog box.

- From the Open Link In list, specify if the link should open in a new window, tab, or dialog box. The options for this list vary according to the option you select from the Type list. The Open Link In list is not available when you select Hub Pages from the Type list.

Add Link

Type
Tyler Menu

URL
blmaster SELECT

Open Link In
New Tab

Display Name
Business Accounts

CANCEL OK

- Click OK to close the Add Link dialog box. The Link group displays the additional link.

Card Designer

1 Card Designer — 2 Card Connections (optional)

Data

Source **Businesses Detail** ✎

Fields * Count

Reference (Reference)

Group +

Detail Status Description ✖ Display Name * ✎

Detail Status Description

Order +

Filter +

Limit Results

Link +

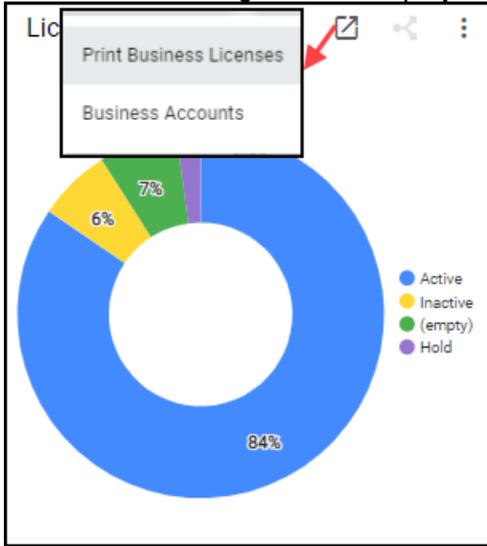
Business Accounts ✖

- Click Next.
The program displays the optional Card Connections step.

- Click Next to proceed to the final step.
The program displays the Review & Publish step.

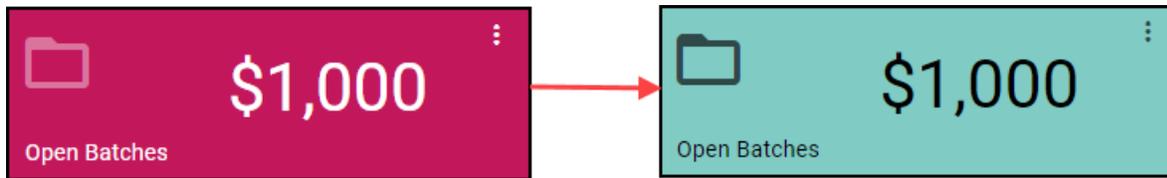
- Click Save.
The program closes the Card Designer and refreshes the page.

- Click the Launch button on the card to open the link. If you have added more than one link to the card, clicking Launch displays a list of the available links.



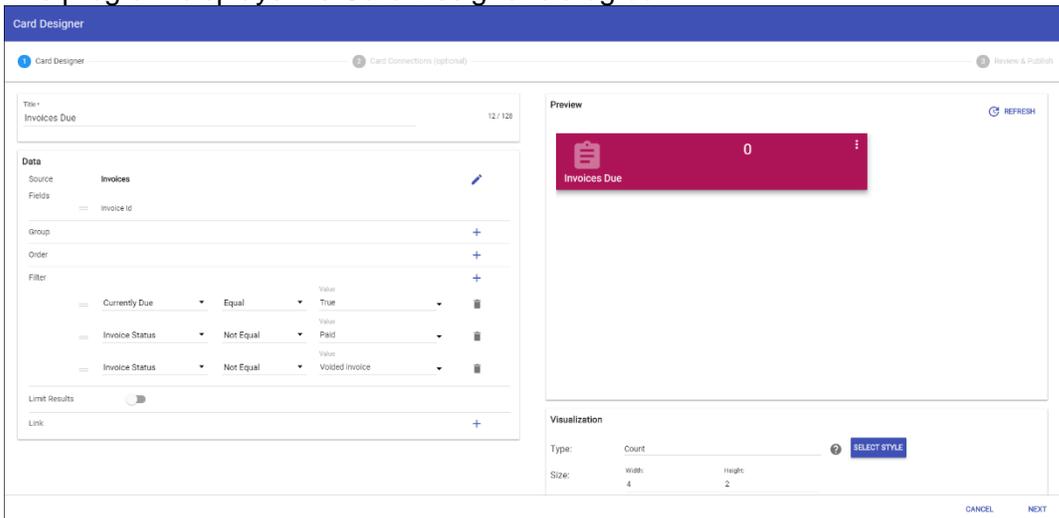
SETTING A THRESHOLD VALUE FOR A CARD

Setting threshold values can direct cards to display differently when certain conditions are met, providing visual cues to users. For example, if a fund falls below a certain dollar amount or if a specified number of invoices are due, those cards can be set to change color based on the data.

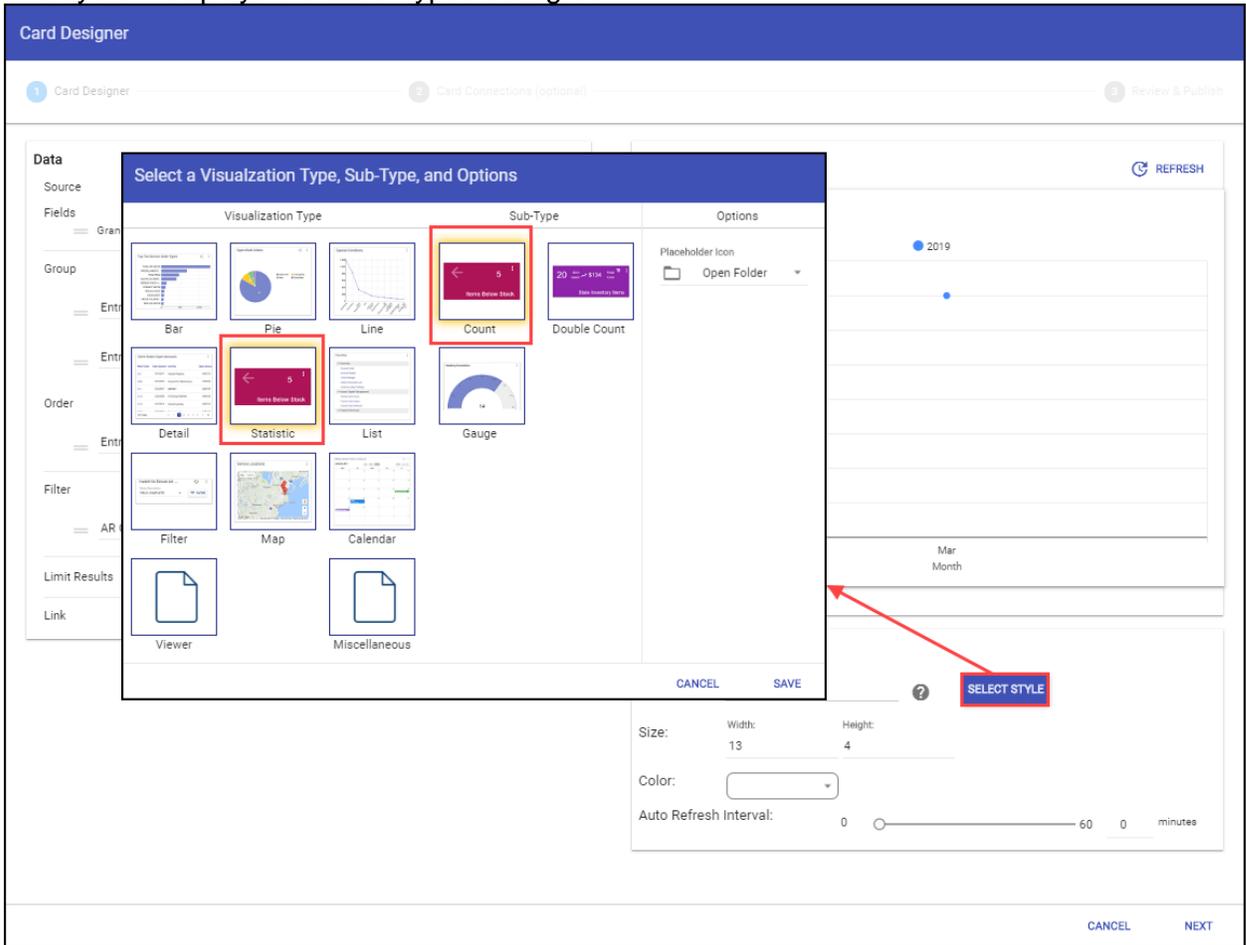


To add a threshold value to a card:

- Click the More button on the card and choose Card Designer from the Options group. The program displays the Card Designer dialog box.

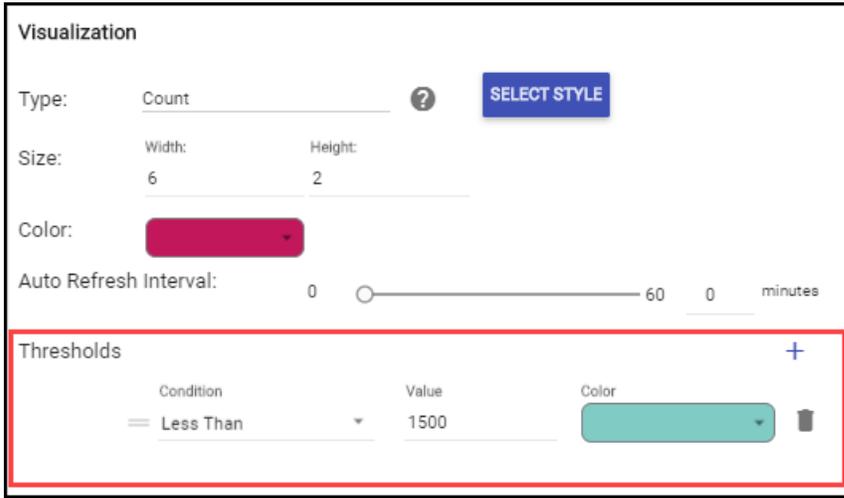


- In the Visualization group, click Select Style. The system displays the Card Types dialog box.



- From the Visualization Type group, click Statistics, and then click the applicable subtype.

- Click Save.
The program closes the Card Types dialog box. The Visualization group includes the Thresholds fields.



