

Tyler Hub User Guide 2019.3 October 2019



Contents

1	INTRODUCTION
2	TYLER HUB
2.1 2 2 2	Omnibar
2.2	Menu and Sidebar
3	ONBOARDING
4	HOME PAGE14
4.1	Environment Banner 15
4.2	Banner Card 15
4.3	Narrative Card15
5	TYLER MENU16
6	FAVORITES
6.1	Adding a Menu Program18
6.2	Adding a Category 18
6.3	Adding a Custom Favorite19
6.4	Editing a Favorite or Category19
6.5	Deleting a Favorite or Category19
6.6	Reorganizing Favorites19
7	PAGES
8	MANAGE CONTENT



8.1	Modify Page 2	2
8.2	Publish Page	3
8.2.	Publishing a Page to the Content Library	4
8.2.2	2 Deleting a Page from the Content Library	5
8.3	Edit My Pages 2	5
8.3.	1 Setting the Home Page 2	7
8.3.	2 Restarting Onboarding 2	8
8.4	Content Library 2	9
8.4.	1 Cards 2	9
8.4.2	2 Pages	0
8.4.	3 Content Bundles	2
9 AI	DMINISTRATION	6
APPEN	IDIX A—CARDS	7
Using	the Card Designer	7
Addin	g Links to Cards	3
Settin	g a Threshold Value for a Card 4	8
Settin	g a Automatic Refresh Time5	0
Applyi	ng a Filter5	2
Modif	ying Card Data and Presentation5	4
Option	ıs 5	5
Visual	izations 6	4
APPEN	IDIX B—VISUALIZATIONS6	5



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.

	=	🐝 My Tylertown Home Page	Search			۵	• • • •	←—Omnibar
	↑ ≡	Tylertown					÷	←—Banner
Sidebar —→	*	1 6	* 	7 🦾 🗸	0 *		 I 	
	× 0	Approvals	Notifications	Alerts		🐝 tyler		
	>	Sourch Mants Financials Human Capital Management Annon Capital Management Another Man	۰ ۹	Recent Activity Incliana Form 9 Report System Settings Project Builder Workflow Business Rules Workflow Business Rules Workflow Business Rules Grant Master Time Enry Standard Report Recruiting Department al functions My Saved Reports Account Inquiry YI D Budge Report Vendor Inquiry	· · · · · · · · · · · · · · · · · · ·	Tyler Links Tyler Search: Find just what you are looking for Tyler Community: Join thousands of other clients online Tyler Support: Let us help you Tyler Tech website: The leader in public sector software	:	← 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.

≡	Budget Monitoring	Search	٩	0 B

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.

←	BACK		invoice		Q		\$
Filters		CLEAR	MENU PROGRAMS (35) RECORDS (20)	HUB CO	DNTENT (17)		Í
	General Revenues	15				Sort by Name: A to Z ▼	
	Asset Maintenance	1	Adjust Invoices	Z	Create General Billing Invoices		
	Property Revenues	2	Munis>General Revenues>General Billing>Invoice Processing>Adjust Invoices		Munis>Asset Maintenance>Accounting>Create General Billing Invoices		
	Financials	17					
			Customer Invoice Report	Z	Fremont Invoice Import	3	
			Munis>Property Revenues>Permits and Code Enforcement>Reports>Collections/Billing>Customer Invoice Report		Munis>General Revenues>General Billing>Site Specific Functions>Fremont Invoice Import		



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

÷	BACK		invoice								(ર			\$
Filters		CLEAR	MENU PROGRAMS (35)	RECORDS (20)	HUB C	ONTENT (17)								•
	General Revenues	15											Sort by Name: A to	oz ▼	
	Asset Maintenance Property Revenues Financials	1 2 17	Adjust Invoices Munis>General Revenue Processing>Adjust Involo	s>General Billing>Invoice les	Z	Crea Munis Billing	Asset M Novices	neral B aintenanc oice Ad	Billing Ir ce>Accour	nvoice: nting>Cre	S eate General	Z	0	9 🚺	
	- John -		Customer Invoice Munis>Property Revenue Enforcements Reports>C Invoice Report	Report ess-Permits and Code oilections/Billings-Customer	2	Back Back Infe Batch Infe Batch Nu Entry Dat Processin Clerk Effective I GL Effective GL Year/P Descriptio Departm Life Cycle	Q Search	Browse		Update	Resume Batch	View View	Prot Batch		~~~~
						« <			0 of 0		>	>	Resume the current Batch.		

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.

÷	BACK		invoice	Q		\$
Filters		CLEAR	MENU PROGRAMS (35) RECORDS (20) HUB CO	DNTENT (17)		^
	Page	3			Sort by Name: A to Z	
	Card	14	Active Invoices: How is productivity? Type: Card Active Invoices: How is productivity?	Invoice 3-Way Match Type: Card Invoice 3-Way Match		
			Invoice Monitoring + Type: Page Monitor current invoices, what is due, overdue, pending, and discounted. What needs to be paid and further filter by.	Invoice Processing + Type: Page Invoice processing page contains open batches, batch reviews and productivity of active invoices. Further analyze,		



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.

Global Search energov				
CORDS LIBRARY MENU				_
🤸 Global Search	energov			
RECORDS LIBRARY	MENU			
Content Type	^	Global Search	energov	
Cards	0	RECORDS LIBRARY	MENU	
Pages	1	System	^	_
Tular Enderred		EnerGov	0	
		Munis	0	
Yes	1	ReadyForms	0	
		Tyler 311	0	
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Tyler EAM	0	

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.

≡	Search Search		۹ 🕐	8
<b>A</b>	I want to focus on	?	Help	:
≔		*	Tyler Community	
*	Revised		Tyler University	
			MyView	:
<b>*</b> *	S400,949		Tyler Support	
\$	Spent Available	i	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 <u>Menu, Favorites, Pages, Manage Content</u>, 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.

= 🔆 Tyler Hub Search						۹	0 <b>0</b>
	Welcome to Tyler Hu	b					
	1 Select Areas	2 Select Conte	ent Sur	3 mmary	Finish!		
	Let's start making Hub Select the areas you wo	<b>yours.</b> ork in.					
		S	Î	ä	<b>B</b>		
	Asset Maintenance	Citizen Services and Revenue	Financial Management	Human Capital Management	Permitting and Land Management		
	System		Utility Management		Workflow		
					NEXT		

**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.

Welcome to Tyler Hub 2 3 4 1 Select Areas Let's start making Hub yours. Select the areas you work in Human Capital Asset Maintenance Citizen Services a inancial Manage Revenue Management Permitting and Land Utility Management Workflow Management NEXT





#### 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.

		2	3	•
Selec	t Areas	Select Content	Summary	Finish!
PAGE	S BUNDLES	RECOMMENDED		
	Budget Monitoring	Inven	tory	Invoice Monitoring
	Budget Monitoring p	age shows Inven	tory analysis page contains	Monitor current invoices, what is
	the current budgets,	fund count	cards of items pending	due, overdue, pending, and discounted. What peode to be
	budgeting trends.	stale	stock. Additional analysis	paid and further filter by
		is ava	ilable o	department and clerk an
	Selec	t Page	Select Page	Select Page
	Invoice Processing	Invoid	ce Trending	Purchasing Activities
	Invoice processing p	age Trend	ing analysis of invoices	Displays information related to
	contains open batch	es, batch over t	ime, payment trends by	purchasing tasks and data.
	reviews and product	ivity of due d	ate, discount date of after	Includes a recent requisitions
	work by individual cl	erks availa	ate. vendor analysis ble on Payment T	orders bar chart, and
	Color			Orlant Dama

**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.

Welcome to Tyler Hub										
<b></b>			3	4						
Select Ar	eas	Select Content	Summary	Finish!						
Here's the con	Here's the content you selected.									
Please choose	a page as y	our Home Page.								
<b>↑</b>	Budget Mo Budget Mon and budgetir	nitoring itoring page shows the current budge ng trends.	ets, fund breakdown, and spend	ing						
	Inventory Inventory and stock and sta	lysis page contains count cards of it le stock. Additional analysis is availa	ems pending receipt, items belo ble on inventory usage, p	w						
ВАСК				NEXT						



5. Click Next to advance to the final screen.

Welcome to Tyler Hu	b		
<b>Ø</b>		<b>~</b>	
Select Areas	Select Content	Summary	Finish!
	I		
	Nice V	Vork	
	Let's see your ne	ew home page!	
ВАСК			DONE

6. 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.

