

Tyler HUB - Tips & Tricks

Munis – All

TABLE OF CONTENTS

<i>Introduction</i>	2
<i>Personalization</i>	2
Favorites	2
Card Personalization	7
Card Designer for Existing Card	9
Card Designer for a New Visualization	13
Editing Home Page	19
<i>Global Settings</i>	20
Site Customization	20
Settings, Banners, and Logos	21
Announcements	23
Export/Import	24
User Administration	30
User Templates	34
<i>Data Analysis</i>	38
Filters	38
Connecting Cards	39
Exporting Datasets	48
<i>Other Tyler Applications</i>	52
<i>What's Next</i>	53

INTRODUCTION

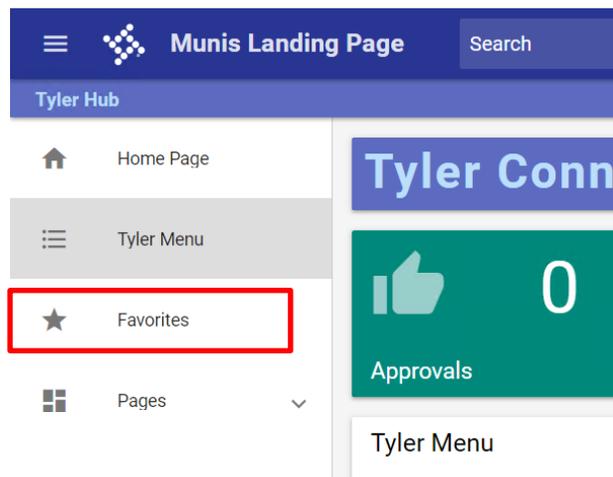
You've been using Tyler Hub for a little while, but you know there is more capability to the content, cards, and pages than you are using. This session will review some helpful hints, tips, and tricks for current Tyler Hub users to become more proficient. Make Tyler Hub work harder for you than Munis Dashboard did in the past. During this session, we will review customizations, the Card Designer, user administration, and data analysis. At the conclusion of this session, you will learn features of Tyler Hub which will save time, display data, and be more aesthetically vivid allowing you to effectively manage your tasks.

PERSONALIZATION

One size fits most will allow a user to get in and do their work, but personalization will allow for a more valuable experience. Tyler Hub is highly customizable and there are a few options that are easy to do, that can make a large difference in your productivity.

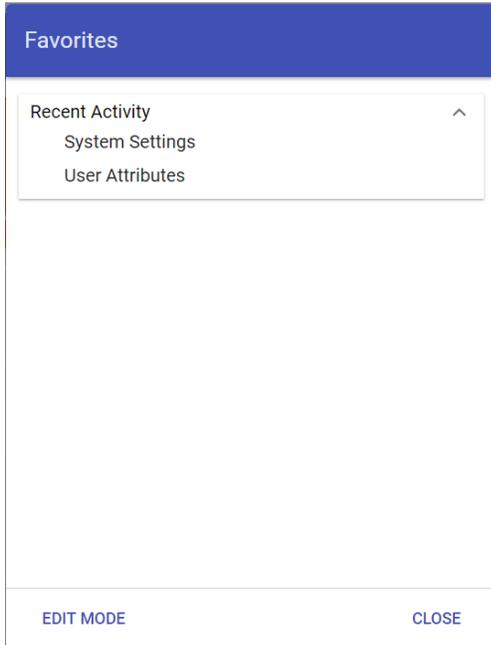
Favorites

Favorites are denoted by the star on the Tyler Hub menu. Within Favorites, Tyler programs, weblinks, and reports can be set as destinations.



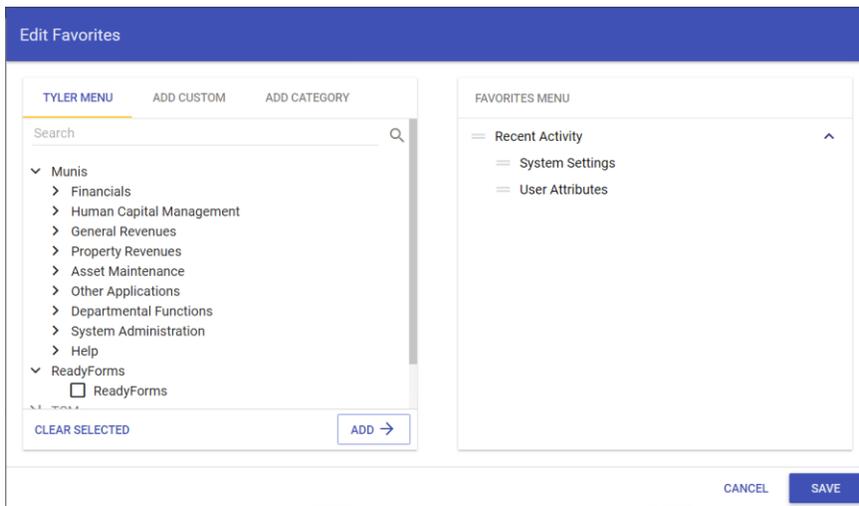
Tyler Hub menu from the Munis Landing Page

Once Favorites open, the recent activity will appear, listing the last programs which have been visited from the Tyler Menu. Click Edit Mode, to start customizing your favorites.



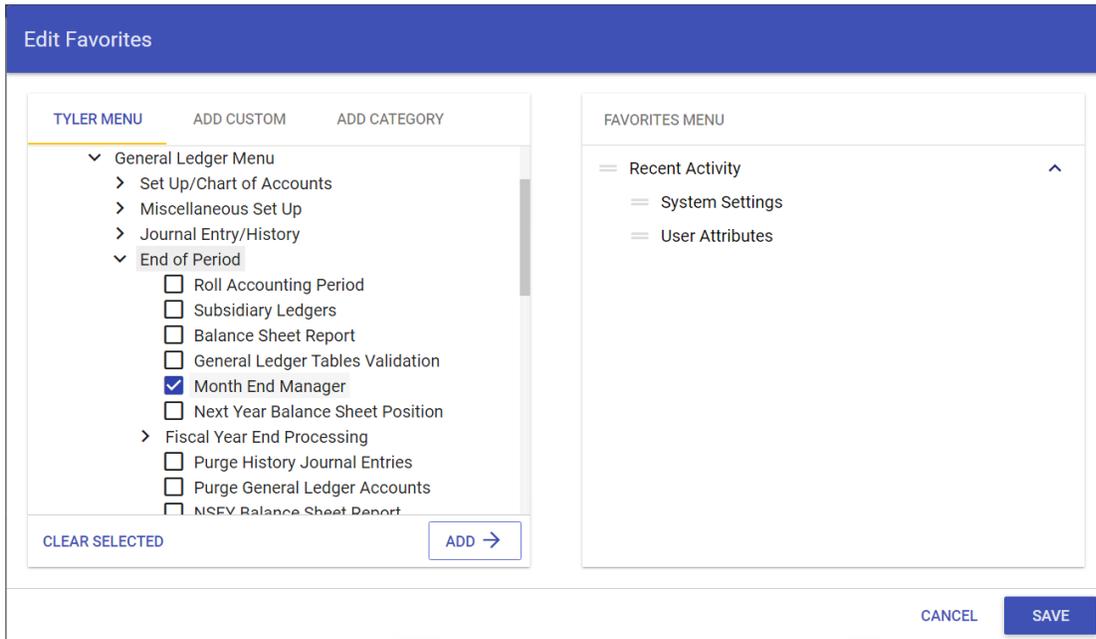
Favorites Menu

The Edit Favorites screen will allow for Tyler Menu options, Custom URLs, and Categories to be added to your favorites.



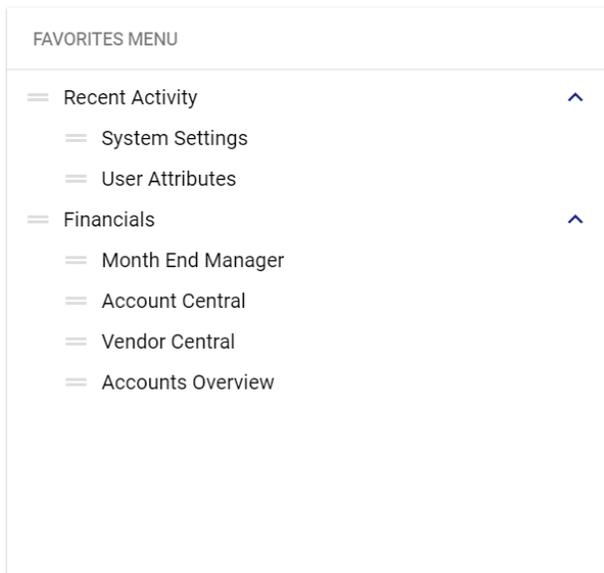
Edit Favorites Screen

To add a program, navigate through the Tyler Menu and select the check box near the programs that you want added.



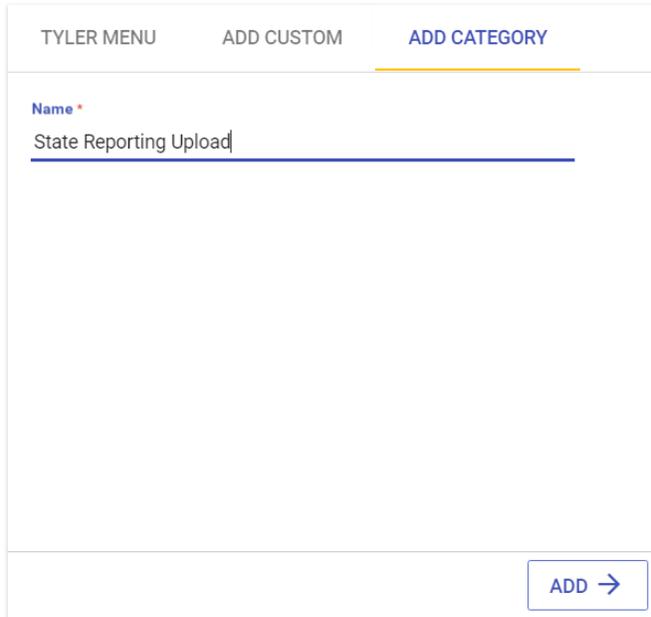
Adding Favorites from Tyler Menu

Clicking Add will move all items to the Favorites Menu under the Module level listing of the program. This means Month End Manager will roll up under Financials.



Favorites Menu with Added Items

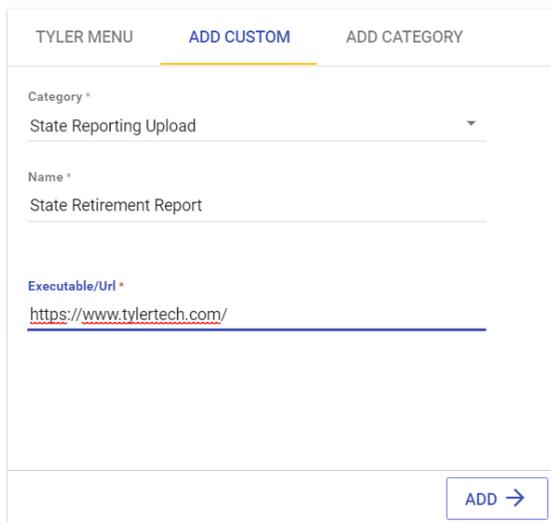
Adding Categories can be used to add new sections which programs will be listed under. Once the Category is named, it will be available to place programs under in the list.



The screenshot shows a web interface with three tabs: 'TYLER MENU', 'ADD CUSTOM', and 'ADD CATEGORY'. The 'ADD CATEGORY' tab is selected and underlined. Below the tabs is a form with a 'Name *' label and a text input field containing 'State Reporting Upload'. At the bottom right of the form is a blue button labeled 'ADD →'.

Adding a Category in Edit Favorites

Once the Category is added, a custom favorite can be added. Any URL or executable can be used for a favorite. These are great for common websites that are accessed in conjunction with your Tyler work. State reporting agency uploads are common outside links.