- Enter the condition, value, and color to display for the defined threshold.
For example, to draw attention to any invoices that are due, set the Condition list to Greater Than, the Value to 0, and the Color to orange. That is, when there are more than zero invoices due, the color of this card changes to orange.
- Click Next.
The Card Designer displays the optional Card Connections screen.
- Click Next.
The Card Designer provides the Review and Publish screen.
- Click Save.
The Card Designer dialog box closes and the page refreshes to display the updated card.

You can set more than one threshold value for a card. In this case, the order of the values in the Thresholds fields determines the priority, with the highest priority value listed at the top and the lowest priority value listed at the bottom.

SETTING A AUTOMATIC REFRESH TIME

The Auto Refresh Interval option indicates the number of minutes after which the card data automatically refreshes.

To set an automatic refresh time:

- Click the More button on the card and choose Card Designer from the Options group.

The program displays the Card Designer dialog box.

The screenshot shows the 'Card Designer' dialog box with three steps: 1. Card Designer, 2. Card Connections (optional), and 3. Review & Publish. The 'Data' section is configured with Source 'Invoices', Fields 'Invoice Number (InvoiceNumber) * Count', Group 'Clerk', Order 'Invoice Number' (Descending), and Limit Results '10'. The 'Preview' section shows a horizontal bar chart titled 'Active Invoices: How is productivity?' with a legend for 'Invoice Number'. The chart displays productivity values for various clerks. The 'Visualization' section is set to 'Bar Chart - Horizontal' with a width of 12 and height of 8. The 'Auto Refresh Interval' slider is highlighted with a red box, showing a value of 30 minutes.

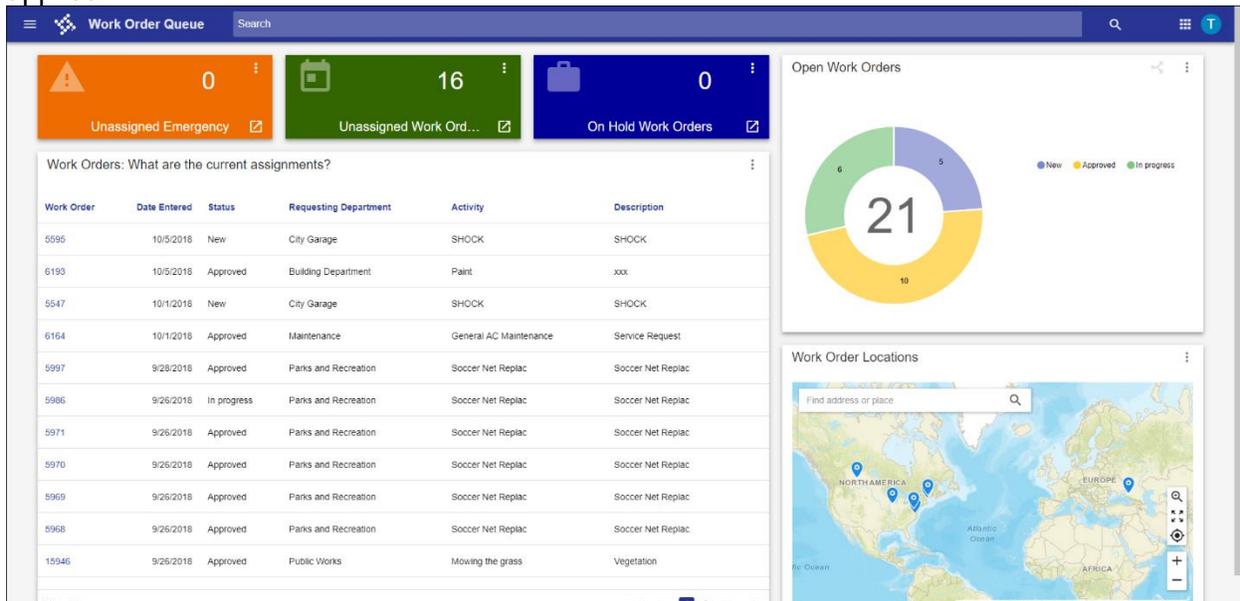
Clerk	Invoice Number (Count)
Munis	90
jean	55
Mark Morrill	50
hbrn	10
Brian Randle	10
Grant Jewett	10
jdavin	10
AMY LAWLOR	10
Sarah	10

2. In the Visualization group, select the Auto Refresh Interval slider.
3. Drag the slider to the correct interval setting. As you move the slider, the card displays the number of minutes for the selected position.
4. Click Next.
The Card Designer displays the optional Card Connections screen.
5. Click Next.
The Card Designer provides the Review and Publish screen.
6. Click Save.
The Card Designer dialog box closes. There are no visual changes to the card but the data will refresh according to the selected interval selected.

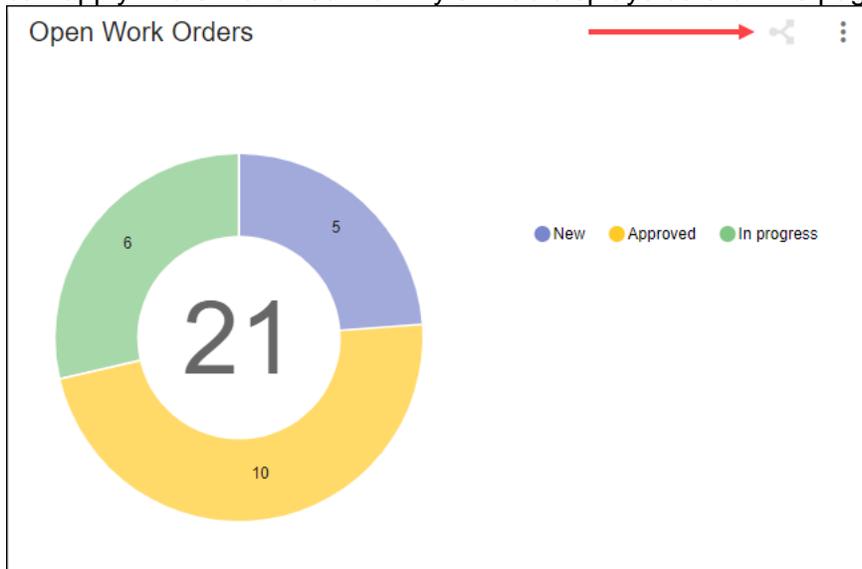
APPLYING A FILTER

Depending on the type, cards may include filters. Filters allow you to change the display or view other data sets provided by a card.

For example, for a user who has unrestricted data access, the following Work Order Queue page shows information for all the work orders in the database; no additional filters have been applied.



The Open Work Orders card displays a donut chart with different proportions for work orders in different statuses. The control card indicator on this card indicates that as a control card, you can apply filters that affect how Tyler Hub displays data on the page.



When you click the In Progress section of the donut chart on the Open Work Orders card, the page refreshes to apply a filter to the cards. Only work orders with a status of In Progress display on the affected cards on the page. The In Progress tag is added to these cards on the

page to show that the data has been filtered according to a status of In Progress.

The screenshot shows the 'Work Order Queue' dashboard. At the top, there are three summary cards: 'Unassigned Emergency' (0), 'Unassigned Work Ord...' (16), and 'On Hold Work Orders' (0). Below these is a table titled 'Work Orders: What are the current assignments?' with a filter dropdown set to 'In progress...'. The table lists 16 work orders, all with a status of 'In progress'. To the right, the 'Open Work Orders' card shows a donut chart with a total of 21, broken down by status: 6 New (blue), 10 Approved (yellow), and 5 In progress (green). Below this is a 'Work Order Locations' map showing a street view of a specific location.

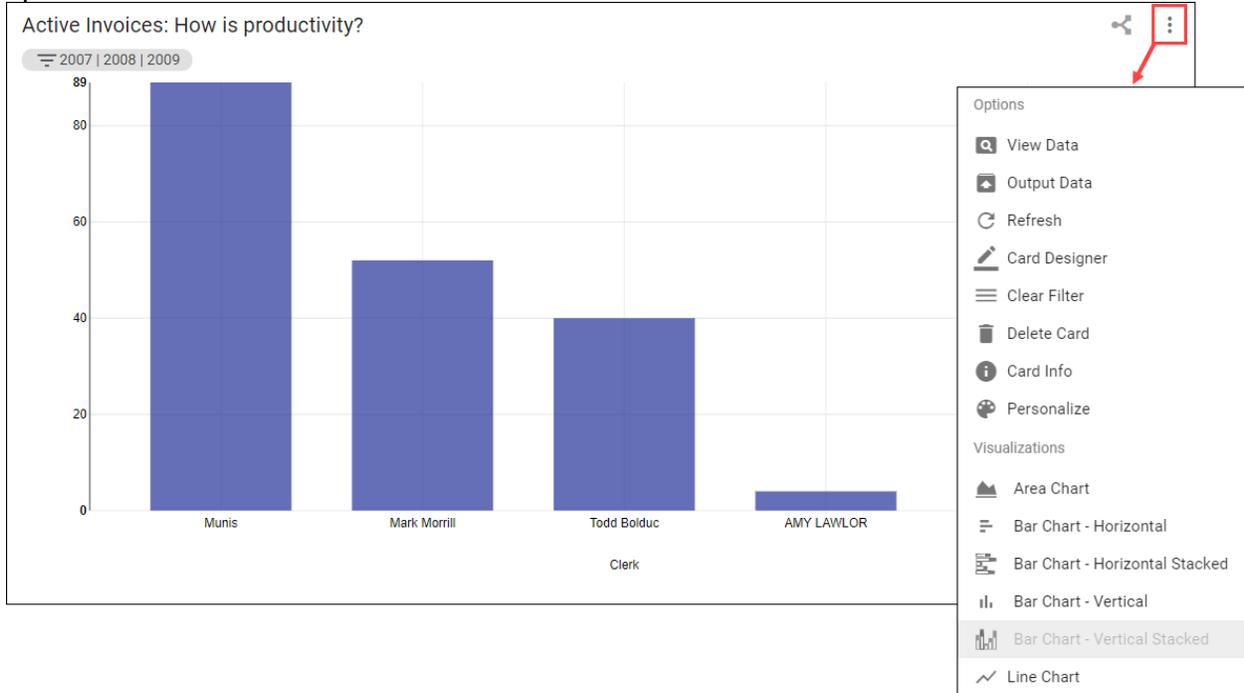
Work Order	Date Entered	Status	Requesting Department	Activity	Description
5595	10/5/2016	New	City Garage	SHOCK	SHOCK
6193	10/5/2016	Approved	Building Department	Paint	xxx
5547	10/1/2016	New	City Garage	SHOCK	SHOCK
6164	10/1/2016	Approved	Maintenance	General AC Maintenance	Service Request
5997	9/28/2016	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
5986	9/26/2016	In progress	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
5971	9/26/2016	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
5970	9/26/2016	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
5969	9/26/2016	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
5968	9/26/2016	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac
15946	9/26/2016	Approved	Public Works	Mowing the grass	Vegetation

Click the Clear Filter button on the Open Work Orders card to remove the applied filter from the entire page.