= `	Sudget Monitor	ing Search						۹ 🛛 😫
 ≡★	I want to focus on.	Terre No items selected	⇔ <b>s</b>	Revised	\$8.3B	: Spent	\$400,949	+ \$8.3B
	Current Segment B	udget: What segment	s are within budget?				Segment Breakdown	:
1	Description	Code	Revised	Spent	Available	Over Budget		
~	TRANSPORTATION	996	\$270,280.50	\$0.00	\$270,280.50			Requisition     Actual     Encumbrance
	MIDDLE SCHOOL 3	940	\$1,142,835.75	\$0.00	\$1,142,835.75		8 0B	
	BUILDING	92	\$0.00	\$0.00	\$0.00		0.00	
	SALARIES	1	\$17,244,501.78	\$0.00	\$17,244,501.78		8.08	
	CDBG GRANT 2005	CS	\$0.00	\$0.00	\$0.00			
	MUSIC	206	\$430,237.50	\$0.00	\$430,237.50		Spending and Budget Trends	:
	TRANSFER FACILITY	258	\$411,985.35	\$0.00	\$411,985.35		. 1	
	GENERAL GOVERNMENT	1	\$3,144,189.43	\$43,212.86	\$3,100,976.57		\$8.08 - \$7.08 -	
	ELEMENTARY SCHOOL	198	\$1,365,779.10	\$0.00	\$1,365,779.10		\$5.08 - \$4.08 -	
	PARKS AND RECREATIO	177	\$352,379.75	\$0.00	\$352,379.75		\$3.0B - \$2.0B -	
	NORTHSIDE MIDDLE	811	\$0.00	\$0.00	\$0.00		\$1.0B - \$0	
>	80 total				K < 1 2	3 4 5 > >	2017	



# 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.

My Tylertown Home Page Search		Q Ø 8
Tylertown	<b>7</b> <i>·</i> 0	: •
Approvals No	Favorites           Recent Activity           Indiana Form 9 Report           System Settings           Project Builder           Workflow Gusiness Rules           Workflow Groups           Time Entry Standard Report           Grant Master           Time Entry Standard Report           Recruiting           Departmental Functions           My Saved Reports           Account Inquity	Tyler Links       ;         Tyler Search: Find just what you are looking for       ;         Tyler Community: Join thousands of other clients online       ;         Tyler Support: Let us help you       ;         Tyler Tech website: The leader in public sector software       •

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.

≡	🐝 My Tylei	rtown I	Home Page Search			
*	Home Page		Live			
=	Tyler Menu		Tylerto	own	Edit Pages	
*	Favorites		.4	6 :	Group Pages By:	
5	Pages	~		° I	Functional Area	
/	Manage content	^	Approvals	Notif	Home Page:	
	Content Library		Tyler Menu			5
	Edit My Pages				Asset Maintenance	
~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		ions	Asset Performance Analytics	

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.

≡	🐝 My Tylertown Home Page	Search	۹	08
	Live			
	🗶 Tylertown			÷

# 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.

👑 Tylertown

## 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.

Tyler Menu					
Search					
~ N	ſunis				
>	Financials				
>	Human Capital Management				
>	General Revenues				
>	Property Revenues				
>	Asset Maintenance				
>	Other Applications				
>	Departmental Functions				
>	System Administration				
>	Help				

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 F**AVORITES

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.

Favorites	:
Apply Late Fees	
System Admin	^
No favorites have been added to this category.	
General Revenues	^
Payment Entry	
Customers	
System Administration	^
System Update	
User Attributes	
System Settings	
Roles	
Helpful Links	^
Google	
Miscellaneous	~



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.

Edit Favorites		
TYLER MENU ADD CUSTOM ADD CATEGORY	FAVORITES MENU EAM and UB Erdit Eavoritage	
<ul> <li>Munis</li> <li>Financials</li> <li>Human Capital Management</li> <li>General Revenues</li> <li>Property Revenues</li> <li>Asset Maintenance</li> <li>Other Applications</li> <li>Departmental Functions</li> <li>System Administration</li> <li>Help</li> </ul>	Recert Activity     Munis Data Int     TruLER MENU     ADD CUSTOM ADD CATEGORY     Munis Data Int     TruLER MENU     ADD CUSTOM ADD CATEGORY     Category     Category     w      Category     w      TruleR MENU     Tr	FAVORITES MENU  EAM and UB  Recent Activity  Munis Data Integrity Assi  Tax Tables  Utility Billing Customers Utilities Utilities Utilities Utilities
CLEAR SEL Edit Favorites TYLER MENU ADD CUSTOM ADD CATEGORY New* Helpful Linkd	FAVORITES MENU = EAM and UB	Final Bill Process     Bill Adjustments     Route Book/Blank Forms/Ca     Bill Run Process     Delinguency Manager     Apply Late Fees     Cutoff Process Cancelatio
	Munis Data Integrity Assi     Tax Tables     Business Accounts (2)     Utility Billing Customers     Utilities     UB Work Order/Print     Final Bill Process     Bill Adjustments     Route Book/Blank Forms/Ca     Bill Run Process     Delinquency Manager     Apply Late Fees     Cutoff Process Cancelatio	
	CANCEL SAVE	

## 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.
- 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.
- Click the Delete button. The program displays a confirmation message.
- 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.

Edit Favorites		FAVORITES MENU	
Tyler Menu     ADD CUSTOM     ADD CATEGORY       Search     Q       ✓ Munis     Financials       > Human Capital Management       > General Revenues       > Property Revenues       > Asset Maintenance       > Other Applications       > Departmental Functions       > System Administration       > Help	FAVORITES MENU EAM and UB Recent Activity UB Work Order/Pr Purchasing Setto Munis Data Integr Tax Tables Business Accoun Utility Billing Cust Utilities Final Bill Process	FAVORITES MENU  EAM and UB  Recent Activity  Bill Adjustments  Purchasing Settings Munis Data Integrity Assi Tax Tables Business Accounts (2) Utility Billing Customers Utilities Final Bill Process Route Book/Blank Forms/Ca	^ II
CLEAR SELECTED ADD ->	Bill Adjustments Refigure Adjustment Bill Run Process Delinquency Man Apply Late Fees	Bill Run Process Delinquency Manager Apply Late Fees ager CANCEL SAVE	

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.

A	Home Page		
≔	Tyler Menu		
*	Favorites		
	Pages ^		
	Account Receivable		
	Business Licenses		
	Munis Payroll		

Page groupings in the sidebar are controlled by the Group Pages By setting in the Edit My Pages option in the <u>Manage Content</u> 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 <u>Cards</u> 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*		
Description Welcome to Tylertown! This page contains useful cards including the Tyler menu along links to commonly visited websites.	22 / 123 with the favorites programs and handy	3
Select a thumbnail for your page BROWSE	Thumbnail Preview	
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		
	CANCE	PUBLISH

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.