The screenshot shows a web interface with three tabs: 'TYLER MENU', 'ADD CUSTOM', and 'ADD CATEGORY'. The 'ADD CUSTOM' tab is selected and underlined. Below the tabs is a form with three fields: 'Category *' with a dropdown menu showing 'State Reporting Upload', 'Name *' with a text input field containing 'State Retirement Report', and 'Executable/Url *' with a text input field containing 'https://www.tylertech.com/'. At the bottom right of the form is a blue button labeled 'ADD →'.

Adding Custom URL Favorites

Once added, the Favorites menu can be launched, and all added favorites will be listed.

Favorites

- Recent Activity ^
 - System Settings
 - User Attributes
- Financials ^
 - Vendor Central
 - Month End Manager
 - Account Central
 - Accounts Overview
- State Reporting Upload ^
 - State Retirement Report

EDIT MODE CLOSE

Newly Tailored Favorites Menu

Favorites can also be added directly from the Tyler Menu. To accomplish this, right-click the program item and choose “Add Favorite” to send the favorite under the Module level of the menu. Requisitions would roll up under Financials as a category. This can be edited in Edit Favorites.

Tyler Menu

Search

- ▼ Munis
 - ▼ Financials
 - ▶ General Ledger Menu
 - ▶ Budget Processing
 - ▼ Purchasing
 - ▶ Setup
 - ▼ Purchase Order Processing
 - Item Marketplace
 - Run this Link
 - ★ Add Favorite
 - Requisition Import
 - Requisition Export
 - Purchase Order Entry
 - Purchase Order Approvals
 - Print Purchase Orders

REFRESH CLOSE

Favorites

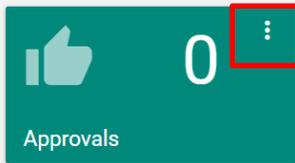
- Recent Activity ^
 - System Settings
 - User Attributes
- Financials ^
 - Vendor Central
 - Month End Manager
 - Account Central
 - Accounts Overview
 - Requisitions
- State Reporting Upload ^
 - State Retirement Report

EDIT MODE CLOSE

Adding Favorite from Tyler Menu and New Added Menu Favorite

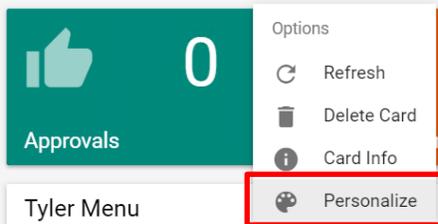
Card Personalization

Card Personalization will allow views of content to personalize their content without utilizing the Card Designer. This will allow for light modification including layout and color choices. This will not allow the user to change the underlying functionality of the Card. To access the Personalization, select the three dots to open the Card Options.



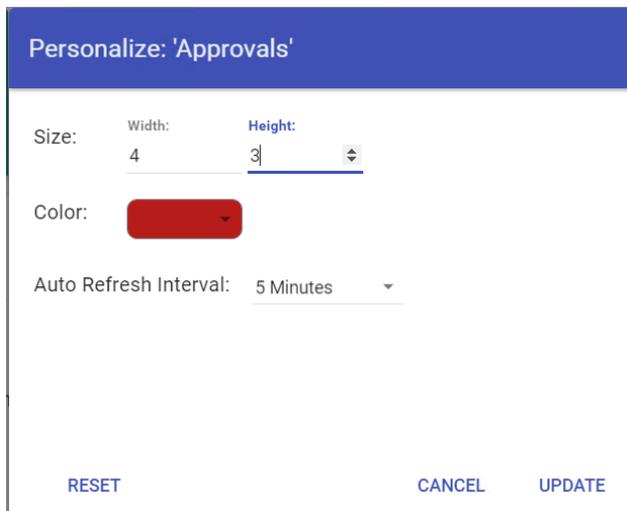
Approvals Card with Options Menu in Top Right

Once the Options Menu is available, select Personalize.

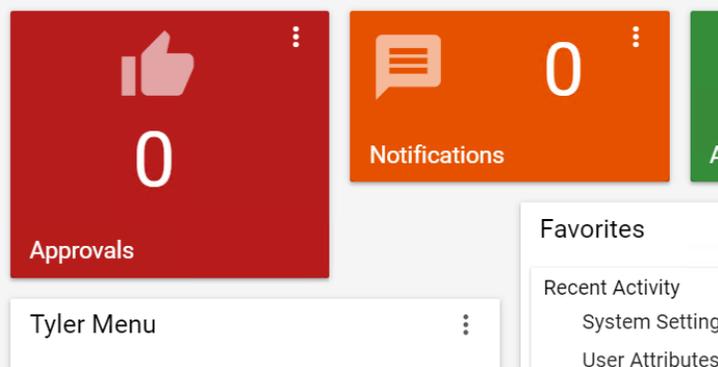


Approvals Tile with Open Menu Open

In the Personalize screen, visual attributes and the Auto Refresh Interval can be set. Clicking Update will push the changes to Tyler Hub.

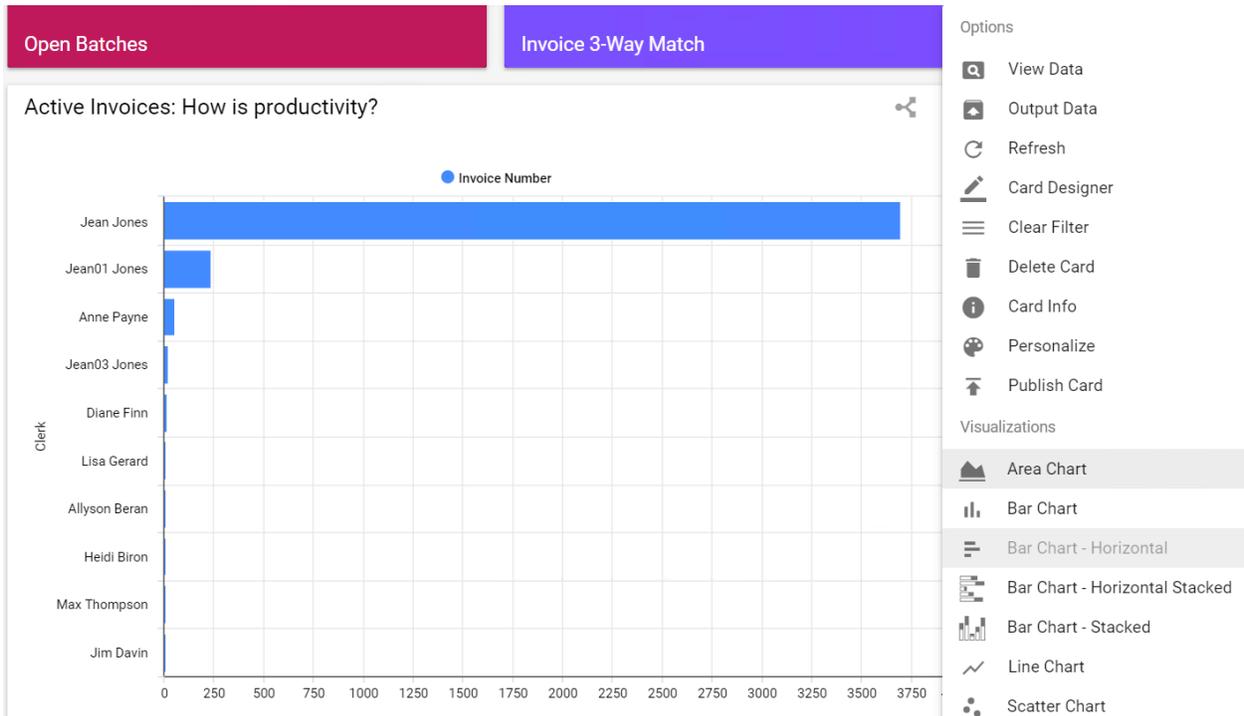


Personalize: Approvals Screen



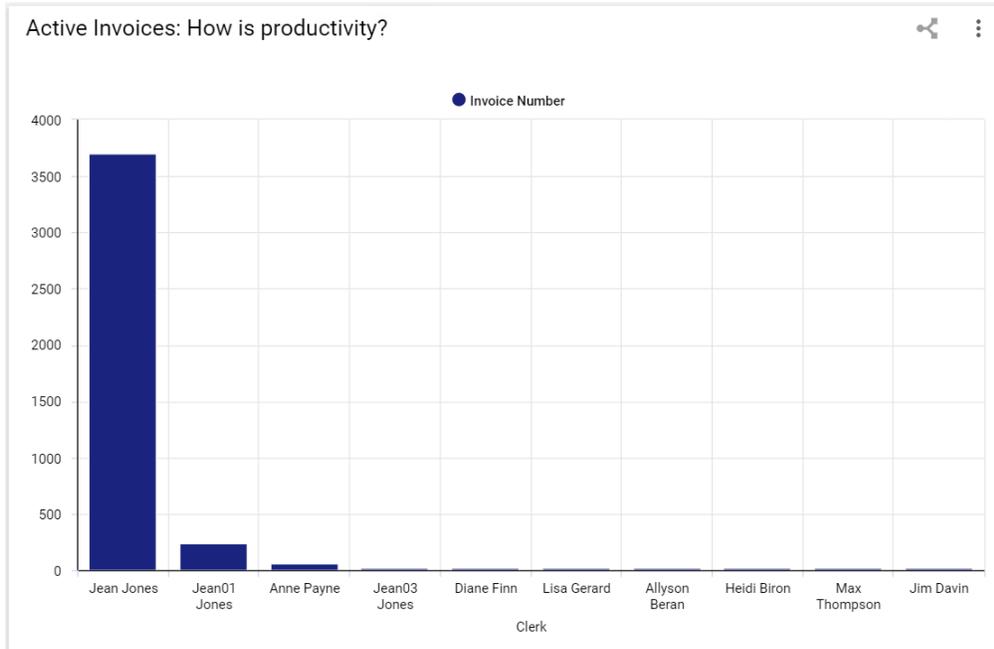
Approvals Card with Personalization

Other cards allow for more personalization. For charts, under the menu option, different visualizations can be selected. Without entering the Personalize screen, you can select a different chart type.



The Card Options Menu

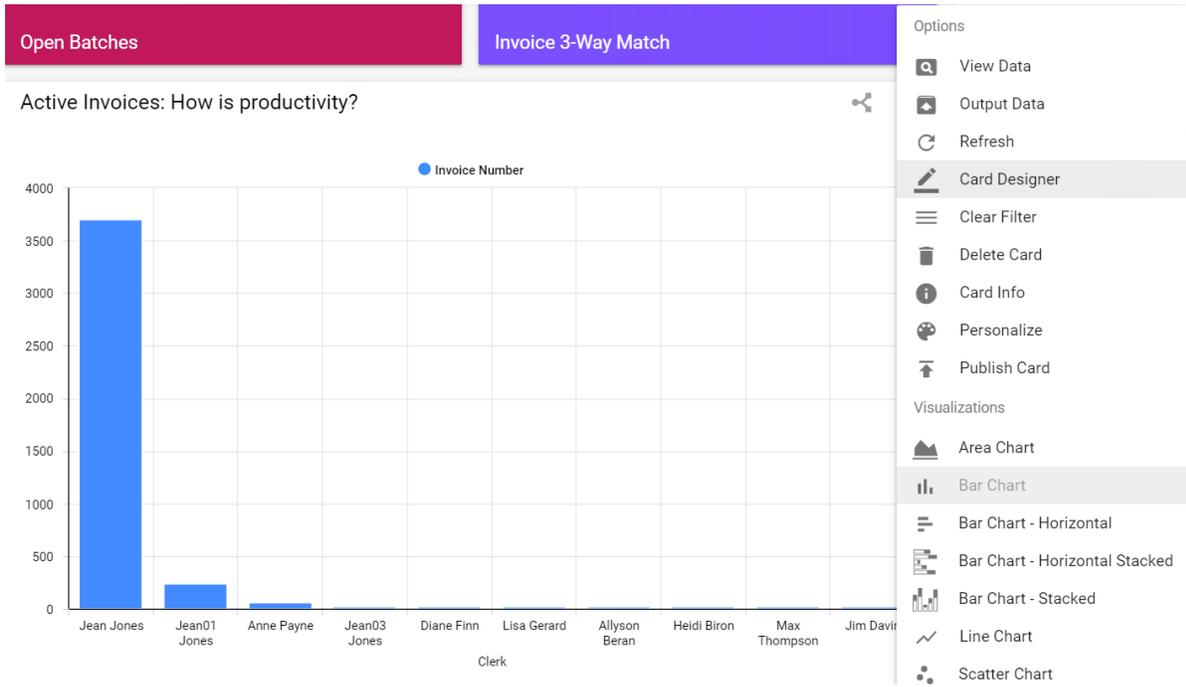
This Card has been switched from a horizontal chart to a vertical chart.