This screenshot shows the same interface as above, but with a red box highlighting the 'Clear Filter' button (represented by a circular arrow icon) on the 'Open Work Orders' card. A red arrow points from this button to the 'Work Order Locations' map below it. The map now shows a broader geographical view of North America and Europe, indicating that the filter has been removed.

MODIFYING CARD DATA AND PRESENTATION

Depending on your user permissions and on the type of card, there may be multiple options available for modifying the data and presentation. When you click the More button in the upper-right corner of a card, the program provides the Options and Visualizations groups of items to update.



OPTIONS

The Options group provides the View Data, Output Data, Refresh, Card Designer, Delete Card, Card Info, and Personalize options, if your permissions allow access to these features. Additionally, control cards feature the Clear Filter option and cards with pending updates include the Update Card option.

View Data

When you click View Data, the system displays the View Data dialog box. This dialog box shows a table of data that supports the card. Click the column headings to sort the data.

The screenshot shows the 'View Data' dialog box with a search bar and 'Filter Data' and 'Output Data' options. The table displays the following data:

Invoice Number	Status	Invoice Status	Description	Invoice Total	Discount Amount	Net Amount	Invoice Date	Invoice Date Year	Discount Date	Due Date	Check Date	User ID
123	E	Pending Ext...	desc	\$100.00	\$0.00	\$110.00	1/8/2018	2018	1/1/0001	1/8/2018	1/1/0001	0
123456789	E	Pending Ext...	HERE is a l...	\$1,110.00	\$0.00	\$1,221.00	1/8/2018	2018	1/1/0001	1/8/2018	1/1/0001	0
987	E	Pending Ext...	LINE DES...	\$60.00	\$0.00	\$66.00	1/8/2018	2018	1/1/0001	1/8/2018	1/1/0001	0
1234	E	Pending Ext...	9/18/14 + ...	\$12,000.00	\$0.00	\$13,200.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
23456	E	Pending Ext...	DESC	\$50.00	\$0.00	\$55.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
4567	E	Pending Ext...	12345678...	\$90.00	\$0.00	\$99.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
987	E	Pending Ext...	HERE is a l...	\$1,110.00	\$0.00	\$1,221.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
7777	E	Pending Ext...	desc	\$100.00	\$0.00	\$110.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
2222	E	Pending Ext...	-DESCRIP...	\$1,460.00	\$0.00	\$1,606.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
406 total												

The View Data dialog box features additional options to search, filter, and output the data.

This close-up view highlights the search bar and the 'Filter Data' and 'Output Data' options. The table below shows the first two rows of data:

Invoice Number	Status	Invoice Status	Description	Invoice Total	Discount Amount	Net Amount	Invoice Date	Invoice Date Year	Discount Date	Due Date	Check Date	User ID
125	E	Pending Ext...		\$1,234.00	\$0.00	\$1,357.40	6/12/2018	2018	1/1/0001	6/12/2018	1/1/0001	C
999	E	Pending Ext...		\$40.00	\$0.00	\$44.00	6/12/2018	2018	1/1/0001	6/12/2018	1/1/0001	C

The search box allows you to enter search criteria to narrow the displayed results. For example, entering the search term "EFT" refines the data to display only invoices with that term.

View Data

Payment Trends: What Vendors have been paid?

Filter Data Output Data

Invoice Number	Status	Invoice Status	Description	Invoice Total	Discount Amount	Net Amount	Invoice Date	Invoice Date Year	Discount Date	Due Date	Check Date	Us
12346747	P	Paid	eft	\$10.00	\$0.00	\$10.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346748	P	Paid	eft	\$20.00	\$0.00	\$20.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346749	P	Paid	eft	\$30.00	\$0.00	\$30.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346750	P	Paid	eft	\$40.00	\$0.00	\$40.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346751	P	Paid	eft	\$50.00	\$0.00	\$50.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346752	P	Paid	eft	\$60.00	\$0.00	\$60.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346753	P	Paid	eft	\$70.00	\$0.00	\$70.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346754	P	Paid	eft	\$80.00	\$0.00	\$80.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346755	P	Paid	eft	\$90.00	\$0.00	\$90.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2
12346756	P	Paid	eft	\$100.00	\$0.00	\$100.00	3/16/2018	2018	1/1/0001	4/15/2018	3/19/2018	2

24 total

1 2 3

CLOSE

The Filter Data slider provides the option to enable or disable any applied filters. For example, if you applied a filter elsewhere on the page, you can disable the filter to view all the data in the View Data dialog box.

The Output Data option allows you to export the data in PDF, Excel®, or CSV format.

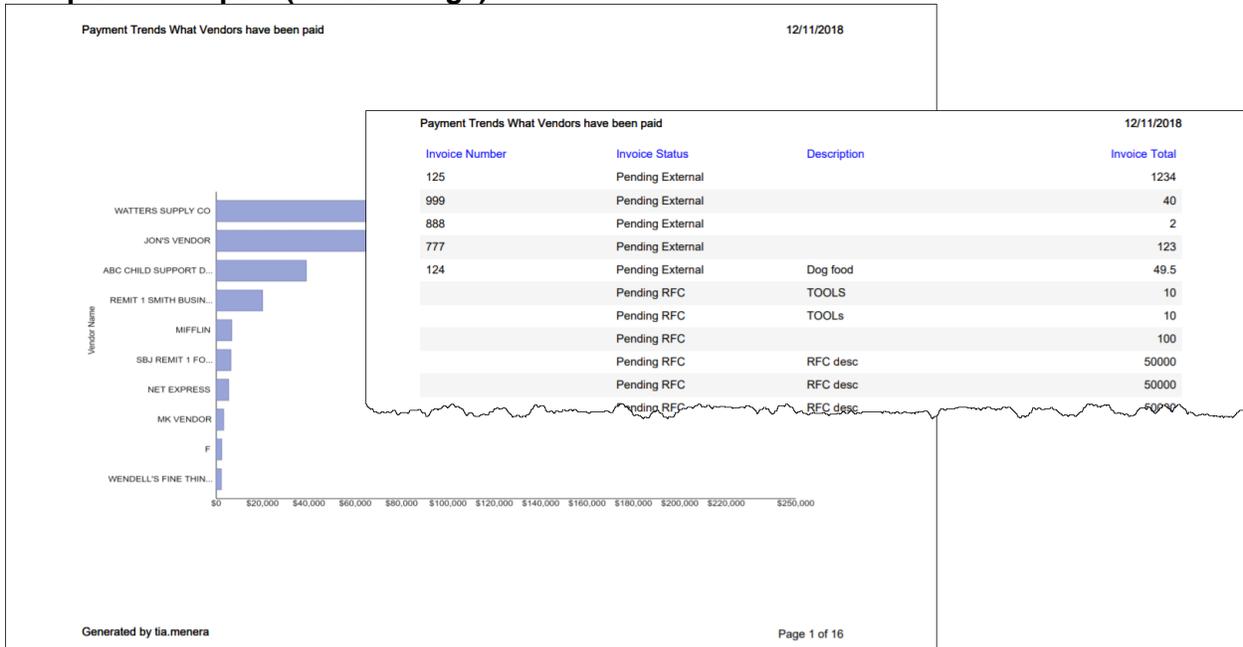
Output Data

The Output Data option is accessible from both the More menu and the View Data dialog box. When you click Output Data, the system displays the Output Data dialog box. This feature allows you to export the data in PDF, Excel®, or CSV format. If you choose Excel, the Pivot Table option is available to export the data as a pivot table.

To output the data, complete the fields to specify the output criteria. Refer to the Field Descriptions table as needed. Click Output to generate the file.

Field	Description
Title	Displays the title of the card, by default, but you can change this.
File Type	Indicates to output the data as a PDF, an Excel file, or a CSV file.
Pivot Table	Specifies to output the data as a pivot table. This option is accessible if you select Excel as the file type.
Include	Determines how to output the data: <ul style="list-style-type: none"> • Data Only—Exports only the data. This option is accessible with all file types. • Data & Image—Exports the data and the associated image; for example, if the card displays a bar chart, the bar chart is exported. This option is only accessible if PDF is selected. • Image Only—Exports the image only. This option is only accessible if PDF is selected. When Image Only is enabled, the remaining fields on the Output Data screen are hidden.
Number of Records	Specifies how many records to include, such as all records or the first 50 records listed based on the sort criteria.
Columns	Establishes the data columns to include in the output.