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.

Update this page				
A newer version of this page is available. Would you like to update now?				
Don't ask again about updating this Page.				
CANCEL	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.

			Publish Page to Library		
			Title * Permitting by User Description This page contains useful cards		18/123
Content Library				Search	۹
Vier Content Only		Additional analysis is available You siready have a version of this page. ADD F	AGE Vita stready https://www.action AGE ADD PAGE	work by individual clerks and You already have a version of this page. ADD PAGE	
Cards (217)	~	Payroll Trending	Permitting	Permitting by User	
Pages (23)	*	Displays information on current	Current information about permits	This page contains useful cards	
Content Bundles (1)	*	count cards that show high and low accrual balances, bar charts showing accruals and hours	filter card to focus on a single project or department, Unpaid Issued and Completed Permits	the favorise programs and handy links to commonly visited Tyler websites.	
		You already have a version of this page. ADD F	AGE ADD PAGE	Tou already have a version of this page. ADD PAGE	Р

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.

Munis Reporting Center	My Page		
The Munis Reporting Center has all the key Hub cards for your reporting needs. The list of reporting programs as well as the list of reports that have	Welcome to Tylertown! This page contains useful cards including the Tyler menu along with the favorites programs and handy links to commonly visited websites.		
You already have a version of this page. ADD PAGE	You already have a version of this page. ADD PAGE		

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 userdefined name.

Edit Pages	
Group Pages By: None *	Edit Pages
✿ Home Page: Munis Landing Page	Group Pages By: None +
AP	✿ Home Page: Munis Landing Page
Business Licenses	AP
Munis Landing Page	Business Licenses
Permitting	Munis Landing Page
Permitting by User	Permitting
New Page	Permitting by User
ADD	New Page
	ADD CANCEL SAVE

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.

Edit Pages		
Group Pages By:		
None 👻		
A Home Page:		
Munis Landing Page	*	
AP		
Business Licenses	-	
Munis Landing Page		
Permitting		
ADD	CANCEL	SAVE

• 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.

dit Pages				
Group Pages By:	Edit Pages	Edit Pages	Edit Pages	
	Group Pages By:	Group Pages By:		Edit Pages
Munis Landing Page	Munis Landing Page	Product	Group Pages By:	Group Pages By:
Financial Management Budget Monitoring	ERP / Financial	Munis Landing Page	Munis Landing Page	Munis Landing Page
Inventory	Budget Monitoring Employee Review	Munis Budget Monitoring	Accounts Payable Invoice Monitoring	Budget Monitoring
Invoice Monitoring	Hiring	Employee Review	Invoice Processing	Employee Review
Invoice Trending	Inventory	Inventory	Invoice Trending	Hiring
ADD C.	Invoice Monitoring	Invoice Monitoring	Budget Budget Monitoring	Inventory
	ADD	ADD	Human Resources	Invoice Processing
				- ADD CANCEL SAV

• 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		
Orana Danas Da		
Group Pages By:		
None 👻		
A Home Page:		
Munis Landing Page	¥	
AP		
Business Licenses		
Munis Landing Page		
Permitting		
	0411051	0.11/5
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		Ŧ	
Home Page: Munis Lan	ding Page	Ť	
AP			
Business	Licenses		
Munis La	nding Page		
Permittin	g		
Permittin	g by User		
ADD		CAN	CEL 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.

	Edit Pages	
	Group Pages By: Functional Area	
Sta	art Fresh	
Thi bao This	is will remove all your current content and take you ck through the Hub onboarding process. s process cannot be un-done. Please check this box to confirm!	
	Confirm	
	CANCEL CONTINUE	
	Invoice Processing	
	Invoice Trending	
	Purchasing Activities           ADD         START FRESH         CANCEL         SAVE	

Select the Confirm check box and then click Continue to begin the onboarding process again. Refer to the <u>Onboarding</u> 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, userdefined pages and cards are hidden, and only Tyler-provided content is shown.

Content Library				Search	۹
X Tyler Content Only	Pa	ges are a grouping of cards that together make a task ba	ased theme.		
Cards (231)	~	Asset Performance Analytics	Billing Activities      Review the billing activities in	Billing Activities - Munis 2017	
Pages (37)	~	for analyzing and reporting on asset attributes, work history and any financial information associated with the asset or	Utility Billing with a focus on bill runs in progress, reading exceptions and meter readings. A billings calendar shows wha	Utility Billing with a focus on bill runs in progress, reading exceptions and meter readings. A billings calendar shows wha	
Content Bundles (0)	~	You already have a version of this page. ADD PAGE	You already have a version of this page. ADD PAGE	You already have a version of this page. ADD PAGE	
		Budget Monitoring	Building Permits Overview	Business Licenses	
		Budget Monitoring page shows		Current information about	~~~~

### 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.

Content Library		Search	۹
🐝 Tyler Content Only 🛛	Cards contain customizable data easily displayed on a page for quick reference or deeper analysis.		
Cards (204)	Blank Card  A blank card that can be the starting  This card displays the Tyler Technologies	1-30	
Citizen Services and Revenue 22	point in creating your own card.	bills that are 1-30 days late along with the total amount owed	
Financial Management	7x6 Blank 7x4 Narrative	4x2 Double Count	
Human Capital Management 25		<u>у</u> . Ц	
Permitting and Land (14 Management	31-60 61-90 ♥ ● ♥ ●	91-120 🐠 🔹	
System     16       Utility Management     37	This card shows the number of bills that are 31-60 days late along with the total amount owed owed owned to the total amount owed bills that are 51-90 days late along with the total amount owed owned to the total amount owed bills that are 51-90 total total amount owed bills that are 51-90 total total amount owed bills that are 51-90 total total total amount owned bills that are 51-90 total to	This card shows the number of bills that are 91-120 days late along with the total amount owed	
Workflow	4x2 Double Count 4x2 Double Count	4x2 Double Count	
Pages (29)	Accruals Active Database Connections	Active Invoices: How is	
Content Bundles (2) 🗸 🗸	This bar chart compares the available accural with the used accural amount for the employer. The accural set of how many current active grouped by the accural type.	This bar chart shows the total number of Invoices by clerk. Selecting a bar on the graph opens a data table with the details of the clerk selected.	
	Page:My Tylertown Home Page CHANGE	CLOSE	ADD 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.

Content Library				Search	
Strain Content Only		Pages are a grouping of cards that together make a task based	theme.		
Cards (204)	~	Billing Activities	Budget Monitoring	Business Licenses	
Pages (29)	^	Review the billing activities in Utility Billing with a focus on bill	Budget Monitoring page shows the current budgets, fund breakdown, and spending and	Current information about business licenses and associated businesses and	
Asset Maintenance	7	exceptions and meter readings. A billings calendar shows wha	budgeting trends.	bills. Cards include a filter card to focus on a single category	
Citizen Services and Revenue	3	You shready how a version of the page A	You already have a version ADD DAGE	You alreedy	
Financial Management	6	rever version la available. UPDATE PAGE	of this page. ADD PAGE	of this page. ADD PAGE	
Human Capital Management	4	Code Enforcement	Customer Trending	EAM Analytics Center	
Permitting and Land Management	2	The code enforcement page is a one stop shop for an overview of your organization's	Utility Billing customer events and trends, Citizen Requests, Shut offs, and Move outs.	Analyze your EAM Assets by reviewing their key performance attributes. Visualize the results	
System	4	complaints and violations. This is helpful for managing citizen	Analysis of top ten consumption accounts and	in a list or a map, or create an Ad-hoc Report with the	
Utility Management	4	You already here a version of this page A neuror version a version version a version version	Vocusinedy hypera e vention of this page A namer vention upDATE PAGE	You already hope a version of this page. ADD PAGE	
Workflow	(4)	FAMI and ing Dage	Employee Deview	Line	
Content Bundles (2)	~				
		This page contains useful cards such as Tyler menu and favorites as well as key Asset Maintenance information of unassigned work	Employee Review analysis page contains WorkFlow cards (Approvals, Notifications, Alerts), a data table card to	Hiring overview analysis page contains count cards for Open Positions, Upcoming Interviews and Newest Applications; a data	
		ADD CUSTOM PAGE			CLOS

### 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.

Test Tyler Menu Page				
This page contains useful cards including the Tyler menu along with the favorites programs and handy links to commonly visited Tyler websites.				
You already have a version of this page.	ADD PAGE			

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.