Updated Active Invoices Card with new Visualization selection

Card Designer for Existing Card

The Card Designer can be used to create new cards and it can be created to modify existing cards. Starting from a card which is already created is an easy way to test out this customization. Starting from an existing Card, select the card designer from the Options Menu.



Selecting the Card Designer from the Card Options Menu

Once in the Card Designer navigate to the field, filter, or options you would like to change. In this Card, data labels can be added to the bars on the chart. This can be found under the Select Data Fields tab.

Card Designer

Select Data Fields

Fields

Grouping

Select Grouping: Clerk

Fields

Select Field: Invoice Nu... | Aggregation: Count

Visualization Options

Grouped | Stacked

Show Legend

Legend Position: top

Card Preview

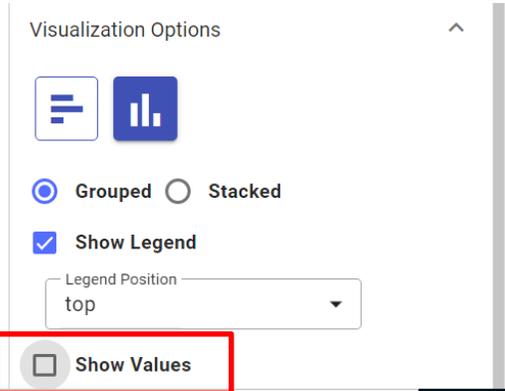
Active Invoices: How is productivity?

Data Preview

Invoice ...	Status	Invoice St...	Description	Invoice To...	Discount ...	Net Amou...	Invoice D...	Invoice D...	Discount ...	Due
1018	P	Paid	Paper	\$50.00	\$0.00	\$50.00	6/23/20...	2008		6/23/2
1025	P	Paid	Office S...	\$45,000...	\$2,250.00	\$42,750...	7/22/20...	2007	7/3/2008	7/3/2
1030	P	Paid	Office S...	\$13,400	\$674.50	\$12,815	7/22/20	2007	7/3/2008	7/3/2

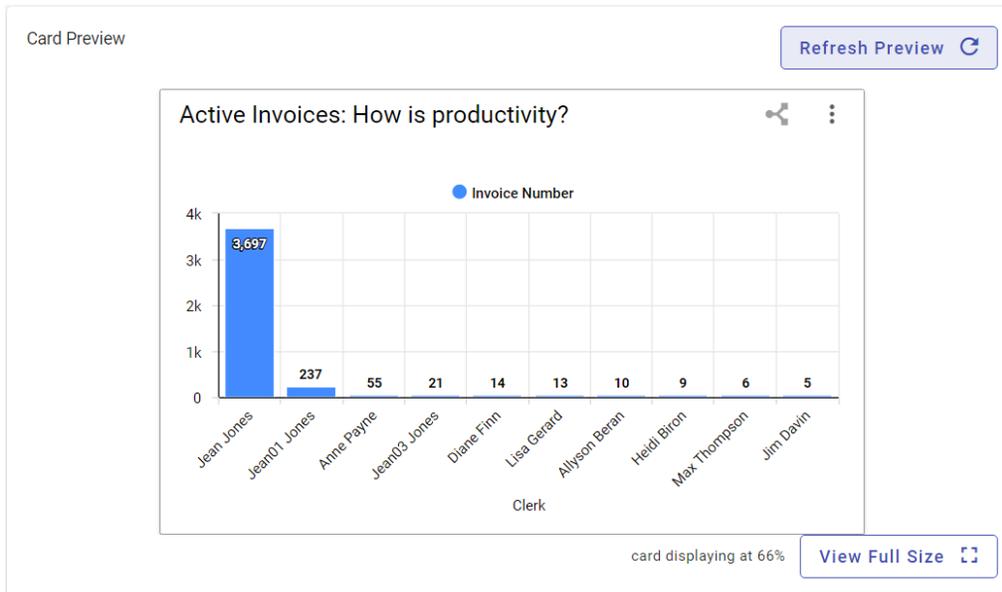
Card Designer

At the bottom of the Visualization Options the “Show Values” checkbox can be selected.



Visualization Options within the Card Designer

As changes are made, the visualization can be previewed in Card Designer. This allows you to tailor your choices before saving the changes.



Card Preview After Options Were Changed

This is also a good opportunity to change any data ordering that is more helpful. Selecting Level 2 on the Drilldown Levels will allow you to check the columns in the visualization when selecting a data element from Tyler Hub.

The screenshot shows the 'Card Designer' interface. On the left, the 'Select Data Fields' panel lists various fields like Invoice Date, Due Date, Status, Invoice Number, Vendor Name, Discount Amount, Net Amount, Invoice Total, and View URL. The 'Card Preview' window shows a table titled 'Active Invoices: How is productivity?' with columns for Invoice D..., Due Date, Status, Invoice, Vendor N..., Discount..., and Net Amt. Below the preview is a 'Data Preview' section showing a detailed table of invoice data.

Invoice #	Status	Invoice St...	Description	Invoice To...	Discount ...	Net Amou...	Invoice D...	Invoice D...	Discount ...	Due
1018	P	Paid	Paper		\$50.00	\$0.00	\$50.00	6/23/20...	2008	6/23/2...
1025	P	Paid	Office S...	\$45,000...	\$2,250.00	\$42,750...	7/22/20...	2007	7/3/2008	7/3/2...
1030	P	Paid	Office S...	\$13,490	\$674.50	\$12,815	7/22/20...	2007	7/3/2008	7/3/2...

Card Designer Select Data Fields

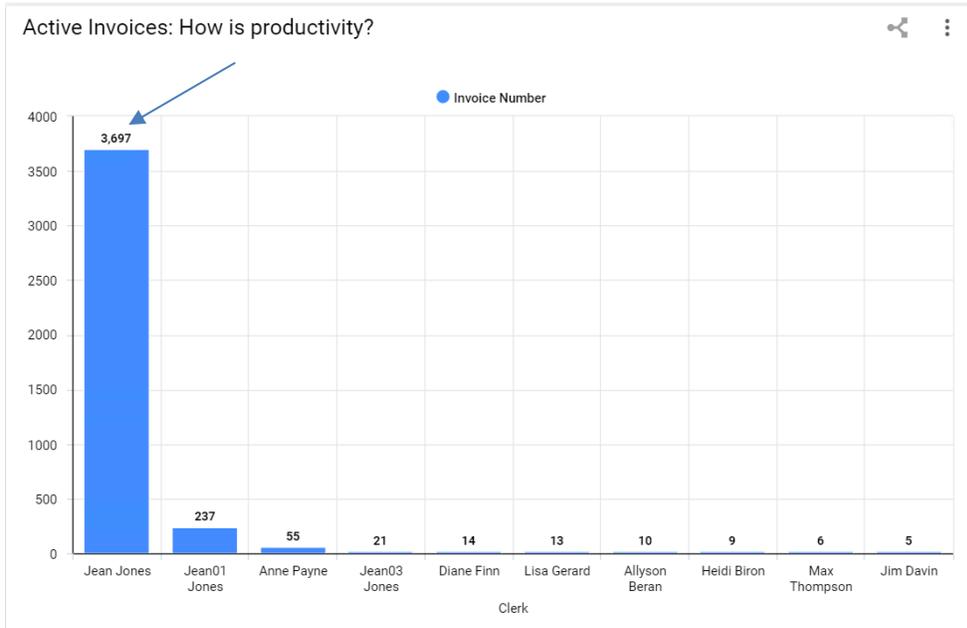
The Fields can be dragged into the desired order. This will impact the order of the columns from left to right.

Fields

- == Select Field Vendor Name
- == Select Field Invoice Number
- == Select Field Invoice Date
- == Select Field Due Date
- == Select Field Invoice Status
- == Select Field Discount Amount

Reordering Fields in Select Data Fields

After returning to the Hub Page, the visualization can be seen with the data labels. Clicking on Jean Jones’s data on the chart will bring you into the level 2 of the card.



Tyler Hub Card After Adjustments have been saved

A table will display with the data filtered based on Jean’s entry. This will show the new column order that was sorted in the Card Designer.

Active Invoices: How is productivity?

☰ Jean Jones

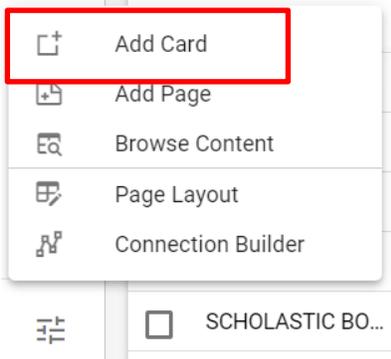
<input type="checkbox"/>	Vendor Name	Invoice	Invoice Date	Due Date	Status	Discount Amt.	Net Amt.	Invoice Total
<input type="checkbox"/>	DEF SUPPLY COMPANY	1442	07/14/2007	07/14/2007	Paid	\$0.00	\$23,499.00	\$23,499.00
<input type="checkbox"/>	DEF SUPPLY COMPANY	1871	06/01/2009	07/01/2009	Paid	\$0.00	\$31,501.00	\$31,501.00
<input type="checkbox"/>	APPLE COMPUTERS	1831	06/30/2009	07/30/2009	Paid	\$0.00	\$22,000.00	\$22,000.00
<input type="checkbox"/>	APPLE COMPUTERS	1862	06/01/2009	07/01/2009	Paid	\$0.00	\$22,000.00	\$22,000.00
<input type="checkbox"/>	APPLE COMPUTERS	3937	06/01/2014	07/01/2014	Paid	\$0.00	\$75,477.98	\$75,477.98
<input type="checkbox"/>	APPLE COMPUTERS	3948	06/24/2014	07/24/2014	Paid	\$0.00	\$11,234.89	\$11,234.89
<input type="checkbox"/>	CHEVROLET	1445	07/14/2007	07/14/2007	Paid	\$0.00	\$200,000.00	\$200,000.00
<input type="checkbox"/>	STAPLES	1877	06/01/2009	07/01/2009	Paid	\$0.00	\$550.00	\$550.00
<input type="checkbox"/>	SCHOLASTIC BOOK	1446	07/14/2007	07/14/2007	Paid	\$0.00	\$950,000.00	\$950,000.00
<input type="checkbox"/>	WORLD TRAVEL AGENCY	3939	06/01/2014	07/01/2014	Paid	\$0.00	\$534.45	\$534.45

Rows per page: 10 1-10 of 3697

Hub Card’s Level 2 Drilldown

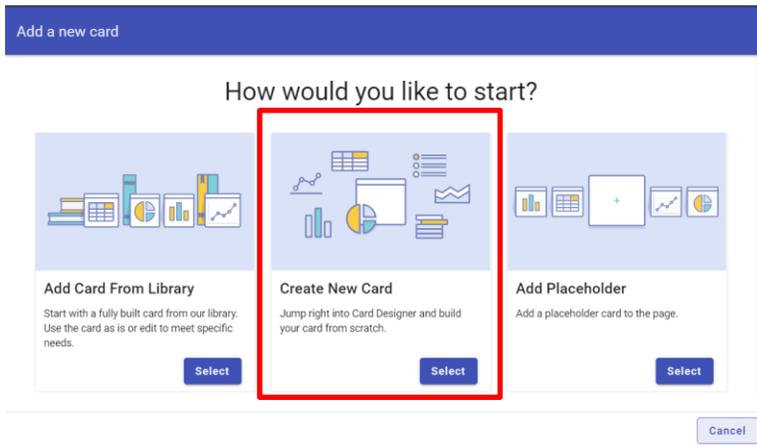
Card Designer for a New Visualization

The Card Designer can also be used to create visualizations from scratch and imbed them within the current Hub Page. From the Edit Content Menu, select Add Card.