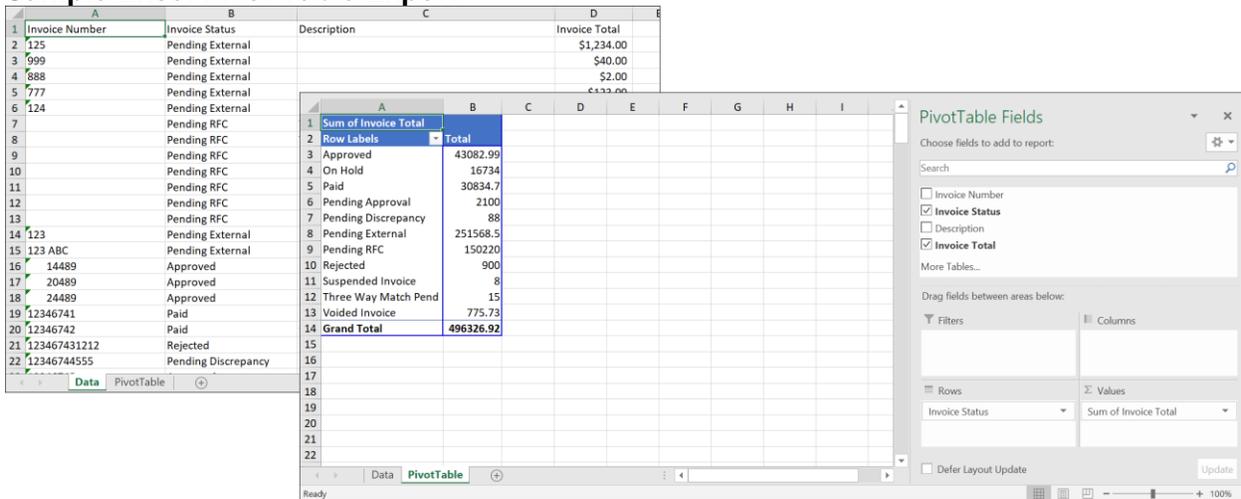
Sample PDF Export (Data & Image)



Sample Excel Export

	A	B	C	D
1	Invoice Number	Invoice Status	Description	Invoice Total
2	125	Pending External		\$1,234.00
3	999	Pending External		\$40.00
4	888	Pending External		\$2.00
5	777	Pending External		\$123.00
6	124	Pending External	Dog food	\$49.50
7		Pending RFC	TOOLS	\$10.00
8		Pending RFC	TOOLS	\$10.00
9		Pending RFC		\$100.00
10		Pending RFC	RFC desc	\$50,000.00

Sample Excel Pivot Table Export



Sample CSV Export

	A	B	C	D
1	Invoice Number	Invoice Status	Description	Invoice Total
2	125	Pending External		1234
3	999	Pending External		40
4	888	Pending External		2
5	777	Pending External		123
6	124	Pending External	Dog food	49.5
7		Pending RFC	TOOLS	10
8		Pending RFC	TOOLS	10
9		Pending RFC		100
10		Pending RFC	RFC desc	50000

Refresh

The Refresh option refreshes the card to retrieve the most recent data since the card was last refreshed or since changes were applied.

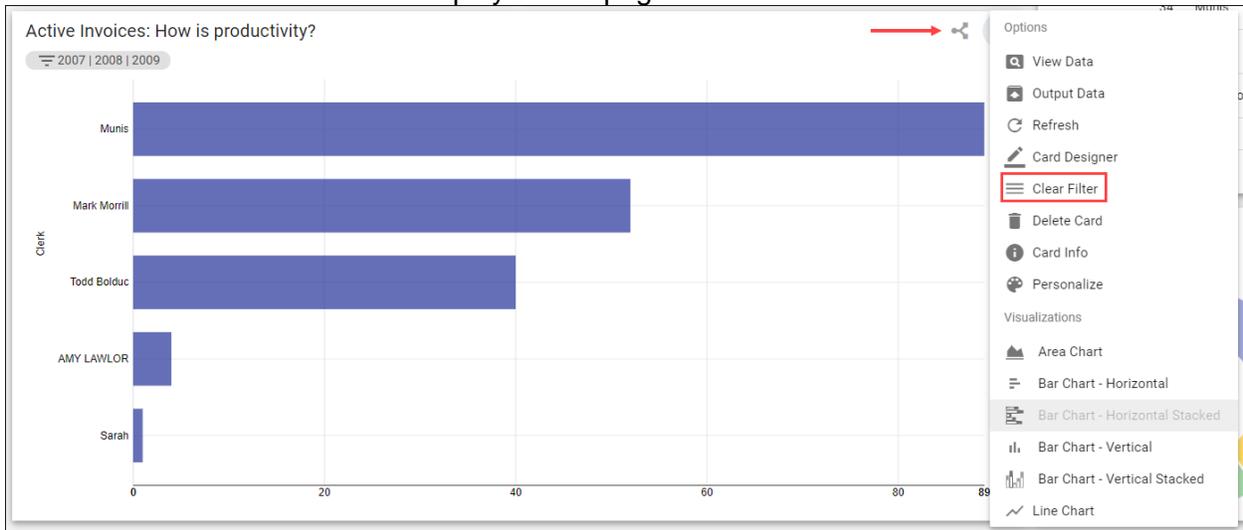
Card Designer

The Card Designer provides options to customize a card's style, format, links, and data sets using a step-by-step process. The Card Designer is typically restricted to system administrators.

For more detailed information, see the Using Card Designer section of this document or refer to the *Card Designer* document in the Tyler Hub group on the Tyler Community page.

Clear Filter (Control Cards Only)

The Clear Filter option is available for control cards only. Control cards are identified by the Control Card indicator next to the More option. Each page typically has one control card that affects the data the other cards display on the page.



The Clear Filter option removes any filters that were applied using the control card. For example, clicking the Munis bar on the bar chart applies the Munis filter to the bar chart card and to other cards on the page.

The screenshot displays the Tyler Hub interface with the following components:

- Filter By Year:** Invoice Date Year, 3 items selected, FILTER button.
- Total Invoices:** 186
- Open Batches:** \$1,000
- Invoice 3-Way Match:** 0
- Active Invoices: How is productivity?:** A table with columns: Invoice Date, Due Date, Invoice, Status, Vendor Name, Discount Amt., Net Amt., Invoice Total. The 'Munis' filter is applied to this table.
- Batch Review:** A table with columns: Batch, Clerk, Vendor Name, Net Amount. The 'Munis' filter is applied to this table.
- Invoice Analysis:** A pie chart showing 128 total invoices, with 83 Paid Invoices, 43 Open Invoices, and 2 Posted Invoices. The 'Munis' filter is applied to this chart.

When the filter is applied, the Control Card indicator is replaced by the Clear Filter icon. Clicking either the icon or Clear Filter from the Options menu removes the filter from all associated cards on the page and restores the Control Card indicator.

Active Invoices: How is productivity? 

2007 | 2008 | 2009 Munis

Invoice Date	Due Date	Invoice	Status	Vendor Name	Discount Amt.	Net Amt.	Invoice Total
2/6/2007	2/16/2007	5539	Approved	DEF SUPPLY COMPANY	\$5.10	\$96.89	\$101.99
2/14/2007	2/24/2007	372	Paid	DEF SUPPLY COMPANY	\$5.00	\$95.00	\$100.00

Delete Card

The Delete Card option allows you to selectively remove a card from a page. When you click Delete Card, the program displays a prompt to confirm your action.

Delete Card

Are you sure you want to delete this card from this page?

CANCEL
YES, DELETE

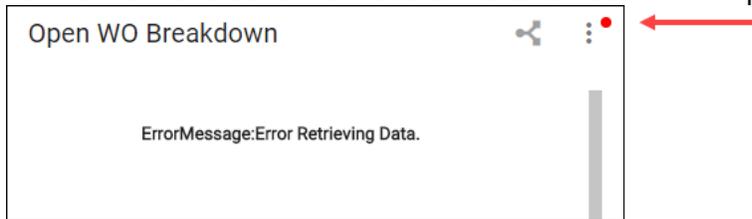
Click Yes, Delete to proceed with deleting the card. The program refreshes the page and removes the selected card.

Deleting a card from a page only affects that page in your Tyler Hub. Other users who have that page added to their versions of Tyler Hub will not be affected, unless you republish the page to the Content Library and overwrite the affected page. To do so, you need appropriate permissions.

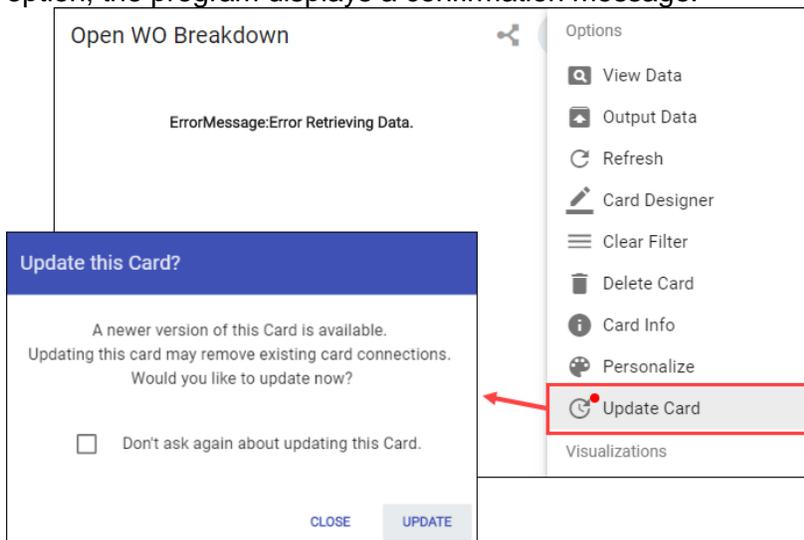
To restore a deleted card, you can add a new copy of the page and delete the old page, or add the card directly from the Content Library, if you have appropriate permissions.

Update Card

The Update Card option displays only when the card requires an update. This may occur if the author of the card has published new changes to a page you have added. A red circle appears next to the More button to indicate the card needs to be updated.

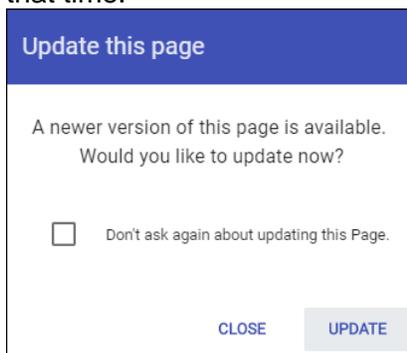


When you click More, the Update Card option is available in the Options group. If you select this option, the program displays a confirmation message.