Content Library				Search	
Vier Content Only	-	Pages are a grouping of cards that together make a task base	ed theme.		
Cards (204)	~	Billing Activities	Budget Monitoring	Business Licenses	
Pages (29)	~	Review the billing activities in Utility Billing with a focus on bill runs in progress, reading	Budget Monitoring page shows the current budgets, fund breakdown, and spending and	Current information about business licenses and associated businesses and	
Content Bundles (2)	~	A billings calendar shows wha	budgeting trends.	bills. Cards include a filter card to focus on a single category	
يرين منز مستر			You already ADD PAGE	You already type a version ADD PMSE	السور
		This page contains useful cards such as Tyler menu and favorites as well as ky Asset Maintenace information of unassigned work	Employee Review analysis page contains WorkFlow cards (Approvals, Notifications, Alerts), a data table card to	Hiring overview analysis page contains count cards for Open Positions, Upcoming Interviews and Newest Applications; a data	
		ADD CUSTOM PAGE			CLOSE



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

New Custom Page	
New Page Title * New Page	
Please select a page layout	
1 2 3 4 1 2 5	blank
6 3 4	
	CANCEL CREATE PAGE

- 3. Enter the page title.
- 4. Select a layout option.
- 5. Click Create Page.

The screen refreshes to display the custom page.

Search Search			٩	
Card1	: Card2	i		
	Click to configure 🖈	Click to correlation 🖈		
Card3	I Card4	I		
	Click to configure	Click to configure 🖈		

6. 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 <u>Using Card Designer</u> 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:

- 1. 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.
- 2. 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.

Content Library								Search		
		Content Bund	dles are a collection of	pages that can be g	prouped together for qu	ick access to related co	ontent.			
🐝 Tyler Content Only			Business Licenses					Pages: 1	~	
Cards (254)	~		Purchasing Content Bu	indle				Pages: 5	^	1
Pages (40)	~		Description This content bun	dle features purchasin	q-specific pages.					
Content Bundles (2)	^		Pages Inventory							
Citizen Services and Revenue	1		Inventory a	nalysis page contains co ind related purchase ord	ount cards of items pending n	eceipt, items below stock and	d stale stock. Additional analysi	s is available on inventory	r usage,	
Financial Management			Invoice Moni	toring						
Workflow	1		Monitor cur trends.	rent invoices, what is du	e, overdue, pending, and disc	ounted. What needs to be pa	id and further filter by departme	ent and clerk and analyze	payment	
			Invoice proc	cessing page contains o	pen batches, batch reviews a	nd productivity of active invo	ices. Further analyze work by ir	dividual clerks and statu	s of invoices	
			Invoice Trend	<b>ling</b> alvsis of invoices over ti	ime, payment trends by due d	ate. discount date of after du	ie date. Vendor analysis availab	le on Pavment Trends: W	hat vendors	
			have been p	oaid?			,	,		
			Displays inf	ormation related to purc	chasing tasks and data. Inclu	les a recent requisitions data	a table, recent purchase orders l	par chart, and purchasing	user links	
								EDII	APPLY BUND	
		ADD NEW BUND	ILE							CLOS
The system di	splavs	s the	Content B	undle Ed	ditor dialo	a box.				
Content Bundle Editor					,	,				
Content Bundle Name		🎸 тук	er Content Only 🏾 🗩		Select a filter	-	Search		Q	
	0 / 10	-		- An-lation						
Description	0710	Ŭ	Asset Performanc	e Analytics	Billing Activities		Billing Activities - N	1unis 2017		
			Provides tools and resources for analyzing and reporting on asset attributes, work history		Review the billing activities Utility Billing with a focus of runs in progress, reading	in bill	Review the billing activities in Utility Billing with a focus on bil runs in progress, reading	100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 -		
Dance in this hundle	0 / 25	0	and any financial information associated with the asset or		exceptions and meter read A billings calendar shows v	ngs. iha	exceptions and meter readings. A billings calendar shows wha.			
No pages have been added			\$	ADD TO BUNDLE	4	ADD TO BUNDLE	\$	ADD TO BUNDLE		
			Budget Monitoring		Building Permits	Overview	Business Licenses			
			Budget Monitoring page show		6		Current information about			
			the current budgets, fund breakdown, and spending and budgeting trends.	Construction of the second sec		SAMPLE	business licenses and associated businesses and bills. Cards include a filter card to focus on a single category	0		
			\$	ADD TO BUNDLE	- 🖗	ADD TO BUNDLE	*	ADD TO BUNDLE		
			Business Licenses	;	Business Licens	ing	Code Enforcement			
			O Current information about bus	iness 🛄 🛤 📖	EnerGov page one created		The code enforcement page is			
								CANCEL	SAVE	

- 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.

5. 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.

Content Bundle Editor				
Content Bundle Name	🀝 Tyler Content Only 🕞	Financial Management 👻	Search	Q
Purchasing Content Bundle 25 / 100	Budget Monitoring	Inventory	Invoice Monitoring	
Description This content bundle features purchasing-specific pages. 557 250	Budget Monitoring page shows the current budgets, that the shows of th	The second secon	Montor current invoices, what is due, overthe, pending, and discounted. What needs to be paid and further fifter by department and clerk and.	
	ADD TO BUNDLE	in Bundle		
Inventory X				
Invoice Monitoring X	Invoice Processing	Invoice Trending	Purchasing Activities	
Invoice Processing X Invoice Trending X Purchasing Activities X	Invoice processing page contains open batches, batch reviews and productivity of active invoices. Further analyze unche individuel lorder and	Trending analysis of invoices over time, payment trends by due date, discount date of after due date, vendor analysis switchhoe no Rummod Tronder	Displays information related to purchasing tasks and data. Includes a recent requisitions data table, recent purchase orderes ber check and	1
			CANCEL	SAVE

6. 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:

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

Content Library			Search	
		Content Bundles are a collection of pages that can be grouped together for quick access to related content.		
VIEr Content Only		Business Licenses	Pages: 1	~
Cards (254)	~	Purchasing Content Bundle	Pages: 5	~
Pages (40)	~			
Content Bundles (2)	^	Purchasing Content Bundle	Pages: 5	
Citizen Services and Revenue		Description This content bundle features purchasing specific pages.		
Financial Management	1	Eages Inventory		
Workflow	1	Inventory analysis page contains count cards of items pending receipt, items below stock and stale stock. Additional analysis payments and related purchase orders.	is available on inventory usage,	
	~~~	Invoice Monitoring  Monitor current invoices, what is due, overdue, pending, and discounted. What needs to be paid and further filter by department trends. Invoice Processing	t and clerk and analyze payment	A
		Invoice processing page contains open batches, batch reviews and productivity of active invoices. Further analyze work by Ind Invoice Trending	ividual clerks and status of invoices	
		Trending analysis of invoices over time, payment trends by due date, discount date of after due date. Vendor analysis available have been paid?	on Payment Trends: What vendors	
		Purchasing Activities O Displays Information related to purchasing tasks and data. Includes a recent requisitions data table, recent purchase orders ha card.	r chart, and purchasing user links	
			EDIT APPLY BUNDLE	

3. 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.

Content Library			Search		۷
		Content Bundles are a collection of pages that can be grouped together for quick access to related content.			
Yier Content Only		Business Licenses	Pages: 1	~	
Cards (254)	~	Purchasing Content Bundle	Pages: 5	~	
Pages (40)	~				
Content Bundles (2)	~	Purchasing Content Bundle	Pages: 5		
Citizen Services and Revenue	1	Description This content bundle features purchasing-specific pages.			
Financial Management	1	Pages Inventory			
Workflow	1	Inventory analysis page contains count cards of items pending receipt, items below stock and stale stock. Additional analysis is a payments and related purchase orders.	available on inventory usage,		
		Invoice Monitoring			
m	\sim	Monitor current invoicee, what is due, overdue, pending, and discounted. What needs to be paid and further filter by department an trends.	nd clerk and analyze payment	~~~~~	~~~~~
		Invoice Processing			
		Invoice processing page contains open batches, batch reviews and productivity of active invoices. Further analyze work by individ Invoice Trending	lual clerks and status of invoices		
		Trending analysis of invoices over time, payment trends by due date, discount date of after due date. Vendor analysis available on have been paid?	Payment Trends: What vendors		
		A Purchasing Activities			
		Displays information related to purchasing tasks and data. Includes a recent requisitions data table, recent purchase orders bar cl card.	hart, and purchasing user links		
			EDIT APPLY BUNDLE		

3. Click Edit.

The program displays the Content Bundle Editor dialog box.



4. Click Delete.

The system displays a confirmation message.

Content Bundle Editor				
Content Bundle Name	Tyler Content Only	Select a filter	Search	Q
Purchasing Content Bundle				
25/100 Description This content bundle features purchasing-specific pages.	Asset Performance Analytics Provides tools and resources for analyzing and reporting on asset attributes work hatory	Billing Activities	Billing Activities - Munis 2017	
55/250 Pages in this bundle	and any financial information associated with the asset or	exceptions and meter readings	exceptions and meter readings. A billings calendar shows what	
Inventory × twoice Monitoring ×	Budget Monitor	undle tet this content bundle?	Business Licenses	
Invoice Processing X	Budget Monitoring page 4 the current budget fund breakdown and spending budgeting brends.		Current information about business licenses and associated businesses and bills. Cards include a filter card	
Purchasing Activities X	ADO TO BUNDLE	ADD TO BUNDLE	to focus on a single category	
	Business Licenses	Business Licensing	Code Enforcement	
DELETE	Content intornation about pusiness	cherolog page one created -	CANCEL	UPDATE

5. 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.

≡	😑 🐝 My Tylertown Home Page 🛛 Search										
÷	Home Page	= 🎸 Administra	Administration Search								
:=	Tyler Menu	Live									
*	Favorites	Administration	GENERAL SITE BANNERS TYLER UNIVERSITY MAP SETTINGS								
55	Pages	General Settings	Time Zone			×					
1	Manage content	General Settings	Toolbar Settings			~					
\$	Administration	User Management	Onboarding Settings			~					
		User Maintenance Role Maintenance	Favorites Url Converter			~					
		System Settings System Data Access External Systems Tyler Id Configuration Logs and Diagnostics									
		Import Export Library Content User Information									

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.

≡	Search Search				۹	08
^ ≡ *	i Invoices Discounted	: Invoices Overdue	75 E	26	: Invoice 3-Way Match	:
/	Department and Clerk Filter	Invoices: What needs to be	paid?			÷
¢	Department Clerk No items selected No items selected TELER	Invoice Number Invo	oice Date Vendor Name	Status	Description In	voice Total
		100MHS 9/1	/13/2016 One Time Vendor	Approved		\$5.00
		4560 6/5	/30/2016 KNM SUPPLY COMPANY	On Hold	supplies	\$989.10
	Payment Trends	4560 6/3	/30/2016 KNM SUPPLY COMPANY	Approved	supplies	\$989.10
		5987 6/2	/22/2016 DEF SUPPLY COMPANY	Approved	Pool Noodles (5 col	\$10.00
		5264 6/2	/21/2016 JOHNS JELLYBEANS	On Hold	8 lbs of jelly beans	\$80.00
	Currently Due Past Due	5983 6/1	/14/2016 KNM SUPPLY COMPANY	On Hold		\$30.00
	Received Disco	245613890 6/1	/14/2016 ABC SUPPLY COMPANY	On Hold	Desks	\$9,500.00
	76	5976 2/1	/15/2016 DEF SUPPLY COMPANY	Approved	Miscellaneous 2016	\$10,000.00
		5979 12	2/9/2015 ABC SUPPLY COMPANY	Pending Approval	file cabinets	\$800.00
	75	5974 12	2/9/2015 ANDREW KONSTANOPOLIS	Pending Workflow		\$750.00
>		5975 12	2/9/2015 Sullivan Pool	Pending Workflow		\$250.00

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.





Card Designer		
Card Designer	2 Card Connections (optional)	3 Review & Publish
Tide+ Tyler Menu	10 / 128	(REFRESH
Data Source Empty Fields no fields selected Group Order Filter Limit Results Link	+ + + + +	
	Visualization Type: Size: Weth: Height: 6 8 Color: Auto Refresh Interval: None * Selected Menus: Munis * FILTER	ICT STYLE

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.

15/128	Preview		C REFRESH
	Permit Listings	Click to confi	
	Select Your Dataset, Fields, and Optic	ons	Search
	Dataset	Fields - 2 selected	Options
	Permits Applied Valuation YOY	Dept Name	
+	Permits Applied YOY	Issued Count	
+	Permits Issued	Issued Date	
	Permits Issued Valuation YOY	Parcel	
+	Permits Issued YTD Trend	Permit Contractor	no field selected
	Permits Pending	Permit Desc	
	Permits Submitted Counts By Type Group YTD	Permit Fees	
	Permits Top Violations	Permit Status	
	Permits Unpaid	Permit Status Desc	
	Permits Unpaid Violations	Permit Type	
	Permits Violation Alerts		
	Permits Violations	Project Type	
			CANCEL SAV
	15/128 + + + +	15/128 Perview Permit Listings Select Your Dataset, Fields, and Optiv Dataset + + + Permits Applied Vov Permits Applied Vov Permits Issued Valuation VOV Permits Issued VTD Trend Permits Submitted Counts By Type Group YTD Permits Upaid Permits Upaid Permits Upaid Permits Violations Permits Viol	15/128 Perview 15/128 Permit Listings Citck to conf Select Your Dataset, Fields, and Options Image: Citck to conf Dataset Image: Citck to conf Dept Name Image: Citck to conf Permits Applied Valuation YOY Image: Citck to conf Permits Applied Valuation YOY Image: Citck to conf Permits Susced Valuation YOY Image: Citck to conf Permits Susced Valuation YOY Image: Citck to conf Permits Susced YDY Image: Citck to conf