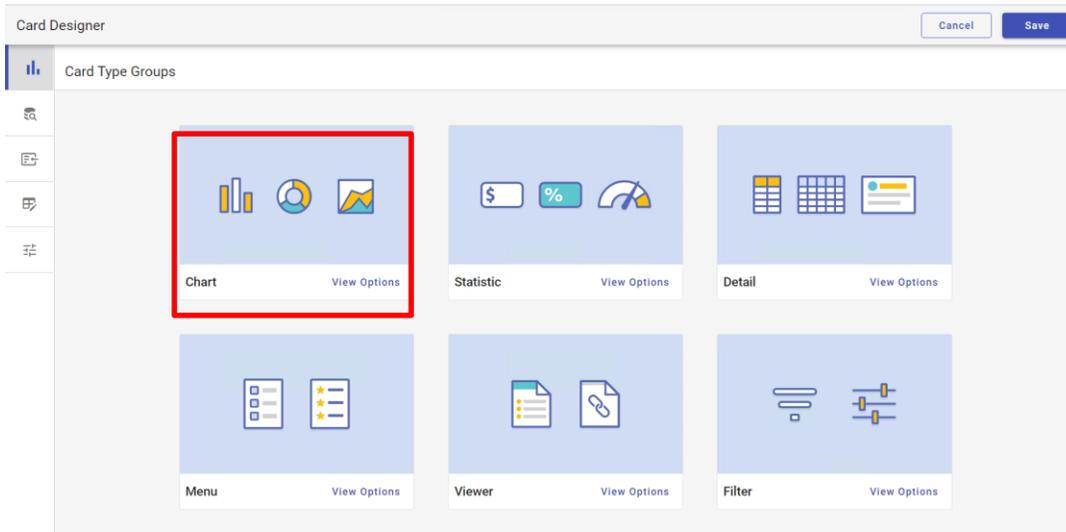
Adding a Card from the Edit Content Option

When adding a new card, the first choice is what starting point makes sense for the objective. When creating a wholly new Card, choose the Create New Card option.



Add a New Card Wizard

After selecting the starting point, the Card Type Groups become available. These will be collections of types of visualizations available for Cards. Selecting Chart will give all available chart options.



Card Type Group Selection Page

Once viewing the chart types, a chart fitting the need of the visualization can be selected. Bar charts are great for comparing multiple records and line charts are helpful when showing trends over time. Selecting Bar chart will allow the selection of data.

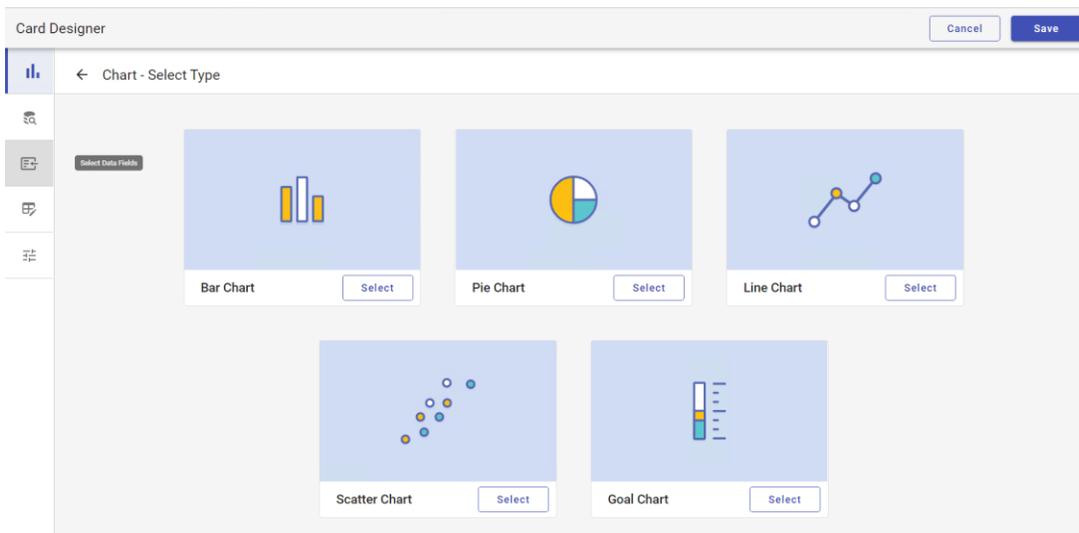


Chart Type Selection Page

With the chart type selected, the dataset can be selected. Tyler Hub has a curated data warehouse that can be tapped into when looking to surface information to Tyler Hub. Select the Dataset of Top Vendors to bring that data into the Card Designer.

Selected Dataset in Card Designer

Once the Dataset is in Card Designer, the individual attributes of the dataset can be used to plot the chart. In the chart, the Calendar Year and Fiscal Year Vendor amounts are to be compared. Group the Vendors by grouping by Vendor Name, then select the quantitative fields of Calendar Year Payout Total and Fiscal Year Payout Total. The Aggregation should be sum since the total paid out is desired. The Card Preview is showing a vendor that is throwing off the visualization a bit. That can be addressed in the Refine Selected Data screen.

Vendor Id	Amount	Row Num...	Date Group	Vendor N...	Status	Entry Date	Vendor R...	Vendor N...	Is Active	30 Day
1	\$87.00	7	30	1000	A	7/16/20...	1	SUPPLY	True	\$87
1	\$87.00	8	60	1000	A	7/16/20...	1	SUPPLY	True	\$87
1	\$87.00	8	90	1000	A	7/16/20...	1	SUPPLY	True	\$87

Select Data Fields in Card Designer

In Refine Selected Data, the Vendor Miliken can be filtered out. This vendor is the contractor on a large CIP project and is distorting the view the visualization. This vendor can be filtered out. To limit the find set, the Limit Results can be set to 10.

Refine Selected Data

Select Field: Vendor Name
Constraint: z Filter Value: MILIKEN
Add Filter

Order By: Calendar year payout total
Ascending Descending
Add Order

Limit Results: Limit Value: 10

Blank Card

Vendor Name	Calendar year payout total	Fiscal year payout total
NORTHERN EDU...	~\$150k	~\$150k
PRG CONSTRUCTION	~\$100k	~\$100k
PRUDENTIAL INSURANCE	~\$50k	~\$50k
TYLER TECHNOLOGIES	~\$50k	~\$50k
OFFICE MAX	~\$50k	~\$50k
KOHL'S DEPT STORE	~\$50k	~\$50k
FORD MOTOR COMPANY	~\$50k	~\$50k
ARC SUPPLY COMPANY	~\$50k	~\$50k
ABLE CONCRETE	~\$50k	~\$50k
REFRIGERANT SUPPLY INC	~\$50k	~\$50k

Vendor Id	Amount	Row Num...	Date Group	Vendor N...	Status	Entry Date	Vendor R...	Vendor N...	Is Active	30 Day
1	\$87.00	7	30	1000	A	7/16/20...	1	SUPPLY	True	\$87...
1	\$87.00	8	60	1000	A	7/16/20...	1	SUPPLY	True	\$87...
1	\$87.00	8	90	1000	A	7/16/20...	1	SUPPLY	True	\$87...

Refine Select Data Page in Card Designer

Anytime an exception is made, like the one to filter the vendor, it is important to share that information with future users of the Card. This can be shared in the Change Card Options portion of the Card Designer. This is also where a meaningful title can be added to the Card.

Change Card Options

Vendor Fiscal vs. Calendar Totals

Card Description: This Card shows our highest paid vendors aside from Miliken who is a contractor working on a large CIP project.

Card Sub Title

Card Footer Text

Auto Refresh Rate: Select Interval: None

Background Color: [Color palette]

Links: Add Link

Vendor Fiscal vs. Calendar Totals

Vendor Name	Calendar year payout total	Fiscal year payout total
NORTHERN EDU...	~\$150k	~\$150k
PRG CONSTRUCTION	~\$100k	~\$100k
PRUDENTIAL INSURANCE	~\$50k	~\$50k
TYLER TECHNOLOGIES	~\$50k	~\$50k
OFFICE MAX	~\$50k	~\$50k
KOHL'S DEPT STORE	~\$50k	~\$50k
FORD MOTOR COMPANY	~\$50k	~\$50k
ARC SUPPLY COMPANY	~\$50k	~\$50k
ABLE CONCRETE	~\$50k	~\$50k
REFRIGERANT SUPPLY INC	~\$50k	~\$50k

Vendor Id	Amount	Row Num...	Date Group	Vendor N...	Status	Entry Date	Vendor R...	Vendor N...	Is Active	30 Day
1	\$87.00	7	30	1000	A	7/16/20...	1	SUPPLY	True	\$87...
1	\$87.00	8	60	1000	A	7/16/20...	1	SUPPLY	True	\$87...
1	\$87.00	8	90	1000	A	7/16/20...	1	SUPPLY	True	\$87...

Card Options Page in Card Designer

Once customization is complete, the Save button on the top right can be selected to move the card to Hub Page.

Invoice Processing Search

Tyler Hub

Vendor	Invoice #	Invoice Date	Due Date	Status	Discount Amt.	Net Amt.	Invoice Total
STAPLES	1877	06/01/2009	07/01/2009	Paid	\$0.00	\$550.00	\$550.00
SCHOLASTIC BO...	1446	07/14/2007	07/14/2007	Paid	\$0.00	\$950,000.00	\$950,000.00
WORLD TRAVEL ...	3939	06/01/2014	07/01/2014	Paid	\$0.00	\$534.45	\$534.45

Rows per page: 10 1-10 of 3697

Vendor Fiscal vs. Calendar Totals

Legend: Calendar year payout total (blue), Fiscal year payout total (yellow)

Vendor Name: NORTHERN EQUI., PRG CONSTRUCTION, PRUDENTIAL INSURANCE, TYLER TECHNOLOGIES, OFFICE MAX, WORLD BERT STORE, FORD MOTOR COMPANY, ABC SUPPLY COMPANY, ABLE CONCRETE, REFRIGERANT SUPPLY INC.

Updated Card being Placed on Hub Page

The Card will generally be added to the bottom of the Hub Page and the Card can be dragged into any area of the Page. Once it is placed, the Save option can be selected in the top right of the screen.

Tyler Hub

Page Layout Designer Title: Invoice Processing

Buttons: Add Card, Cancel, Save

Filter By Year

Invoice Date Year: [Dropdown] Filter

Total Invoices 4,106

Open Batches \$5,587

Invoice 3-Way Match 0

Active Invoices: How is productivity?