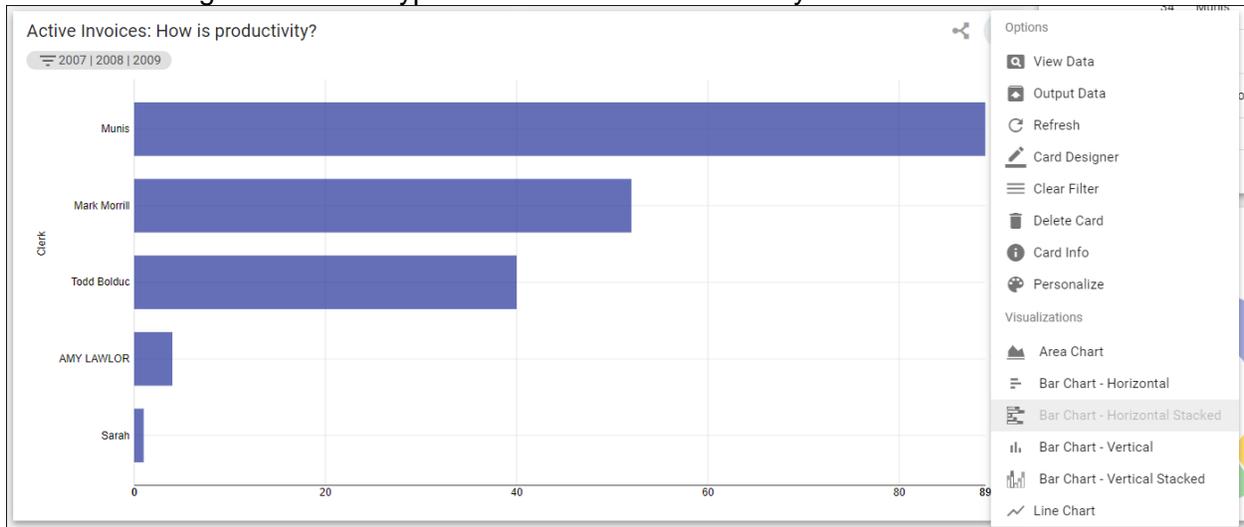
Select the Don't Ask Again about Updating This Card check box to prevent the program from displaying additional prompts in the future. Click Update to initialize the update. The program displays a brief status message indicating the update is being applied and then refreshes the screen to display the updated card.

If you open a page and multiple cards require updates, the page may display a prompt indicating the entire page needs to be updated and you can choose to apply all the updates at that time.



VISUALIZATIONS

Visualizations affect how Tyler Hub displays data on a card (for example, charts, graphs, or lists). When you select a visualization, the current type is not accessible, but you can select any of the remaining visualization types to view the data differently.



Available visualizations vary based on the type of card. Refer to [Appendix B—Visualizations](#) for examples.

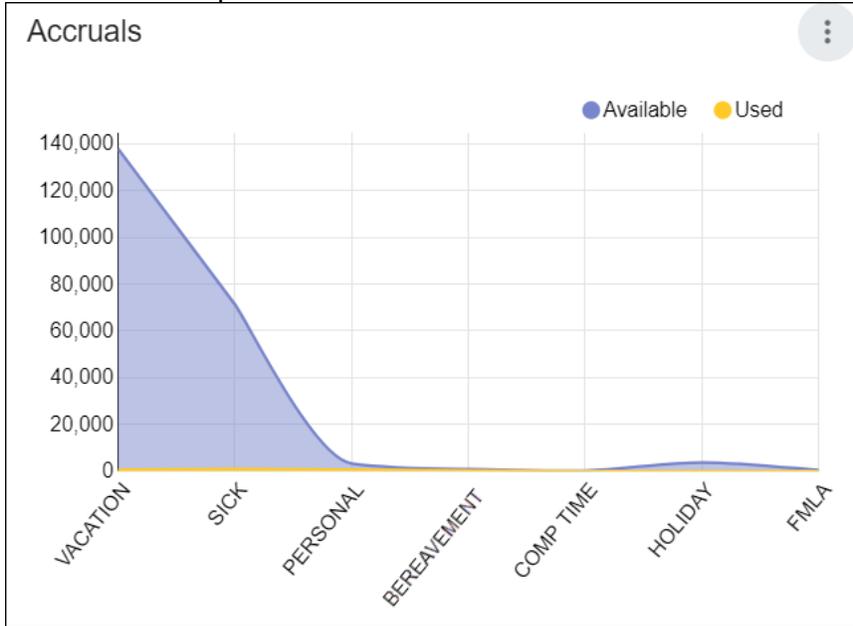
Appendix B—Visualizations

Tyler Hub features several options for visualizations, providing different ways to view card data. This appendix shows examples of common visualizations. See the *Visualizations* document in the Tyler Hub group of Tyler Community for more detailed information.

Area Chart

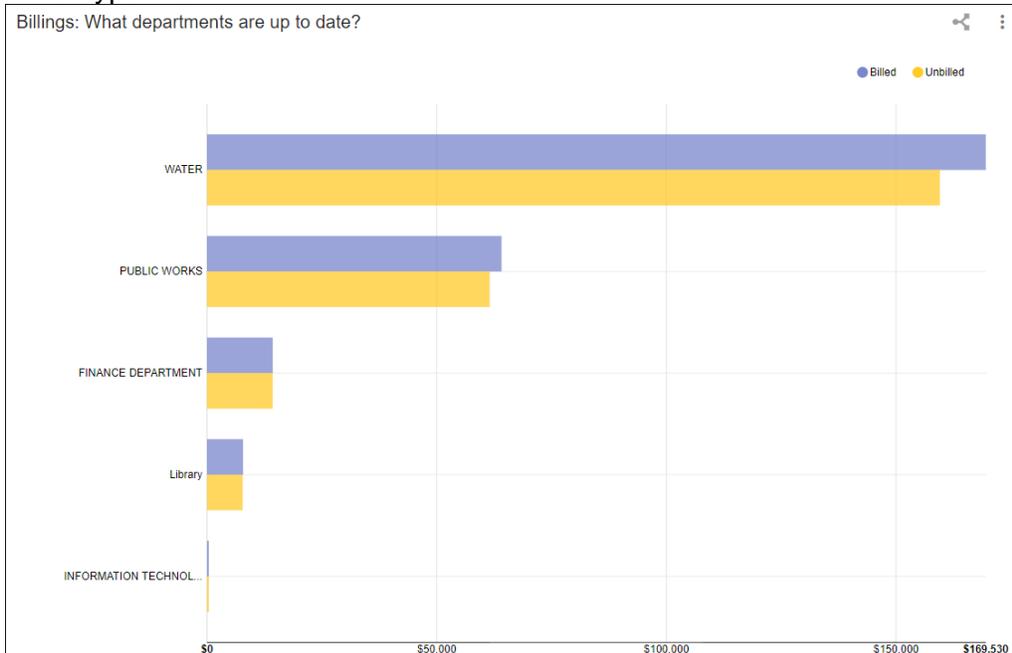
Card Type: Line

Area charts compare two or more data sets.



Bar Chart – Horizontal

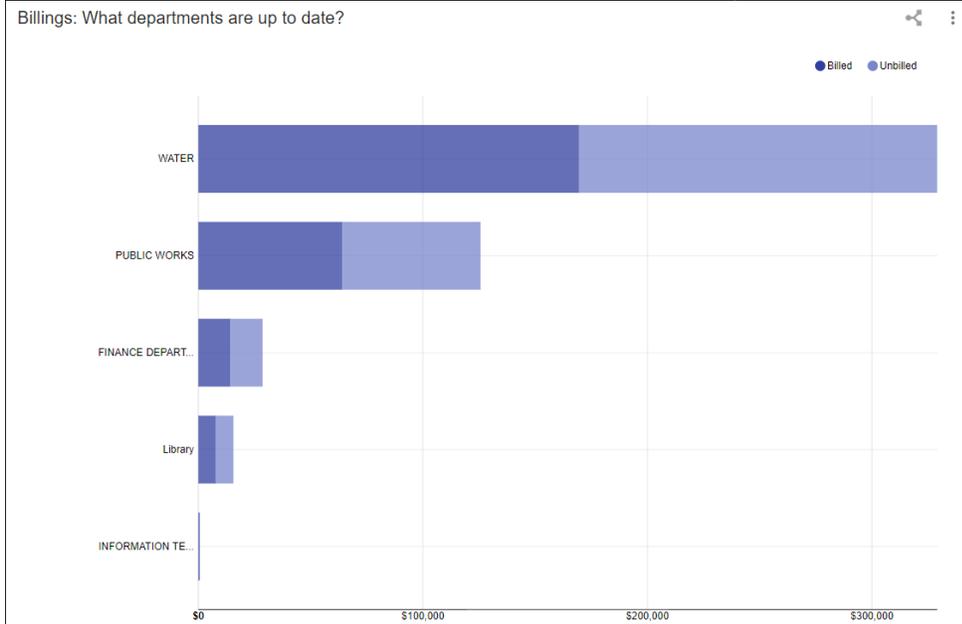
Card Type: Bar



Bar Chart–Horizontal Stacked

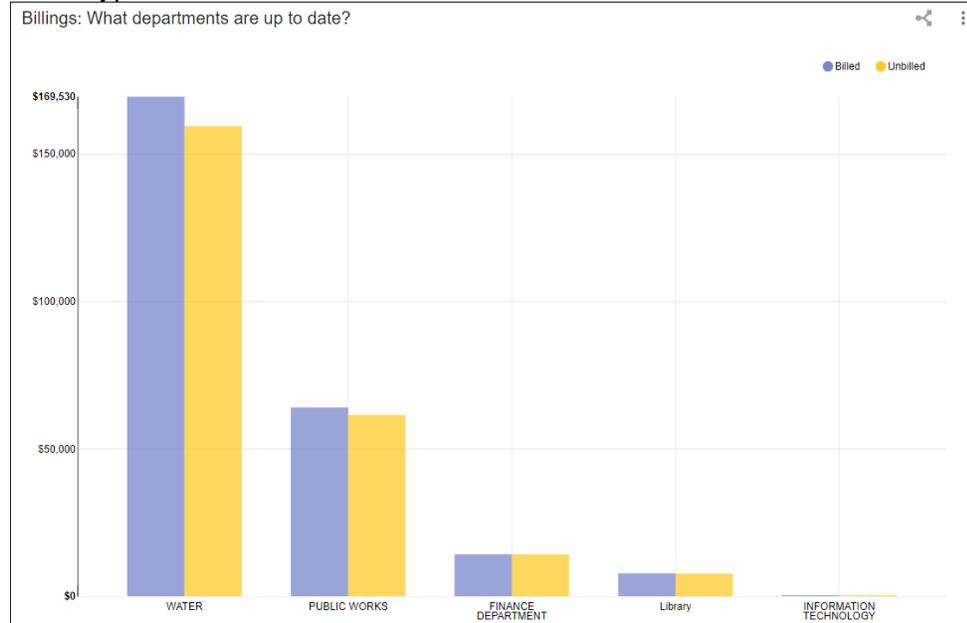
Card Type: Bar

Stacked bar charts show how groups of data relate to a whole. For example, this stacked bar chart shows the billed and unbilled amounts that make up the total amounts for each category.