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

	, ,	,			
Data					
Source	Permits Issued				1
Fields					
	Issued Date (IssuedDate)				
_	Permit Type (PermitType)				
Group					+
-				Display Name *	-
	Address		*	Address	
0-1-1					
Order					Ŧ
	Address		*	Ascending O Descending	
Filter					+
_	Address	*	= -	Value	
					-
Limit Resul	lts				
Link					+

- 6. 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.
- 7. Click Link to add one or more links to the card. See the <u>Adding Links to Cards</u> section for more information.



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



- 9. Define the card size, color, and automatic data refresh intervals.
- 10. 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.

Card Designer			
Card Designer Card Connections (op	otional)		3 Review & Publish
Tife* Permit Listings	15/128	Preview	C REFRESH
r enni kreinige		Permit Listings	
Data		Issued Date Permit Type	
Source Permits issued Fields	1	4/15/2019 B	
Issued Date (IssuedDate) Permit Type (PermitType)			
Group Displer Name *	+		
Address * Address			
Order	+		
Address • O Descending	II.		
Filter	+	1 total	
Address • E • Value •			
Limit Results		Visualization	
Link	+	Type: Table SELECT STYLE	
		Size: Width: Height: 7 6	
		Color:	
		Auto Refresh Interval: 0	60 10 minutes
			CANCEL NEXT

12. Click Next.

Card Designer					
Card Designer		2 Card Connect	ions (optional)		3 Review & Publish
Connections			+	Preview	C REFRESH
From Card:	Permit Listings	Field ZIP	T	C REFRESH to view the card previ	ew
Connection:	Type Filter	Operator ¥ Equal Field	*		
To Card:	Permit Listings	* ZIP	•		
Query Levels			+		
	* Level: 1		T		
	Level: 2		T		
PREVIOUS					CANCEL NEXT

The program displays the optional Card Connections step.



13. Click Next to proceed to the final step.

The program displays the Review	& Publish step.			
Card Designer				
Card Designer	Card Connections (optional)		3 Review	/ & Publish
Card Details	15 / 128	Preview	C RE	FRESH
Permit Listings	13/128	C REFRESH to view the card preview		
FooterText				
Description A blank card that can be the starting point in creating your own card.				
This card contains data from:				
Ling / minicule / monicule / minicule and Lend menegement / minicule Dataset: Permits Issued				
Publishing Preferences				
Save to AP -				
Overwrite card:				
Do you want this card automatically updated for anyone that has it?				
PREVIOUS			CLOSE	SAVE

- 14. 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.
- 15. 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.

- 6		: 2								
Assign Citizen Requests	\$	Assign \	Work Reques	ts				٠	? (
	E Back	Q Search	Email Schedule	Reject	C B Create WO Subm	A (R) it Apply to WO Auto-refre	sh Close WO Quick Create			
	Filter Red Both Servicing	quests Department		•						
	Category New Self	-Service Requ	uests	•						
	Auto-ref	resh is OFF			-					
	Reque	st number Se 1 PV 2 PV 3 PV	rvicing Depar Cate N Pot H N Pot H N Pot H	gory iole iole	Descr There hji There	iption is a gigantic pothole in is a very big pothole ri	Address Maple Drive Falmouth Maple Falmouth Maple Drive Falmouth			
	Associate Request	ed Work Orde	ers d€Number	Activity	Template	Scheduling priori Assic	ned to Requested start	Requested completic	n	
	4	_		-					* *	

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.



Card Designer		•	
Card Designer Card Connections	(optional)		3 Review & Publish
Data Source Businesses Detail Pedia Reference (Information) * Concentration Group	rt	Preview Licenses By Status 0 Visualization Type: Donut Chart 0 BLKOT STVE Size: 0 Color: 0 Color: 0 Color: 0 Color: 0	@ REFRESH 0
			_

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.

Card Designer		Add Link		
ata Source Businesses Detail Fields		Type Display Name		atus
Group Detail Status Description Filter	Clapity Name * Detail Status Description	CA	NCEL OK	63
Limit Results		+		



3. 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.

Add Link	Add Link
From Dataset	Type Tyler Menu 👻
Hub Page	
Tyler Menu	URL SELECT
Build Custom	
Socrata Link	Open Link In 💌
	Display Name
CANCEL	
	CANCEL

4. Click Select.

The system displays the Tyler Menu.

5. Use the Search bar or navigate to the program and select it from the menu.

Tyler Menu						
bus	sines	ss accounts	×			
~	Se	arch ('business accounts')				
		Business Accounts				
		Business Accounts Export				
		Business Accounts Inquiry				
		Business Accounts Report				
\sim	M	unis				
	>	Financials				
	>	Human Capital Management				
	>	General Revenues				
	>	Property Revenues				
	>	Asset Maintenance				
	>	Other Applications				
	>	Departmental Functions				
	>	System Administration				
	>	Help				
	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Human Capital Management General Revenues Property Revenues Asset Maintenance Other Applications Departmental Functions System Administration Help				

The program returns to the Add Link dialog box.



6. 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		
Туре		
Tyler Menu		٣
URL		
blmaster	SELECT	
Open Link In		
New Tab		*
Display Name		
Business Accounts		
	CANCEL	ОК

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

Card Designer	2 Card Connections (optional)
ita		
Source Businesses Detail		1
Tields Reference (<i>Reference</i>)	* Coun	t
Group		+
	Display Name *	
Detail Status Description	Detail Status Description	
Irder		+
ilter		+
imit Results		
ink		+
Business Accounts		



8. Click Next.

Card Designer								
📿 Card Designer			2 Card Connections (optional) —			- 🕄 Revie	w & Publish
Connections				+	Preview		C	REFRESH
From Card:	Licenses By Status		Field Detail Status Description	•		C REFRESH to view the card preview		
Connection:	Type Drilldown	*	Operator Equal	•				
	Drilldown Dataset: Availab Busine	le DataSets to Cor esses Detail	nnect To					
To Card:	Licenses By Status	*	Piela Detail Status Description	•				
Query Levels				+				
	* Level: 1							
	Level: 2		1					
PREVIOUS							CANCEL	NEXT

9. Click Next to proceed to the final step.

Card Designer			
Card Designer	nnections (optional)		3 Review & Publish
Card Details Title*		Preview	C REFRESH
Licenses By Status	18 / 128	C REFRESH to view	w the card preview
SubTitle			
Footer Text			
Description This chart shows a total count of all licenses displayed by status.			
This card contains data from:			
Dataset:			
Businesses Detail			
Publishing Preferences			
Save to BUSINESS LICENSES -			
Publish to Content Library Verwrite card:			
Do you want this card automatically updated for anyone that has it?			
PREVIOUS			CLOSE SAVE

The program displays the Review & Publish step.

10. Click Save.

The program closes the Card Designer and refreshes the page.



11. 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:

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

Card Designer					2 Card Conne	ections (optional)						B Revi	ew & Pu
lite* Invoices Due						12	2/128	Preview				C R	EFRESH
lata Source Fields	Invoices					1		Invoices D	ue	0	1		
Group						+							
Order						+							
Filter	Currently Due	•	Equal Not Equal	•	Value True Value Paid	+							
	Invoice Status	•	Not Equal	•	Value Voided involce	- 1							
Limit Results													
Link						+		Visualization					
								Type: Size:	Count Witth: 4	Height: 2	SELECT STYLE		
												CANCEL	N