Vendor Name	Invoice	Invoice Date	Due Date	Status	Discount Amt.	Net Amt.	Invoice Total
DEF SUPPLY CO...	1442	07/14/2007	07/14/2007	Paid	\$0.00	\$23,499.00	\$23,499.00
DEF SUPPLY CO...	1871	06/01/2009	07/01/2009	Paid	\$0.00	\$31,501.00	\$31,501.00
APPLE COMPUT...	1831	06/30/2009	07/30/2009	Paid	\$0.00	\$22,000.00	\$22,000.00

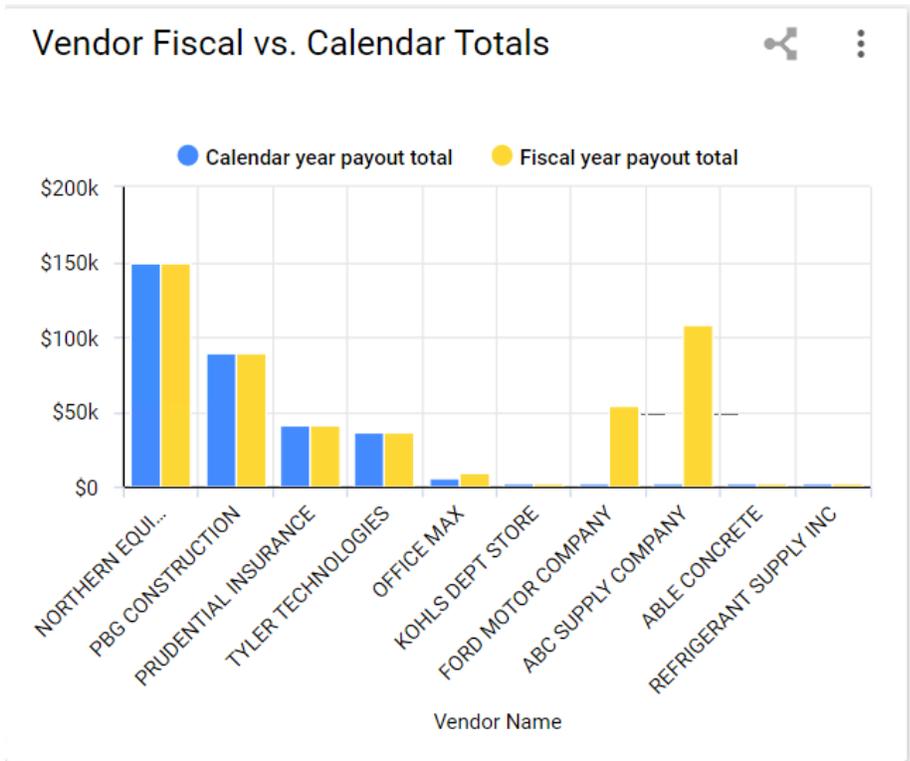
Batch Review

Batch	Clerk	Vendor Name	Net Amount
1	Jean Jones	VERIZON	\$1,000.00
1	Jean Jones	UNITIL ELECTR...	\$1,767.00
1	Jean Jones	BROWN INDUS...	\$787.00
11	Jean Jones	DEF SUPPLY C...	\$570.00
13	Jean Jones	OFFICE DEPOT	\$1,000.00
13	Jean Jones	OFFICE DEPOT	\$50.00
15	Jean Jones	DEF SUPPLY C...	\$113.89
15	Jean Jones	DEF SUPPLY C...	\$8,075.00

Rows per page: 8 1-8 of 3697

Saving Page Layout Designer

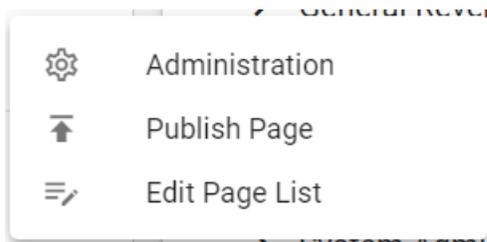
The newly designed Card is placed in the page and is ready to provide the user information.



Newly Designed Card

Editing Home Page

If each time you enter Tyler Hub you have to navigate to your preferred Hub Page, then why not make that page your home page? To do this, you can select Edit Page List from the Tyler Hub Menu.



Administrative Menu from Tyler Hub

In the Home Page drop down, the desired Hub Page can be selected. When launching Tyler Hub or clicking the Home button in Tyler Hub you will be directed back to the home page listed under Edit Page List.

Edit Pages

Group Pages By:
Product

Home Page:
Munis Landing Page

Tyler Hub

Munis Landing Page

Munis Reporting Center

New Page

Munis

Account Trending

Balance Sheet Monitoring

ADD START FRESH CANCEL SAVE

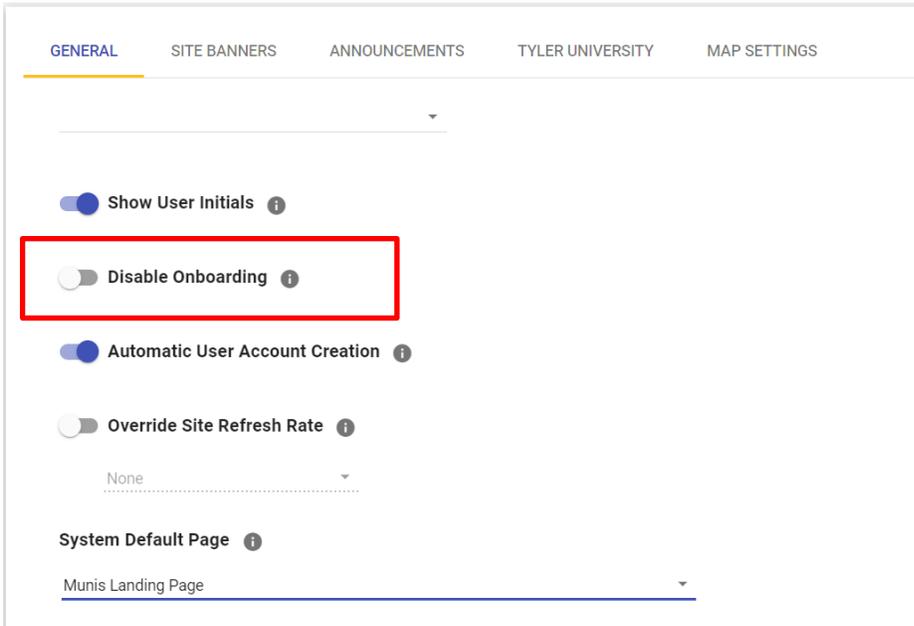
Personalizing the Tyler Hub Home Page

GLOBAL SETTINGS

Tyler Hub affords organizations the flexibility to display their own insignia, organization name, and logo in Tyler Hub. This is an organization wide configuration so that internal messaging, branding, and personalization can be applied.

Site Customization

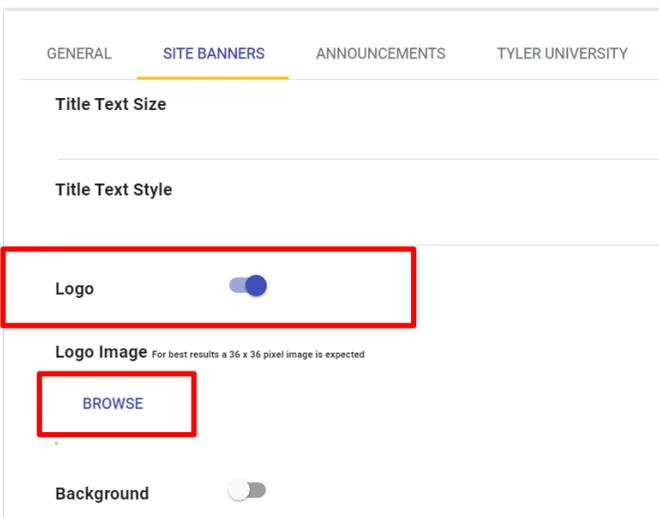
Disabling Onboarding is an option that will not force new users to go through the Tyler Hub Onboarding process. This is a choice that can be made if you have a go-live on a new to Tyler Hub application and you want to control the change the users are faced with on the first day of go-live. This can be toggled at any time.



Tyler Hub General Settings to Disable Onboarding

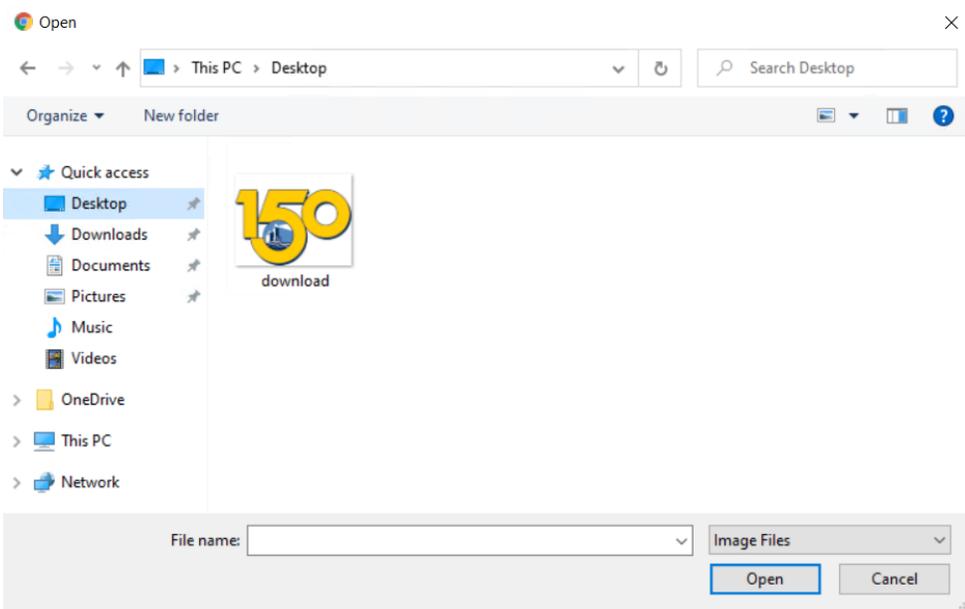
Settings, Banners, and Logos

The site banner can be selected to display environment information (Prod, Train, Test), organization name, or any other label you would like. This is helpful for IT groups managing multiple entities, so you can be sure which environment you are working within. To update the Logo, any small image can be used, square images are best. On the Site Banners tab in Settings, select toggle switch next to Logo and select the browse button to choose a file from your computer.



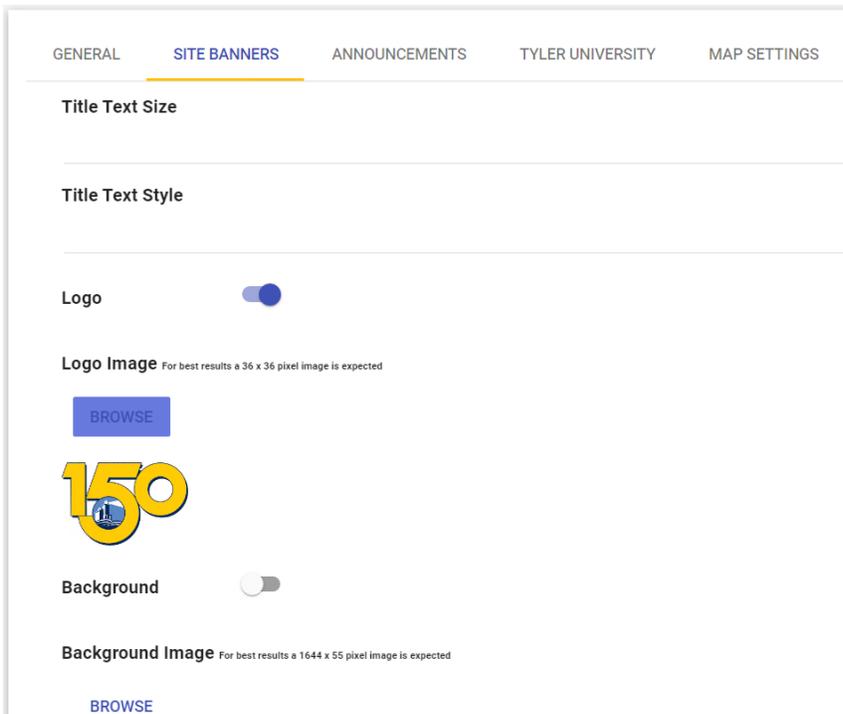
Tyler Hub Site Banners Management Screen

Select the file from your computer. Image file types like jpeg, png, etc. are expected.



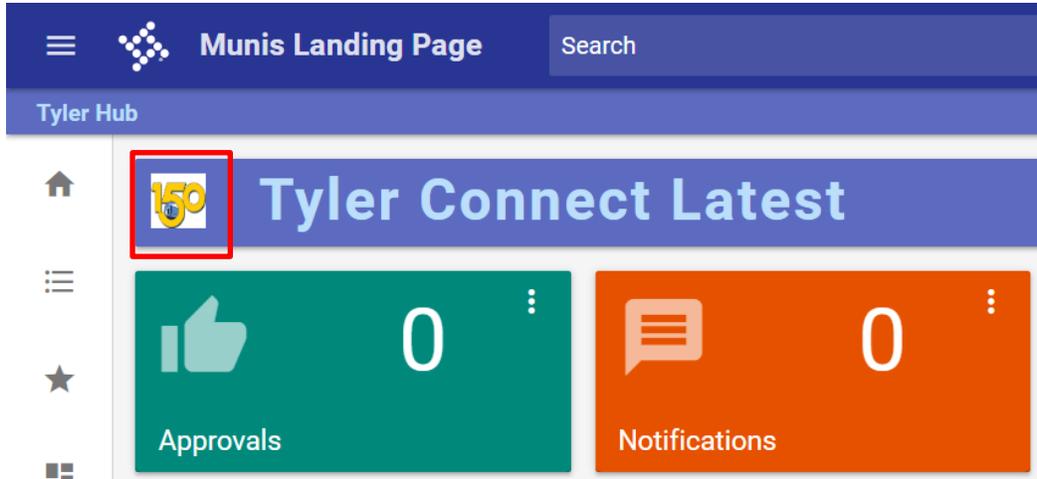
Selecting Logo for Tyler Hub

A preview of the logo will appear in the Banner Settings screen and the formatting can be saved.