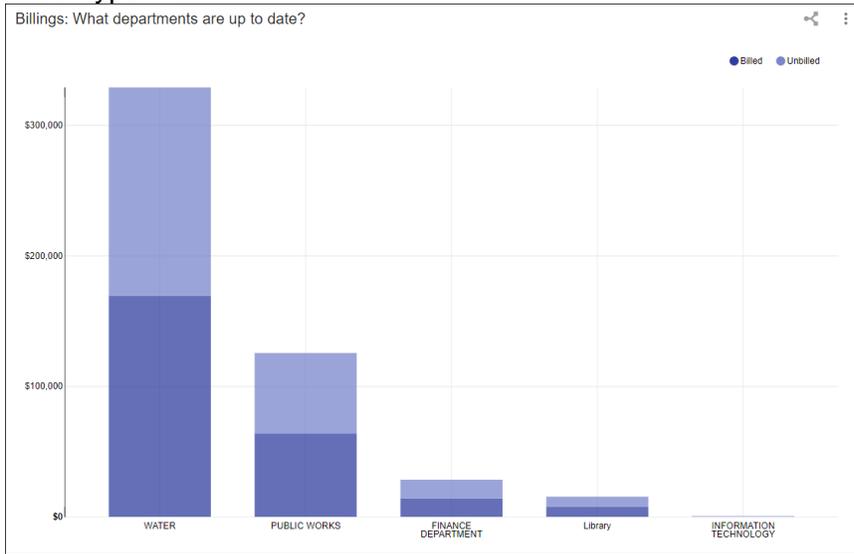
Bar Chart–Vertical

Card Type: Bar



Bar Chart–Vertical Stacked

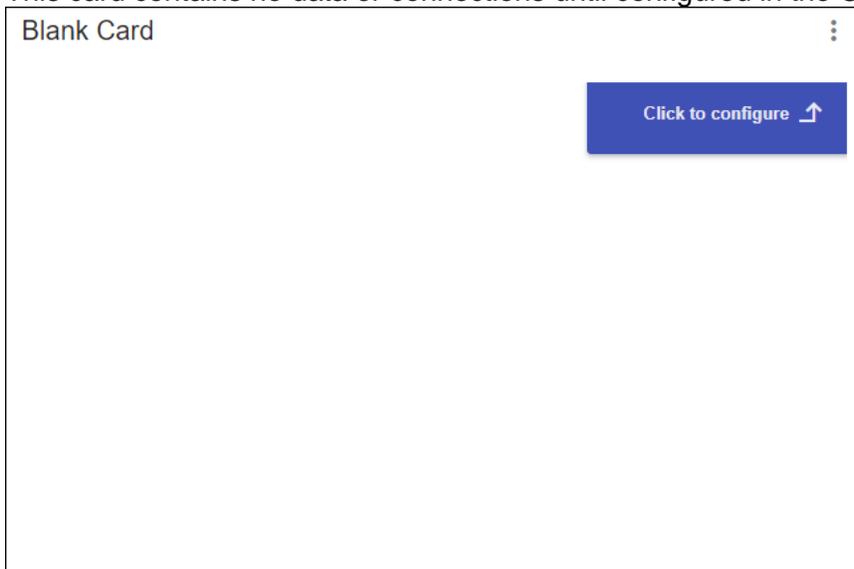
Card Type: Bar



Blank

Card Type: Miscellaneous

This card contains no data or connections until configured in the Card Designer.



Calendar

Card Type: Calendar

The Calendar card displays scheduled events in a daily, weekly, or monthly format. Click a scheduled event to view details. The Hide Weekends and Show Weekends options allow you to remove or include Sundays and Saturdays.

Billing Calendar: What is coming up?

Jul 8 – 14, 2018

Day Week Month Today < > Hide Weekends

	Sun 7/8	Mon 7/9	Tue 7/10	Wed 7/11	Thu 7/12	Fri 7/13	Sat 7/14
All-Day			Delinquent Notices				
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							

Delinquent Notices

Event Start: 7/10/2018
 Event End: 7/10/2018
 Event Assignee: munis

OK

Count

Card Type: Statistic

The Count card displays a total amount or number.

\$29,052

Spent

Data Table

Card Type: Detail

The Data Table card displays rows and columns of data in a table. Click the column headers to sort the data or update the card properties to filter the data.

Current Fund Budget: What funds are within budget? ↻ ⋮

Fund Description	Fund Id	Revised	Spent	Available	Over Budget
GRANT FUND-SLC	9	\$0.00	\$0.00	\$0.00	
SCHOOL FUND	3	\$15,827,769.09	\$0.00	\$15,827,769.09	
MUNICIPAL FEDERAL GRANTS	6	\$1,213,810.70	\$0.00	\$1,213,810.70	
GENERAL FUND	1	\$1,023,229,535.81	\$44,112.86	\$1,023,185,422.95	
STUDENT ACTIVITY FUND	10	\$0.00	\$0.00	\$0.00	
FOOD SERVICE FUND	4	\$1,484,390.25	\$0.00	\$1,484,390.25	
GFA	2	\$0.00	\$6,005.71	-\$6,005.71	✓
WEST FUND	17	\$0.00	\$0.00	\$0.00	

8 total

Data table cards can be configured to allow users to perform specific actions. For example, users with appropriate permissions can assign an inspection date and an inspector, and then submit each record. Unauthorized users are unable to access the date, inspector, and action fields.

Inspections Unperformed - with Actions ⋮

Inspection	Department	Inspection Type	Descript	State	Scheduled Date	Inspector Name	Action
151	BLDG	Rough Plumbing		ME	1/1/0001	Ingrid Inspector ▼	SUBMIT
393	PBWKS	Soil Test		MD	4/18/2017	Ingrid Inspector ▼	SUBMIT
1715	PBWKS	Measured Setbacks		MD	12/9/2002	John L White ▼	SUBMIT
1741	PLANG	Final Inspection		NH	3/21/2003	John L White ▼	SUBMIT
1767	PLANG	Reinspection		MD	3/12/2003	▼	SUBMIT

3,206 total ⏪ < **1** 2 3 4 5 > ⏩

Detail

Card Type: Detail

The Detail card displays additional information about a record.

Employee Profile ⋮



Last Name
TARGET

First Name
JOHN

Employee Number
58

Phone
555-515-0510

Email
john.target@tylertown.com

Department
No value available

Work Location
FINANCE DEPARTMENT

< PREV
NEXT >

Document Viewer

Card Type: Viewer

The Document Viewer card allows you to view reports within properly configured cards. When you click Output Data from the More menu on this card, the report downloads directly to the browser tray.

The TCM Docs option displays as an output option when Tyler Content Manager is configured for your organization and the selected data card.

Report Viewer ⋮

prgenddp0066.txt

1 of 2 Automatic Zoom

```

01/03/2019 13:01 |Tyler Technologies, INC
|P 1
henry.babcock |ACCURAL OVRAGE REPORT
|prtimrpt

      RUN: 0 WARRANT: hb0103      FROM 12/16/2018 TO 12/31/2018

      A

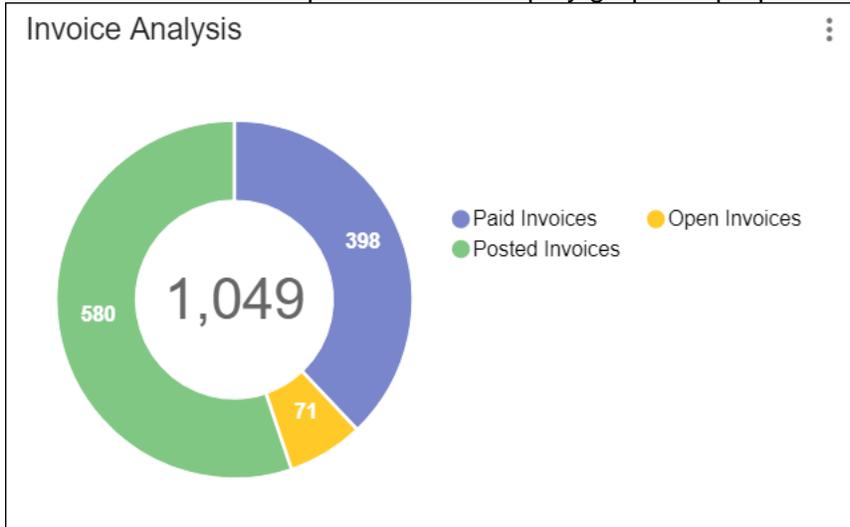
CCRUALS   ACCRUALS   AVAILABLE   PRIOR
EMP #   NAME   THIS BATCH  THIS PAYROLL  UOM  SICK BANK  BALANCE   JOB  ACCRUAL
-----
BATCH:   1
10050   DOZIER, PJ
10.0000   10.0000   H      8.0000   0.0000
                                           2 SICK

      ** END OF REPORT - Generated by
Henry Babcock **
    
```

Donut Chart

Card Type: Pie

Donut charts resemble pie charts but display graphical proportions of data in arcs.