- Card Designer 1 Card Designer Data C REFRESH Select a Visualzation Type, Sub-Type, and Options Source Fields Sub-Type Options Visualization Type Gr 2019 Placeholder Icon Group Open Folder E Line Double Ε Orde Gauge Detai List Er Filter AF Filter Mar Month Limit Results Link Viewe CANCEL SAVE 0 SELECT STYLE Width: Height Size 13 4 Color: Auto Refresh Interval: 0 60 0 minutes CANCEL NEXT
- 2. In the Visualization group, click Select Style. The system displays the Card Types dialog box.

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

4. Click Save.

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

Visualizat	tion			
Type:	Count		0	SELECT STYLE
Size:	Width: 6	Height: 2		
Color:		*		
Auto Refr	esh Interval:	0 0-		60 0 minutes
Threshold	ds			+
	Condition — Less Than	*	Value 1500	Color

- 5. 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.
- 6. Click Next.

The Card Designer displays the optional Card Connections screen.

- Click Next. The Card Designer provides the Review and Publish screen.
- 8. 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:

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



rd Designer			
Card Designer 2 Card Conne	ections (optional)		3 Review & Publ
ata		Preview	C REFRESH
Source Invoices Fields		Active Invoices: How is productivity?	
= Invoice Number (InvoiceNumber) * Court	nt	Invoice Number	
Group Display Name *	+	Munis	
		jean Mark Morrill	
)rder	+	hbiron	
Invoice Number * O Ascending O Descer	nding 📋	Brian Randle	
ilter	+	Grant Jewett	
imit Results 10		jdavin	
ink	+	Sarah	
		0 10 20 30 40 50 60	70 80 90 100
		Visualization	
		Type: Bar Chart - Horizontal ? SELECT STYLE	
		Size: Width: Height: 12 8	
		Color:	
		Auto Refresh Interval: 0	— 60 30 minutes
			CANCEL NET

The program displays the Card Designer dialog box.

- 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.

🤣 Worl	k Order Queu	e Searct	1					۹ 🖩
A		0		16 🧯 📫	0	÷	Open Work Orders	< 1
Una	ssigned Emerg	gency 🗹	Unassigned V	Vork Ord	On Hold Work Orders	2		
Work Orders	s: what are the	e current ass	signments ?			:	6	New Approved In progress
Nork Order	Date Entered	Status	Requesting Department	Activity	Description		21	
595	10/5/2018	New	City Garage	SHOCK	SHOCK			
193	10/5/2018	Approved	Building Department	Paint	2000		10	
547	10/1/2018	New	City Garage	SHOCK	SHOCK			
164	10/1/2018	Approved	Maintenance	General AC Maintenance	Service Request			
997	9/28/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		Work Order Locations	1
986	9/26/2018	In progress	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		Find address or place	a
971	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		LAC ART	
970	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac			AN REST
5969	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		NORTHAMERICA	EUROPE O
5968	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		Atlantic	
5946	9/26/2018	Approved	Public Works	Mowing the grass	Vegetation		fic Ocean	AFRICA +
					_		- Andrew	

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



🛚 🤣 Work	Order Queu	e Searc	h				۹ 🖩 🚺
A		0 *	Ē	16 🧯 📫	0	: Open Work Orders	Ø 1
Unas Work Orders (국 In progress	ssigned Emerg What are the	ency 🛛	Unassigned V signments?	Vork Ord 🖸	On Hold Work Orders	E 6 5	New Approved OIn progress
Work Order	Date Entered	Status	Requesting Department	Activity	Description		
5595	10/5/2018	New	City Garage	SHOCK	SHOCK		
6193	10/5/2018	Approved	Building Department	Paint	XOX	10	
5547	10/1/2018	New	City Garage	SHOCK	SHOCK		
6164	10/1/2018	Approved	Maintenance	General AC Maintenance	Service Request		
5997	9/28/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac	Work Order Locations	1
5986	9/26/2018	In progress	Parks and Recreation	Soccer Net Replac	Soccer Net Replac	Find address or place Q	and the second
5971	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac	9 - Blog	
5970	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		*
5969	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac		٩
5968	9/26/2018	Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac	incester St 8	
15946	9/26/2018	Approved	Public Works	Mowing the grass	Vegetation		· +
					_		

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

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

= 🤣 wa	ork Order Queue Sear	л			
					٩
	0	Ö	16 1	0	Open Work Orders
Un	assigned Emergency	Unassigned V	Nork Ord	On Hold Work Orders	
Work Orde	ers: What are the current as	signments?		:	s 5 enew Approved e
Work Order	Date Entered Status	Requesting Department	Activity	Description	21
5695	10/5/2018 New	City Garage	SHOCK	SHOCK	
6193	10/5/2018 Approved	Building Department	Paint	xxx	10
5547	10/1/2018 New	City Garage	SHOCK	SHOCK	
6164	10/1/2018 Approved	Maintenance	General AC Maintenance	Service Request	
					Work Order Leantions
5997	9/28/2018 Approved	Parks and Recreation	Soccer Net Replac	Soccer Net Replac	Work Order Locations
5997 5986	9/28/2018 Approved 9/26/2018 In progress	Parks and Recreation Parks and Recreation	Soccer Net Replac	Soccer Net Replac Soccer Net Replac	Find address or place Q
5997 5986 5971	9/28/2018 Approved 9/26/2018 In progress 9/26/2018 Approved	Parks and Recreation Parks and Recreation Parks and Recreation	Soccer Net Replac Soccer Net Replac Soccer Net Replac	Soccer Net Replac Soccer Net Replac Soccer Net Replac	Prot address or place Q
5997 5986 5971 5970	9/28/2018 Approved 9/26/2018 In progress 9/26/2018 Approved 9/26/2018 Approved 9/26/2018 Approved	Parks and Recreation Parks and Recreation Parks and Recreation Parks and Recreation	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	With Orber Excellations
5997 5986 5971 5970 5969	9/28/2018 Approved 9/26/2018 In progress 9/26/2018 Approved 9/26/2018 Approved 9/26/2018 Approved 9/26/2018 Approved	Parks and Recreation	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	
5997 5986 5971 5970 5969 5968	928/2018 Approved 926/2018 In progress 926/2018 Approved 926/2018 Approved 926/2018 Approved 926/2018 Approved 926/2018 Approved 926/2018 Approved 926/2018 Approved	Parks and Recreation	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac Soccer Net Replac	



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.

View Data										Search		٩
Payment Tren	nds: What \	/endors have	been paid?							FI	lter 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	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									H	< 1 2	3 4 5	> >
												CLOSE

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

/iew Data										Search		٩
Payment Trend	ds: What V	endors have b	been paid?							Filter Data	a 🛃 Outpu	ıt Data
Invoice Number	Status	Invoice Status	Description	Invoice Total	Discount Amount	Net Amount	Invoice Date	Invoice Date Year	Discount D	ate Due Date	Check Date	Use
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	с
999	E	Pending Ext		\$40.00	\$0.00	\$44.00	6/12/2018	2018	1/1/0001	6/12/2018	1/1/0001	с



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									efi			٩
Payment Tr	Payment Trends: What Vendors have been paid? 🔹 Output Data											
Invoice Number Status Invoice Status Description Invoice Total Discount Amount Net Amount Invoice Date						Invoice Date	Invoice Date Year	Discount Date	Due Date	Check Date	Use	
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	Р	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 >	►I
											CI	LOSE

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.

Output Data		
Title	Payment Trends: What Ven	dors have been paid?
File Type		
PDF	O Excel	⊖ csv
Pivot Table		•
Include		
Data Only	O Data & Image	O Image Only
Number of Records		All
		0
Columns		
		CLOSE OUTPUT

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:
	 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	Specifies how many records to include, such as all records or the
Records	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

	А	В	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

A	В	C		D	E						
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			¢122.00							
6 124	Pending External	A	B C	D E	F	G	н	- I	Discottable Fields		
7	Pending RFC	1 Sum of Invoice Total							Pivot lable Fields		Y X
8	Pending RFC	2 Row Labels	Total						Choose fields to add to report:		
9	Pending RFC	3 Approved	43082.99								
10	Pending RFC	4 On Hold	16734						Search		٩
11	Pending RFC	5 Paid	30834.7						Disustan Number		
12	Pending RFC	6 Pending Approval	2100								
13	Pending RFC	7 Pending Discrepancy	88						✓ Invoice Status		
14 123	Pending External	8 Pending External	251568.5						Description		
15 123 ABC	Pending External	9 Pending RFC	150220						✓ Invoice Total		
16 14489	Approved	10 Rejected	900						More Tables		
17 20489	Approved	11 Suspended Invoice	8								
18 24489	Approved	12 Three Way Match Pene	1 15						Drag fields between areas below:		
19 12346741	Paid	13 Voided Invoice	775.73						T Eilter	Columns	
20 12346742	Paid	14 Grand Total	496326.92						1 Titters	Columns	
21 123467431212	Rejected	15									
22 12346744555	Pending Discrepancy	16									
Data Pivot	Table (+)	17									_
									Rows	Σ Values	
		19							Invoice Status	Sum of Invoice Total	*
		20								1	
		21									
		22									
		→ Data Pivot	Table 🕀		1				Defer Layout Update		Update
		Ready							III (II)	·	+ 100%



Sample CSV Export

	А	В	С	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.

=	S Invoice Pro	cessing	Search								۹	e e
† ≡ ★	Filter By Year	Invoice Date Year 3 items selecti	ed .	₹ FILTER	> :	Total Invoices	180	5	≂ :	Batch Review = 2007 2008 2009 Munis Batch Clerk	Vendor Name	: Net Amount
∷ ∕ ¢	Open Batches	ξ	\$1,00	[₹]	:	A Invoice 3-Way Match	0		₹ :	31 Munis 34 Munis 35 Munis	DEF SUPPLY COMPA DEF SUPPLY COMPA DEF SUPPLY COMPA	\$96.89 \$95.00 \$190.00
	Active Invoices	How is pro Munis Due Date	oductivity?	Status	Vendor Na	ame	Discount Amt.	Net Amt.	수 : Invoice Total	50 Munis 51 Munis 52 Munis	FORD MOTOR CREDL FORD MOTOR COMP FORD MOTOR COMP	\$35,000.00 \$45,000.00 \$90,000.00
	2/6/2007 2/14/2007	2/16/2007 2/24/2007	5539 372	Approved Paid	DEF SUPF	PLY COMPANY PLY COMPANY	\$5.10 \$5.00	\$96.89 \$95.00	\$101.99 \$100.00	89 total	K K 1 23	4 5 ≻ ≻I
	2/14/2007 4/19/2007	2/24/2007	373 457	Approved Paid	DEF SUPP	PLY COMPANY PLY COMPANY	\$10.00	\$190.00	\$200.00 \$333.00	Invoice Analysis		÷
	10/31/2007	11/13/2007	5624 790789	Approved Paid	ABC SUP	PLY COMPANY PLY COMPANY	\$11.25	\$213.75 \$480.00	\$225.00	43	Paid Invoices	Open Invoices
>	5/7/2008	6/6/2008	5742 12345-8951	Approved Approved	MUNIS, IN BMI SYST	NC. TEMS GROUP	\$0.00 \$0.00	\$20.00 \$500.00	\$20.00 \$500.00	128		



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 pro	oductivity	?				\$
2007 2008 20	009 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
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		man allowed a		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

## 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.



## Card Info

The Card Info option displays the Card Information dialog box, providing details about the card and its connected data set. This feature is informational only and can supply useful information when you are contacting technical support personnel.

Card Information	
Card Name: Top Ten Work Order Types Card Description: This Bar chart graphically represents the top 10 work order types grouped on work.	order types.
Card Dataset: UB Work Orders v3	
Dataset Description: UB Work Orders	
Content Version: 2.0.0	
Data Last Retrieved: July 5th 2019, 9: 09: 47 am	
	CLOSE

## Personalize

The Personalize option provides a dialog box where you can set the width, height, color, and refresh rate of the card in five-minute increments.

Personalize: 'Payment Trends'									
Size:	Width: 7	Height: 6							
Color:		•							
Auto Ref	resh Interv	val							
minutes	, ⁰ O—		60	0					
RESE	г		CANCEL	UPDATE					

After you make your selections and click Update, the page instantly applies the changes, shifting the page layout as necessary based on any new card dimensions.

To remove all applied personalizations, click Reset in the Personalize dialog box to restore the card's default layout.



## 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.

	Open WO Breakdown		- <del></del>	Options
				Q View Data
	ErrorMessage:Error Retrieving I		Output Data	
			C Refresh	
			🖍 Card Designer	
			📃 Clear Filter	
Update this Card?				Delete Card
	A newer version of this Card is available		Card Info	
Upo	lating this card may remove existing card cor Would you like to update now?	nections.		Personalize
		+	C Update Card	
	Don't ask again about updating this		Visualizations	
	CLOSE	UPDATE		

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 <u>Appendix B—Visualizations</u> 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**



## 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 Ca	alendar: What	is coming up?					* * *
Jul 8 – 1	14, 2018		Day Wee	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		l	Delinquent Notices	]			
8am							
0.5.55							
9am							
			Del	inguent Notices			
10am							
			Ever	nt Start: 7/10/2018			
			Ever	nt End: 7/10/2018			
11am			Ever	nt Assignee: munis			
				ок			
12pm							
трт							
2pm							

## Count

Card Type: Statistic

The Count card displays a total amount or number.





#### 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	$\checkmark$			
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	Schedu	iled Date	Inspecto	r Nam	e				Acti	on	
151	BLDG	Rough Plumbing	ME		1/1/0001	Ingrid In:	specto	r	Ŧ			SUBN	/IT	
393	PBWKS	Soil Test	MD		4/18/2017	Ingrid In:	specto	r	Ŧ			SUBN	ЛТ	
1715	PBWKS	Measured Setbacks	MD		12/9/2002	John L V	Vhite		•			SUBN	AIT.	
1741	PLANG	Final Inspection	NH		3/21/2003	John L V	Vhite		Ŧ			SUBN	ЛТ	
1767	PLANG	Reinspection	MD		3/12/2003				•			SUBN	ЛТ	
3,206 total						I	<	1	2	3	4	5	>	►I



#### Detail

Card Type: Detail

The Detail card displays additional information about a record.



## **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.





## **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.

Favorites	:
▲ Financials	L
Define/Start Budget Projection	L
General Ledger Settings	
Recent Activity	
Budget Scenarios	L
Budget Transfers and Amendments (2)	L
Central Budget Entry	L
Change General Ledger Account Codes	L
General Journal Entry/Proof (2)	
Project Central	

## 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.

I want to focus on		< :
Fund Description	Ŧ	

## 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.

Tyler Menu	9 8 8
Search	Ç
<ul> <li>Munis</li> </ul>	
Financials	
Human Capital Management	
General Revenues	
Property Revenues	
Asset Maintenance	
Other Applications	
Departmental Functions	
System Administration	
▷ Help	

# 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.

Frequent	Actions
Who are m	y pending applicants? arn more cetails about current applicants.
How are we	Pending Applicants         Image: Constraint of the
I want to co	Req # A Suffix A Description Job Family Applicant SSN A Leal Name First Name Middle Name Mi Suffix # B Applicant Attachment
Actions His	MAIN     RECOMMENDATION     PROCESS EVENT HISTORY       Status*     *       Applicant Status     *       Comment     *       Regetion Reson     *
	Rejection Notes Traphagens Number 4 Application Date 1 Tigalility Date Score Kank Recruitment Ranking • 6
	Applicant Scoring Score Rank
	<ul> <li>( ) 2 3</li> </ul>