Publishing the Logo Change

The logo will be visible in the Tyler Hub Banner once reloading Tyler Hub. This is a great opportunity to share the branding for current initiatives, anniversary celebrations and more.

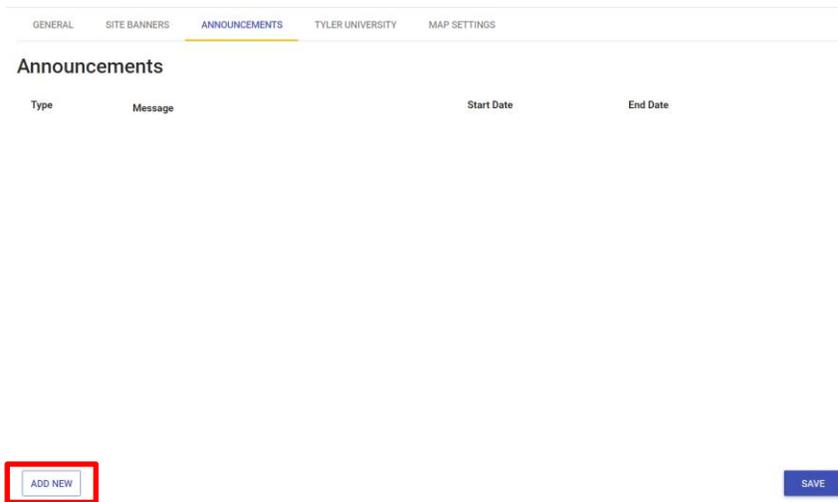


Tyler Hub Displaying the New Logo

Announcements

Announcements are useful messages that will alert users when entering Tyler Hub. This is a great way to reinforce business practice changes, outages, and scheduled maintenance. They can be set up in Hub Settings under the Announcements tab. Announcements can be scheduled to begin and end. The type and message are also customizable.

Click Add New at the bottom of the window to add a new announcement.



Announcements Configuration Screen

Select the Type, Message, Start Time, and End Time. Then click Save.

GENERAL SITE BANNERS **ANNOUNCEMENTS** TYLER UNIVERSITY MAP SETTINGS

Announcements

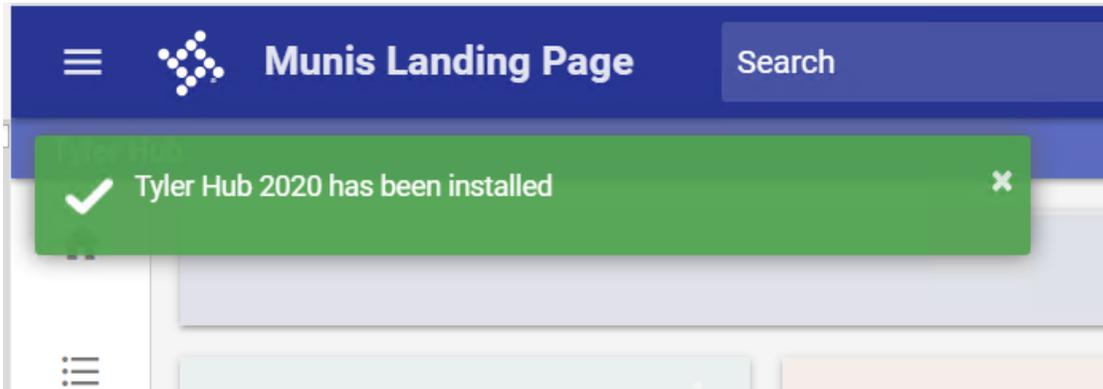
Type	Message	Start Date	End Date	
Success	Tyler Hub 2020 has been installed	03/04/2020 00:00	03/05/2020 00:00	Active

33 / 1000

ADD NEW SAVE

Successfully Created Announcement

Below is the displayed alert. This can be dismissed by the user and it will not display again.

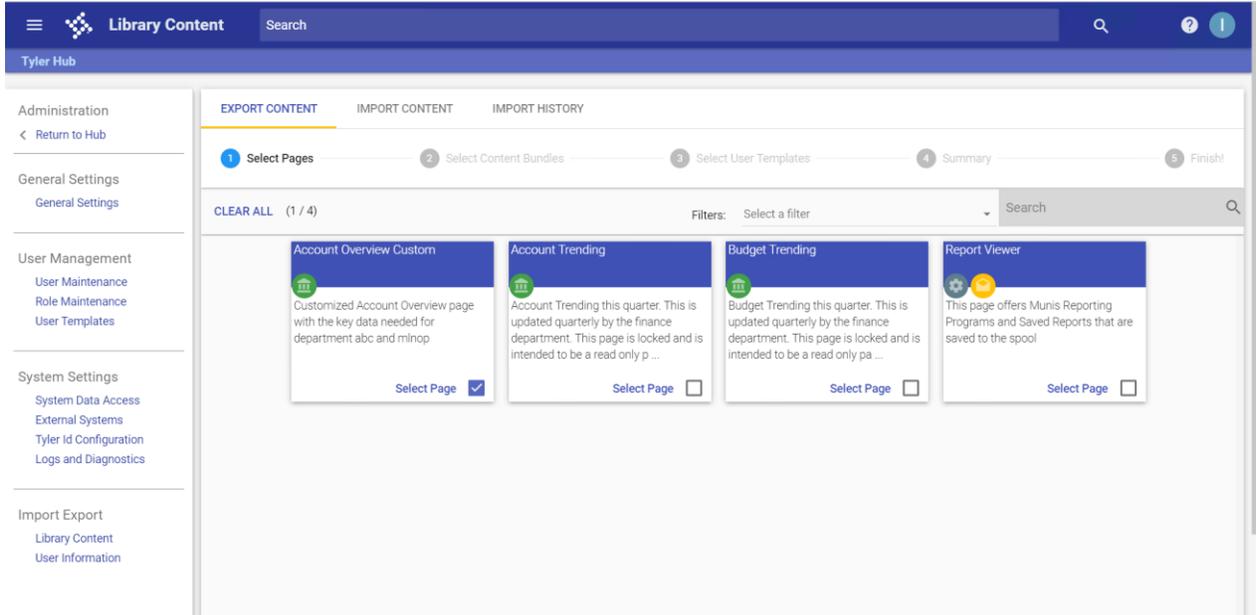


Announcement in Tyler Hub

Export/Import

Like Munis Permissions and Workflow, Tyler Hub’s Content Library content changes can be made in Tyler Hub’s non-production environments, exported, then imported into production. This will allow changes to be fully tested without impacting business and then applied without changing each individual’s permission, role, or content.

In Administration, select Library Content from the Administration menu on the left. This will display the Export Content tab. Select this tab and select which content is to be exported.



Selecting Content to Export in the Export Content Screen in Library Content

After selecting the Pages, content bundles and templates can be selected. This is a good opportunity to define your end user basic bundle in test and then import it to production.

EXPORT CONTENT IMPORT CONTENT IMPORT HISTORY

1 Select Pages 2 Select Content Bundles 3 Select User Templates 4 Summary 5 Finish!

CLEAR ALL (1 / 4) Filters: Select a filter Search

<input checked="" type="checkbox"/>	Basic Bundle	Pages: 3	▼
<input type="checkbox"/>	Department Head Bundle	Pages: 5	▼
<input type="checkbox"/>	Manager Bundle	Pages: 5	▼
<input type="checkbox"/>	Utility Billing Clerk	Pages: 3	▼

BACK NEXT

Selecting Content Bundles for Export

EXPORT CONTENT IMPORT CONTENT IMPORT HISTORY

1 Select Pages 2 Select Content Bundles 3 Select User Templates 4 Summary 5 Finish!

CLEAR ALL (1 / 2) Search

<input checked="" type="checkbox"/>	Beginner Template	VIEW DETAIL
<input type="checkbox"/>	Hiring Manager Template	VIEW DETAIL

Selecting User Templates for Export

Once the content is selected, the summary page will detail all items being exported. And the Export can be completed.

EXPORT CONTENT IMPORT CONTENT IMPORT HISTORY

✓ Select Pages ✓ Select Content Bundles ✓ Select User Templates **4 Summary** 5 Finish!

Applicant Screening

Billing Activities

Budget Trending

Invoice Processing

Munis Landing Page

Munis Reporting Center

Bundles

Total bundles to Export :

Basic Bundle
Number of pages in Bundle: 3

User Templates

Total User Templates to Export : 1

Beginner Template

Reviewing the Exported Selections

Exported file will be available for download from your browser.

EXPORT CONTENT IMPORT CONTENT IMPORT HISTORY

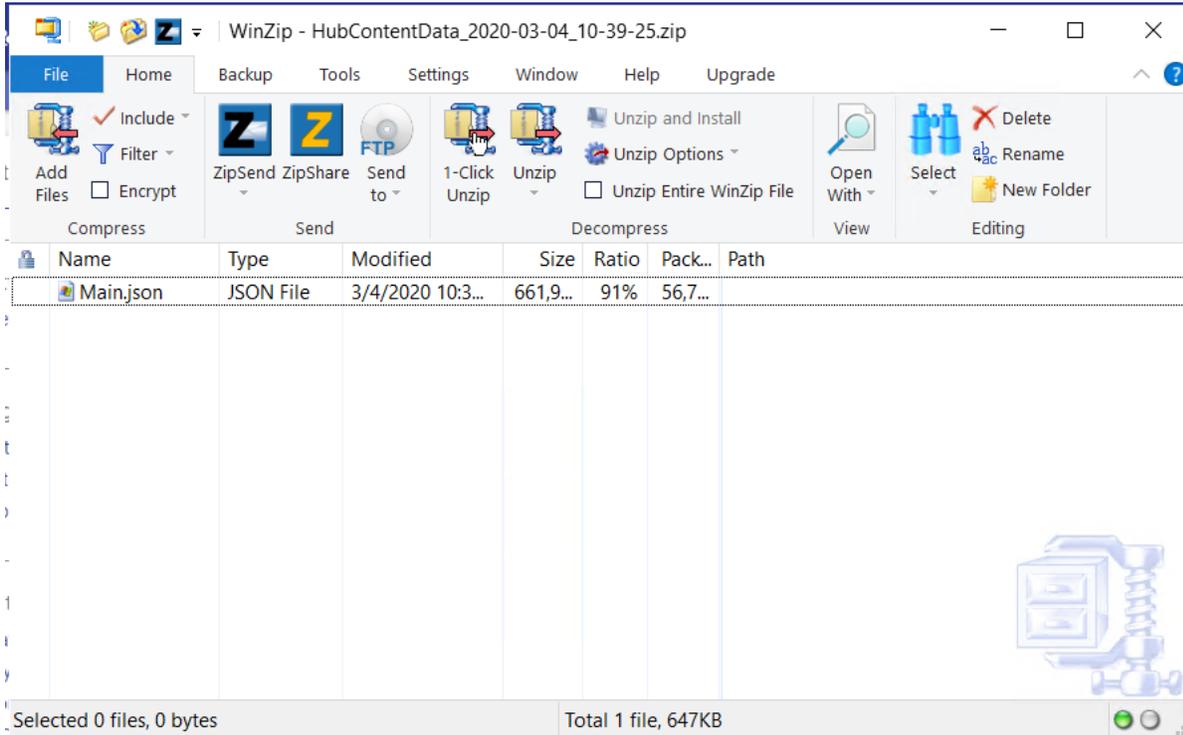
✓ Select Pages ✓ Select Content Bundles ✓ Select User Templates ✓ Summary **5 Finish!**

Nice Work
Proceed to export below!