Double Count

Card Type: Statistic

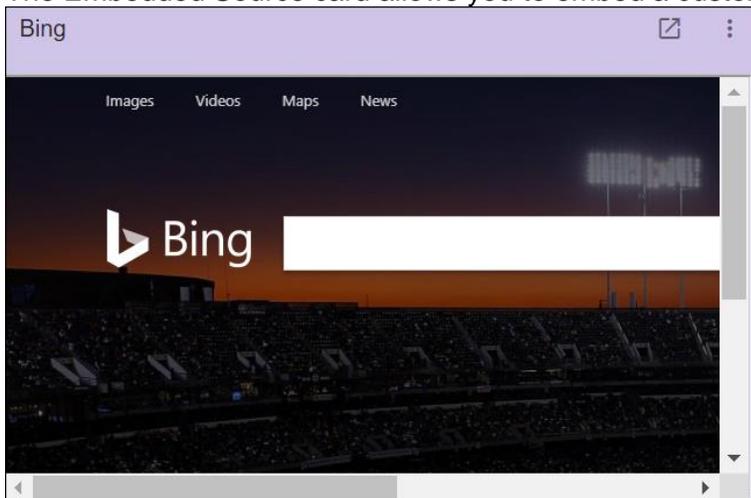
The Double Count card displays two total amounts or numbers. For example, the Shut Off card on the Customer Trending page displays the total number of customer accounts that have been through the shut-off process (16), and the number of accounts with a zero balance (0).



Embedded Source

Card Type: Viewer

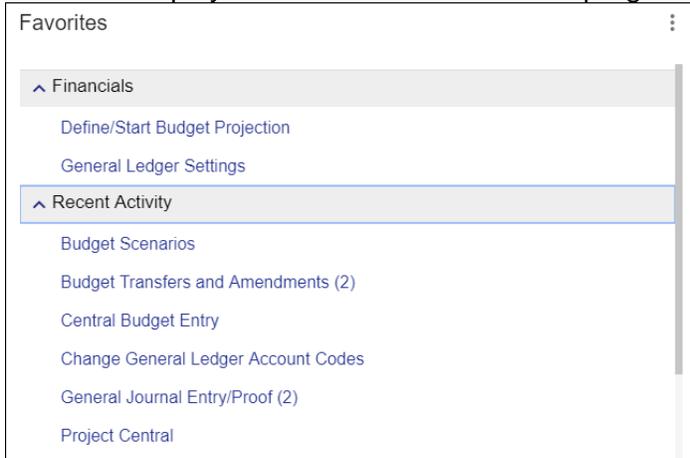
The Embedded Source card allows you to embed a custom URL into an existing page.



Favorites

Card Type: List

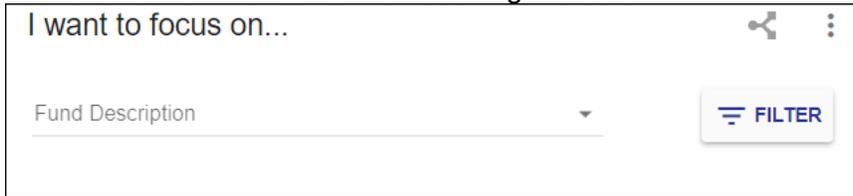
This card displays the current user's favorite programs and recent activity.



Filter Drop Down

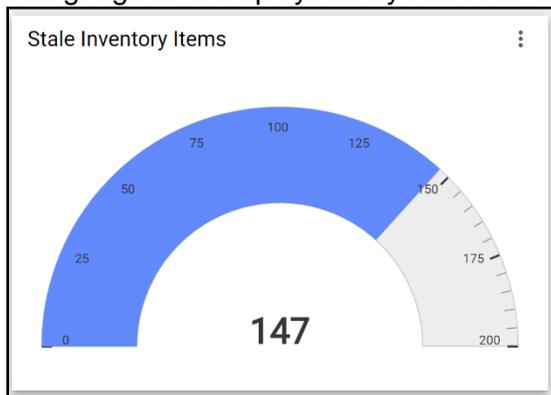
Card Type: Filter

The Filter Drop Down card provides options to apply a filter to the displayed data. When you select the Filter Drop Down type, the Filter Required check box in Card Designer requires that connected cards display values only when a filter is applied. In this case, the card provides a list of filter and the Filter button for resetting the data.



Gauge Card

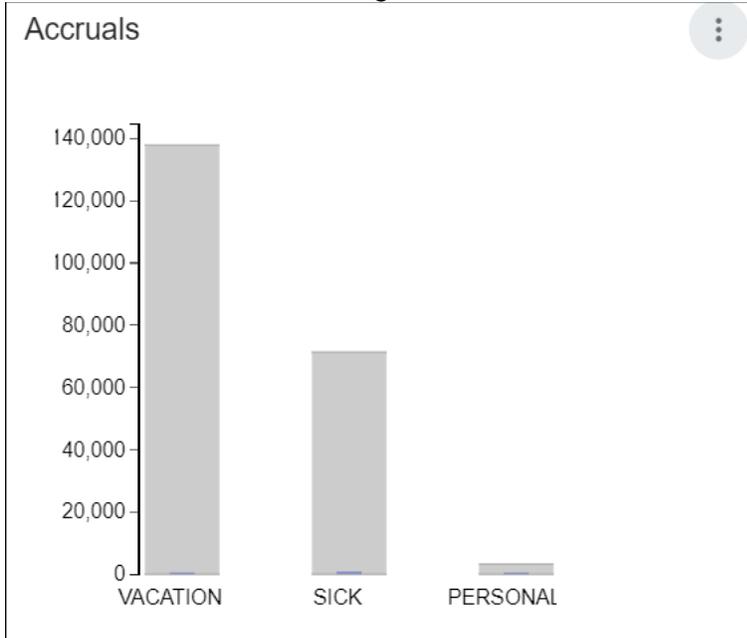
The gauge card displays a key metric in relation to a range.



Goal Chart

Card Type: Bar

Goal charts show an overall goal, such as an amount, and the progress toward achieving it.



Line Chart

Card Type: Line

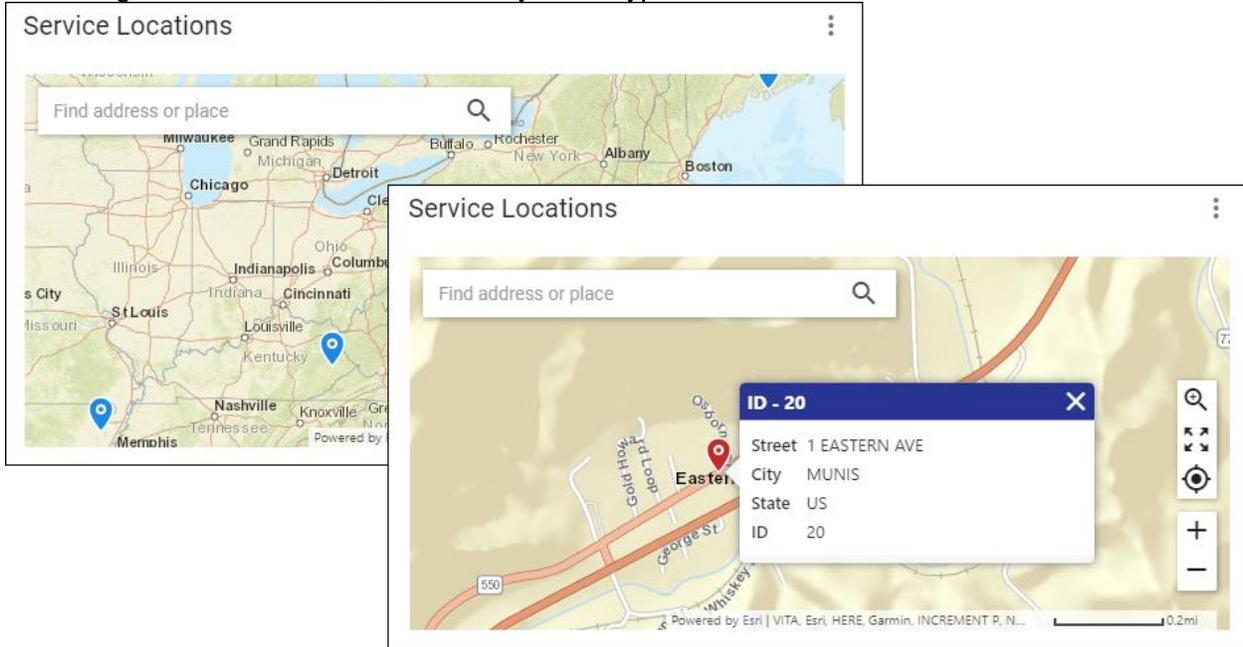
The Line Chart card displays historical trends over time.



Map View

Card Type: Map

The Map View card displays pinned locations, such as those used for assets or service orders. Clicking a pin provides additional information based on how the card is configured. Users who have access to the Card Designer can also configure the pins to display different colors according to selected criteria, such as by asset type.



Media

Card Type: Viewer

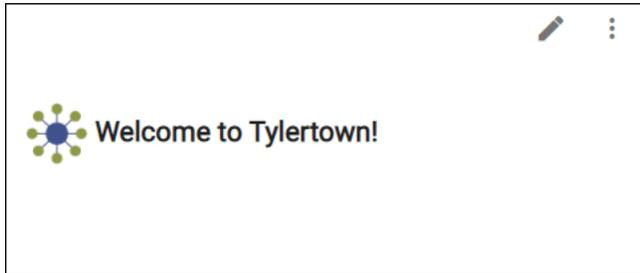
The Media card displays embedded media, such as videos.



Narrative

Card Type: Detail

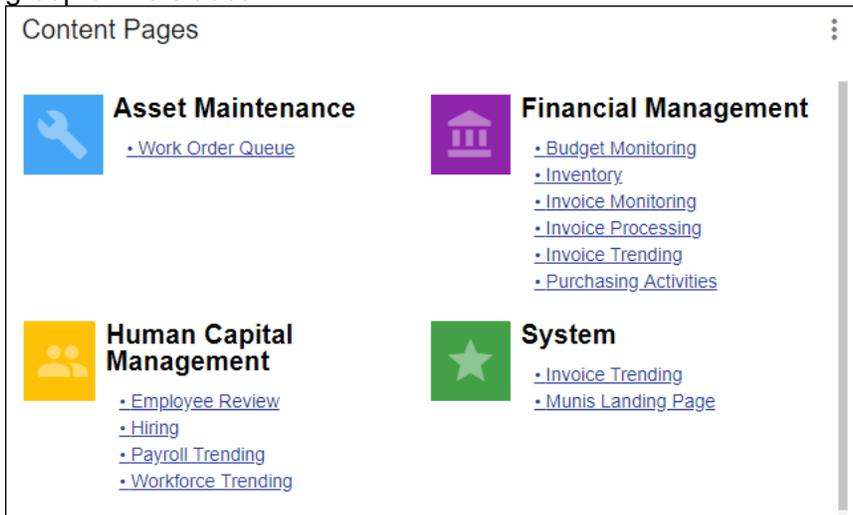
The Narrative card provides a text box for displaying information, hosted web images, and announcements.



Pages Content

Card Type: List

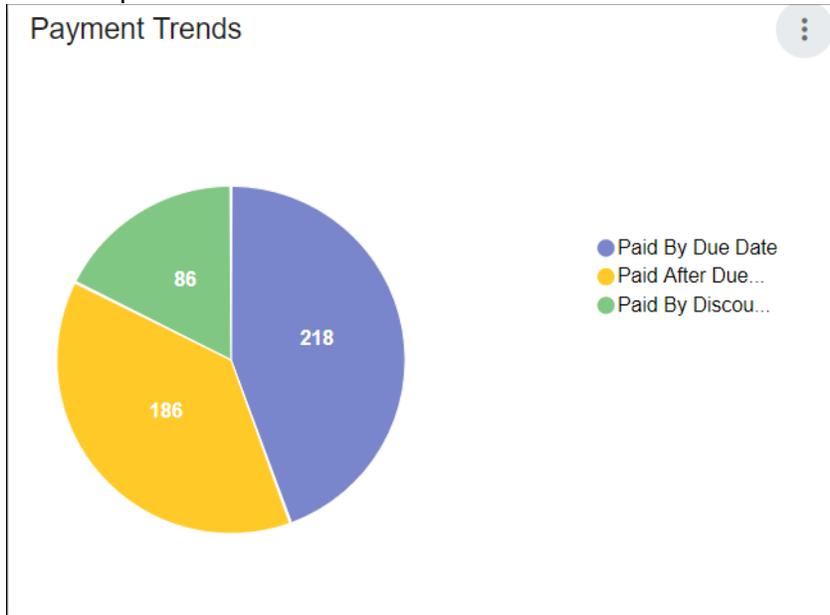
The Pages Content card displays links to the Tyler Hub pages that have been added to your Tyler Hub environment. These are the same pages to which you have access in the Pages group of the sidebar.



Pie Chart

Card Type: Pie

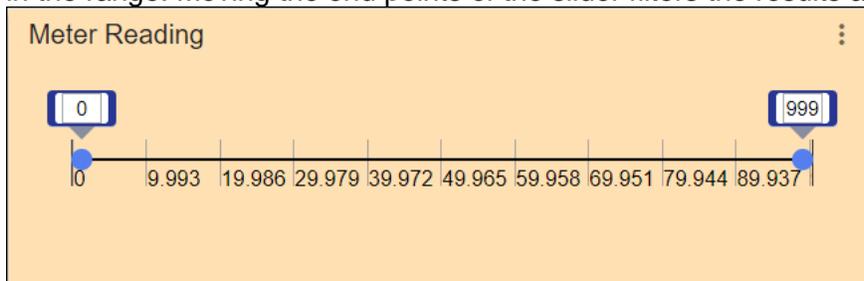
The Pie Chart card shows how the data make up parts of a whole. A legend identifies the different parts.



Range Slider

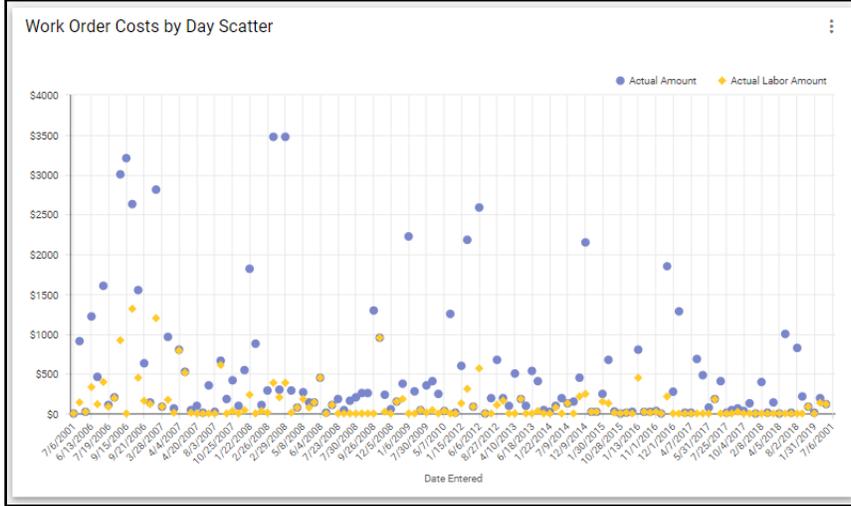
Card Type: Filter

The Range Slider card allows you to filter other cards on the page based on the values selected in the range. Moving the end points of the slider filters the results accordingly.



Scatter Chart

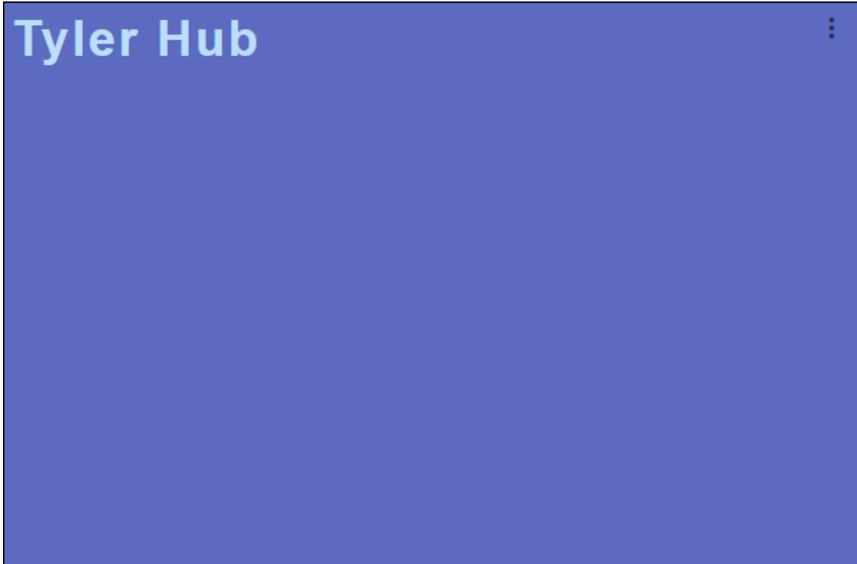
A scatter chart shows how one variable is affected by another. This chart type is often used with large data sets to see trends and concentrations of data in relation to other points.



Site Banner

Card Type: Miscellaneous

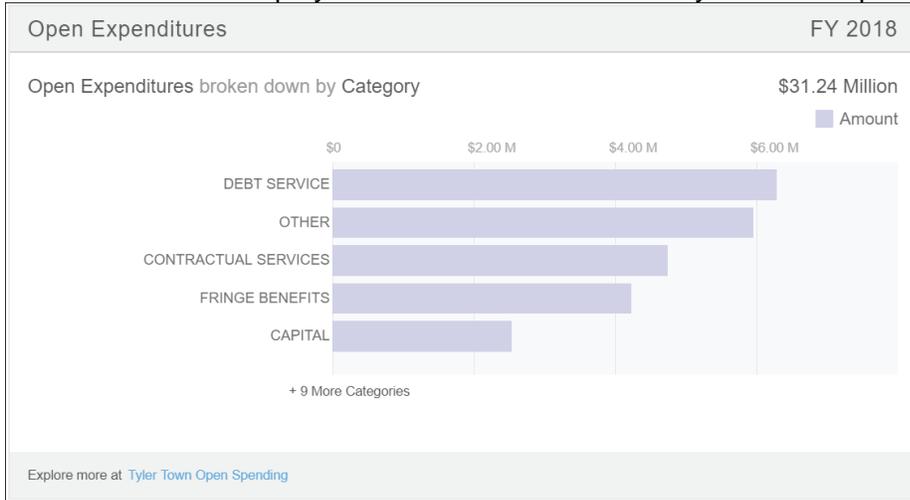
The Site Banner card displays the same text and images, if applicable, used for the sitewide banner.



Socrata

Card Type: Viewer

The Socrata card displays embedded data from the Tyler Socrata product, if configured.



Threshold

Card Type: Statistic

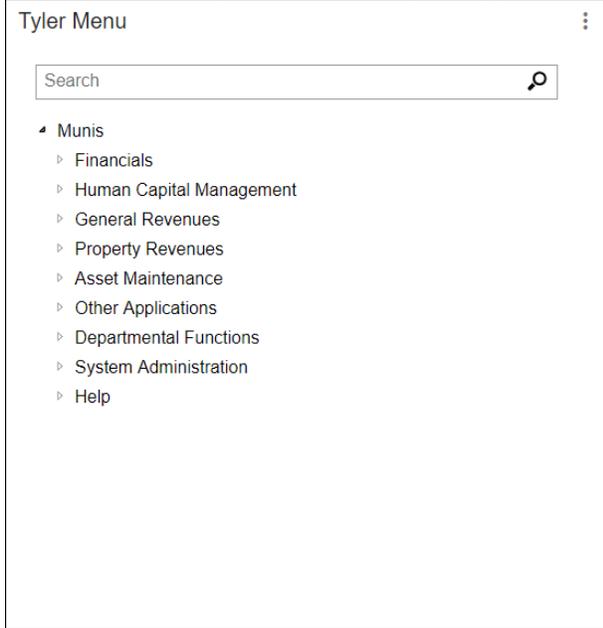
Threshold cards automatically update the card display when custom conditions are met. For example, if more than \$50,000 is spent, this card is set up to change from green to orange.



Tyler Menu

Card Type: List

This card displays the Tyler Menu, which supports integrations with multiple Tyler products, including EnerGov, Tyler 311, and ReadyForms. For Munis users, this card can be configured to display SSRS reports and/or report applications in the Card Designer.



User Links

Card Type: List

The User Links card provides links to frequently accessed programs. For example, clicking the Who Are My Pending Applicants? link opens the Pending Applicants program.