[BACK](#) [EXPORT](#)

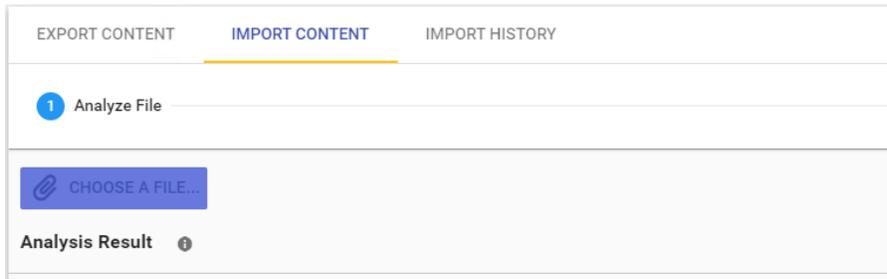
Export Content Export Screen

The downloaded file is a .zip file containing the json file needed to import back to Tyler Hub to upload the content.



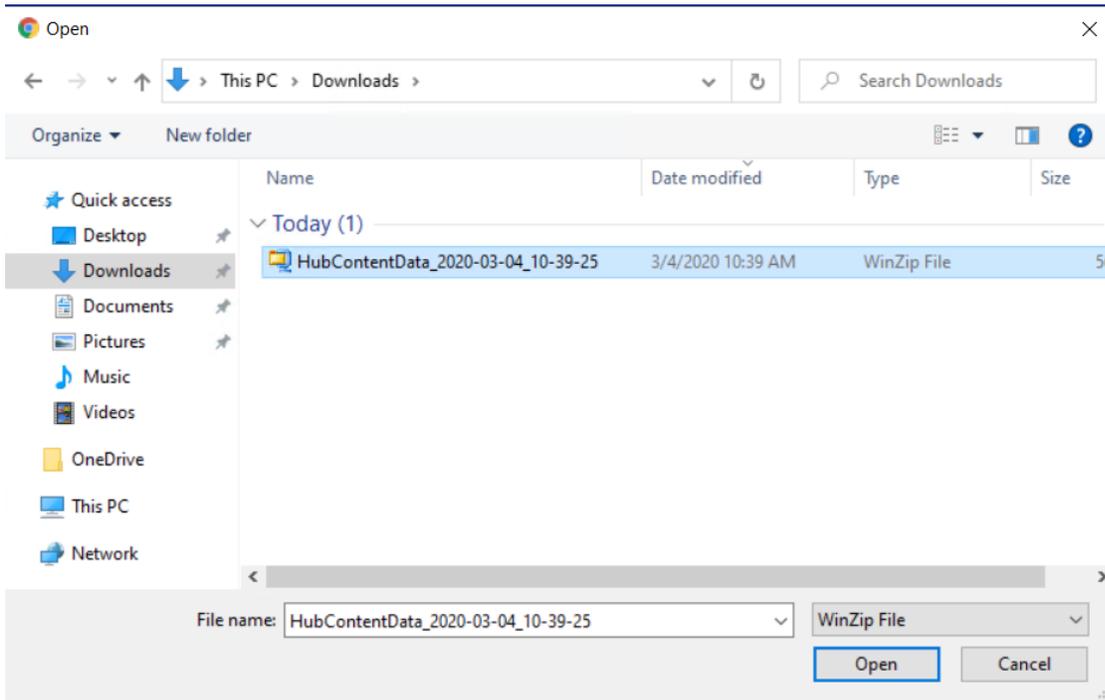
Exported Content in Local Directory

To perform the import, go to the Import Content tab and select Choose a File...



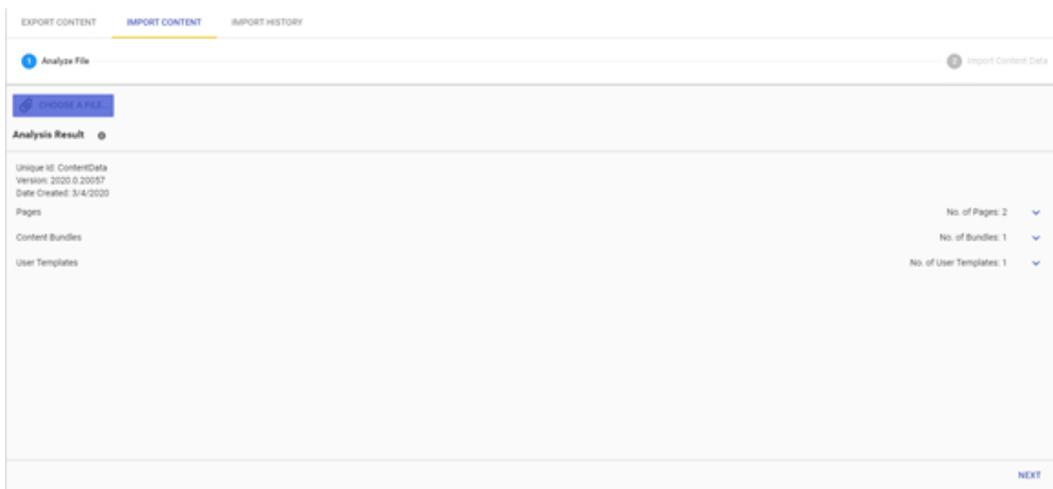
Import Content File Selection

On your computer, select the json file that was exported from your Tyler Hub source.



File Explorer File Selection for Import

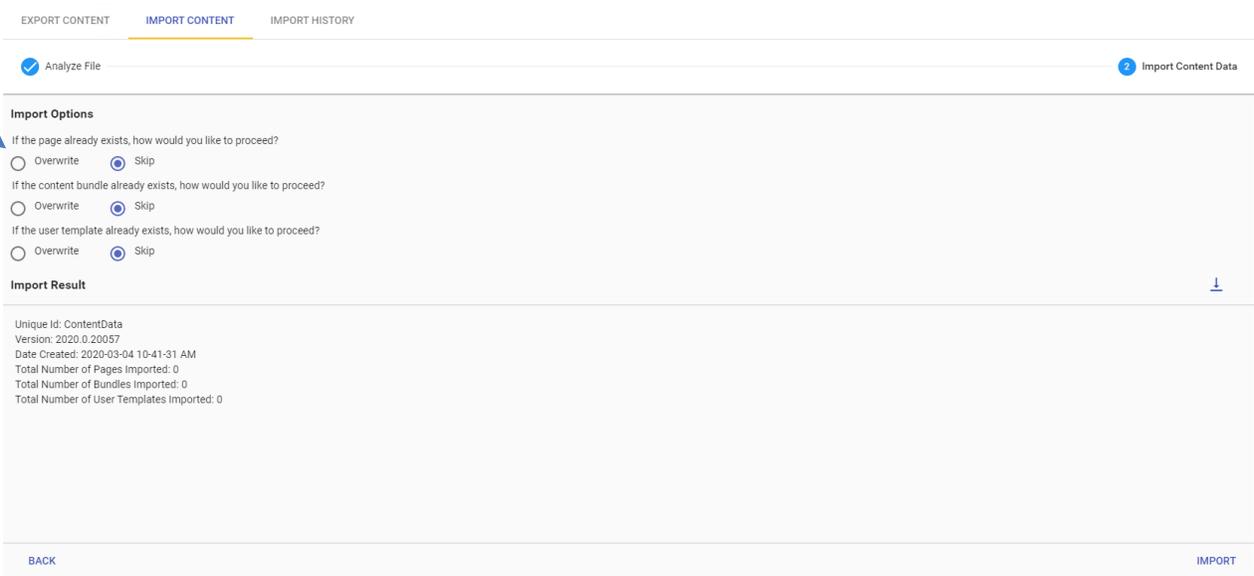
The summary information, like the export summary, will preview and then the content can be imported.



Content Import Summary

Any duplicates will be listed, and each can be skipped or overwritten using the radio buttons listed in the Import Options.

The content will import with the result listed in the lower part of the Import Content screen.



EXPORT CONTENT **IMPORT CONTENT** IMPORT HISTORY

Analyze File 2 Import Content Data

Import Options

If the page already exists, how would you like to proceed?
 Overwrite Skip

If the content bundle already exists, how would you like to proceed?
 Overwrite Skip

If the user template already exists, how would you like to proceed?
 Overwrite Skip

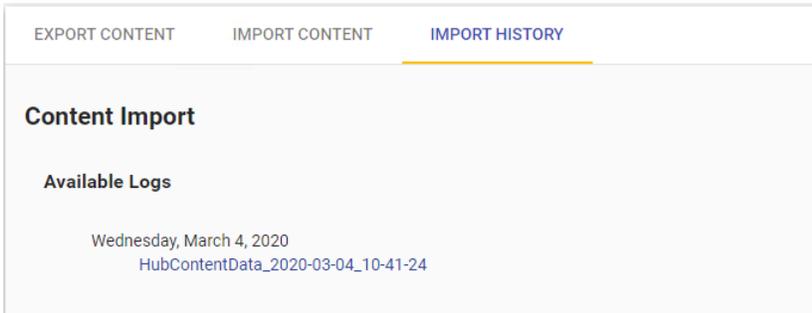
Import Result ↓

Unique Id: ContentData
 Version: 2020.0.20057
 Date Created: 2020-03-04 10:41:31 AM
 Total Number of Pages Imported: 0
 Total Number of Bundles Imported: 0
 Total Number of User Templates Imported: 0

[BACK](#) [IMPORT](#)

Import Results Summary

This import will also exist in the import history.



EXPORT CONTENT IMPORT CONTENT **IMPORT HISTORY**

Content Import

Available Logs

Wednesday, March 4, 2020
 HubContentData_2020-03-04_10-41-24

Import History

User Administration

User Administration allows for permission and roles to be assigned to a user. It also allows for content to be pushed to a user's account. This will help drive adoption of specific sets of content. This can be achieved a few different ways.

To make mass changes, like turning on or off the onboarding feature for specific users or pushing out a content bundle, navigate to the User Maintenance section of Hub Administration. Select Mass Assign from the User Maintenance screen.

The screenshot shows the 'User Maintenance' page in Tyler Hub. The top navigation bar includes a menu icon, the text 'User Maintenance', and a search field. Below this, the 'Tyler Hub' header is visible. The left sidebar contains several menu categories: Administration (Return to Hub), General Settings (General Settings), User Management (User Maintenance, Role Maintenance, User Templates), System Settings (System Data Access, External Systems, Tyler Id Configuration, Logs and Diagnostics), and Import Export (Library Content, User Information). The main content area features four action buttons: 'ADD USER', 'AD SYNC', 'MASS ASSIGN' (highlighted with a red box), and 'MASS DELETE'. Below these buttons is a search bar and a table of users.

User Name ↑	First Name	Last Name
aaron.pollock	Aaron	Pollock
adam.clingensmi	Adam	Clingensmith
allyson.beran	Allyson	Beran
anne.nadzo	Anne	Nadzo
becky.johnson	Becky	Johnson
ben.higgins	Ben	Higgins
bobby.choi	Bobby	Choi
brandon.smith	Brandon	Smith
brian.ferry	Brian	Ferry

User Maintenance View

From the Mass Assign screen, you can select as many users as you want to update.

Mass Assign User Selection

Select the change you want to assign to all users, in this case a Bundle. Clicking Apply will push this bundle to all the listed users.

User Mass Assign Parameters

If a new user should have the same access as another existing user, you can copy that user. To do this, find the user in User Administration and select the Copy User button.

ADD USER AD SYNC MASS ASSIGN MASS DELETE

Search

User Name ↑	First Name	Last Name
holden.parker	Holden	Parker
holly.larou	Holly	LaRou
ian.biggers	Ian	Biggers
jason.riley	Jason	Riley
jay.kim	Jay	Kim
jay.maynard	Jay	Maynard
jessica.emmert	Jessica	Emmert
joe.beaulieu	Joe	Beaulieu
john.vicenzi	John	Vicenzi
joni.tompson	Joni	Tompson
joshiah.quinn	Joshiah	Quinn

User Name: Email:
 First Name: Access Level:
 Last Name: Onboarding Status:
 Last Login:

Current Roles
 Add Application Rights
 Basic Viewer Editor Publisher Content Administrator System Administrator

User Data Access
 Add Data Access
 Accounts Payable Administration Asset Management Asset Performance Bids Budget Capital Assets Contracts Diagnostics
 Employee Expense General Revenue Human Resources Inventory General Ledger Licensing Payroll Permits Purchasing
 Security Student Activity System Tax Inspections Utility Billing Vendors Workflow Other Request Management
 Parcels Common Analytics GD Analytics HR Analytics FM Analytics Classes Facilities Memberships Project Accounting

Assign Content
 Apply Bundles:
 Apply Templates:

Current Pages
 Account Trending Balance Sheet Monitoring Budget Monitoring Hiring Hiring Manager Invoice Processing Munis Landing Page
 Munis Reporting Center New Page Vendor Monitoring

COPY USER UNDO CHANGES DELETE SAVE

User Administration

This will launch the Copy User screen. This program will allow the user in User Administration to be copied an existing user, so the new user must be added first. Select the user from the drop down and select which content to copy, then click Copy to apply the content and settings.

Copy User

Copy From User	Copy To User
User Name ian.biggers	Selected User chris.deroche
Full Name Ian Biggers	Full Name Chris Deroche
Email ian.biggers@tyleruc.com	Email chris.deroche@tyleruc.com

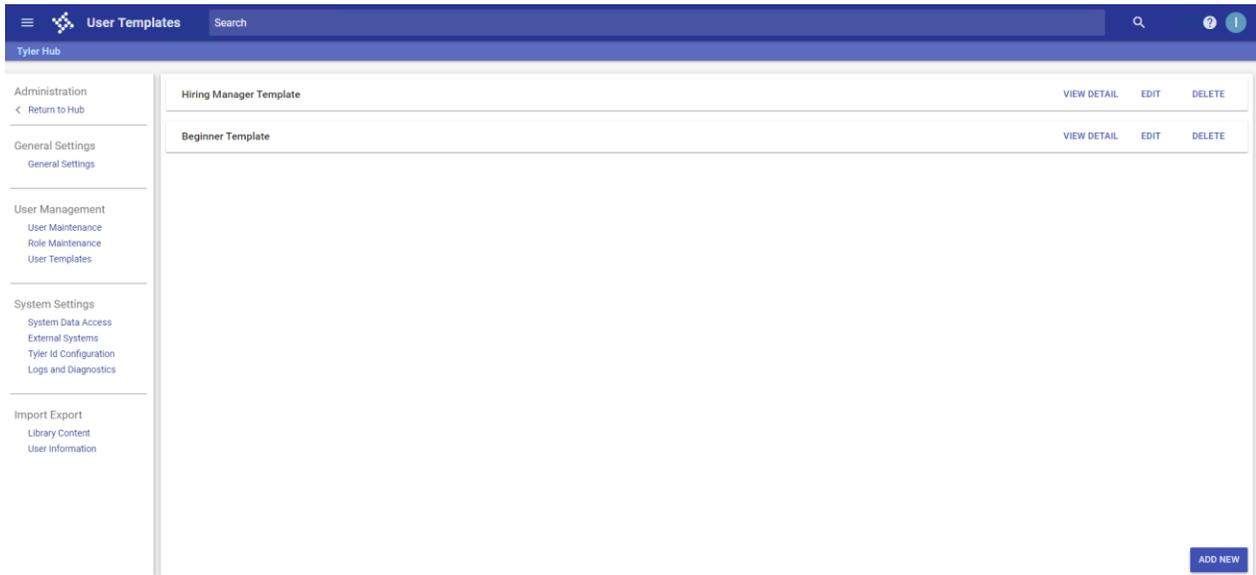
- Copy User Settings ⓘ
- Copy User Favorites ⓘ
- Copy User Roles ⓘ
- Copy User Pages ⓘ

CANCEL COPY

Copying from One User to Another

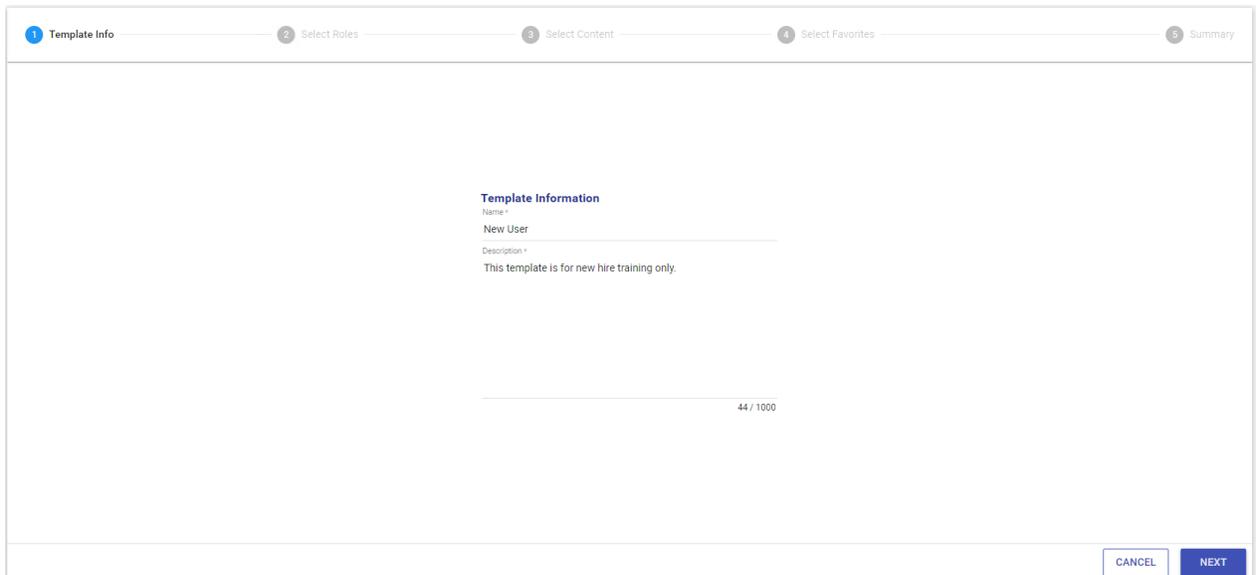
User Templates

User Templates are a great way to streamline the addition of users into Munis. It also allows for changing a user's access quickly without going through user maintenance, role maintenance, and individual content assignments. In User Templates, select Add New from the lower right of the User Templates.



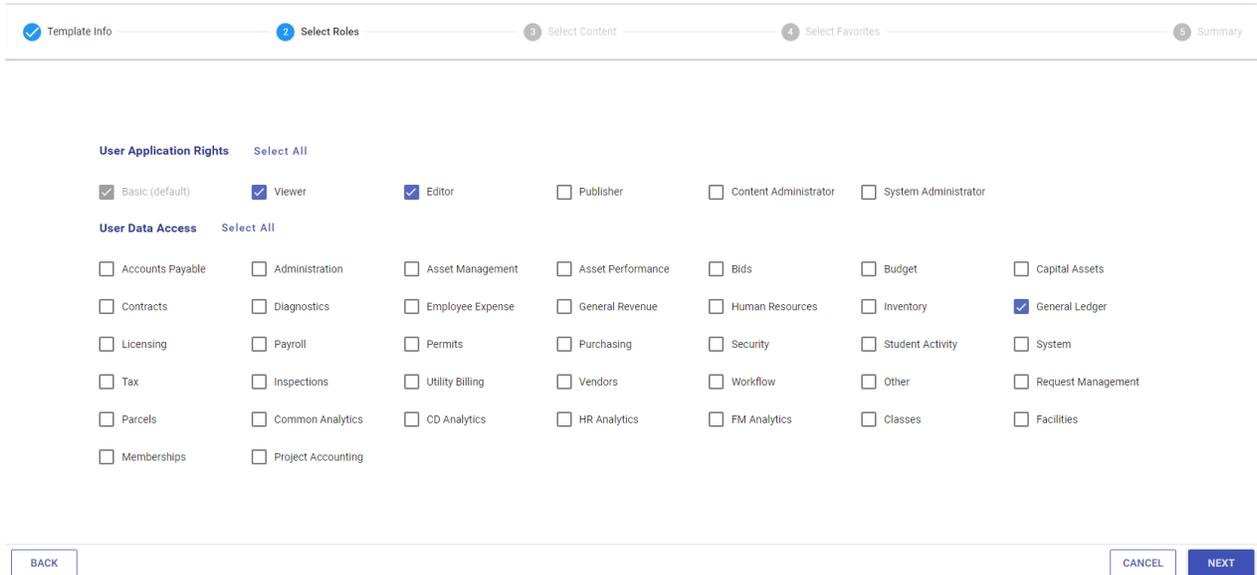
User Templates

In the Add wizard, enter the general Template Information, including the name of the template and the description. Click Next to move to the next step.



Adding a New User Template

Under Select Roles, select the User Application Rights and User Data Access that should be applied to this template. Click Next, to move into selecting the Content.



Template Info
 Select Roles
 Select Content
 Select Favorites
 Summary

User Application Rights [Select All](#)

Basic (default)
 Viewer
 Editor
 Publisher
 Content Administrator
 System Administrator

User Data Access [Select All](#)

Accounts Payable
 Administration
 Asset Management
 Asset Performance
 Bids
 Budget
 Capital Assets

Contracts
 Diagnostics
 Employee Expense
 General Revenue
 Human Resources
 Inventory
 General Ledger

Licensing
 Payroll
 Permits
 Purchasing
 Security
 Student Activity
 System

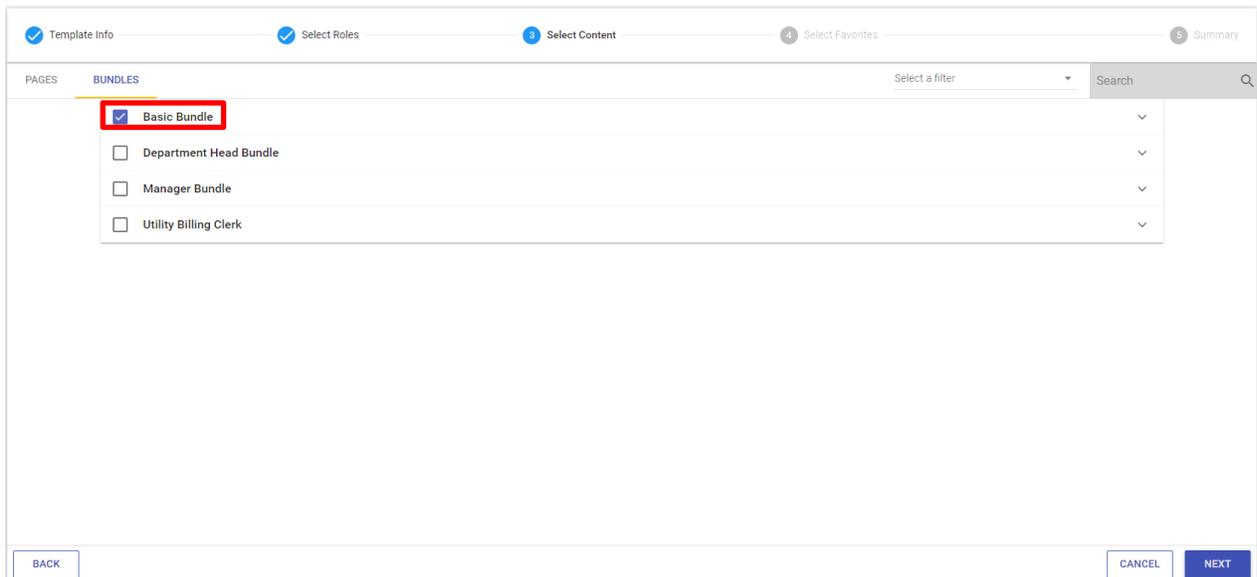
Tax
 Inspections
 Utility Billing
 Vendors
 Workflow
 Other
 Request Management

Parcels
 Common Analytics
 CD Analytics
 HR Analytics
 FM Analytics
 Classes
 Facilities

Memberships
 Project Accounting

Selecting New Template Roles

When selecting Content, individual pages and bundles can be selected. Here choose a Bundle to be applied to all new users. Click Next to continue.



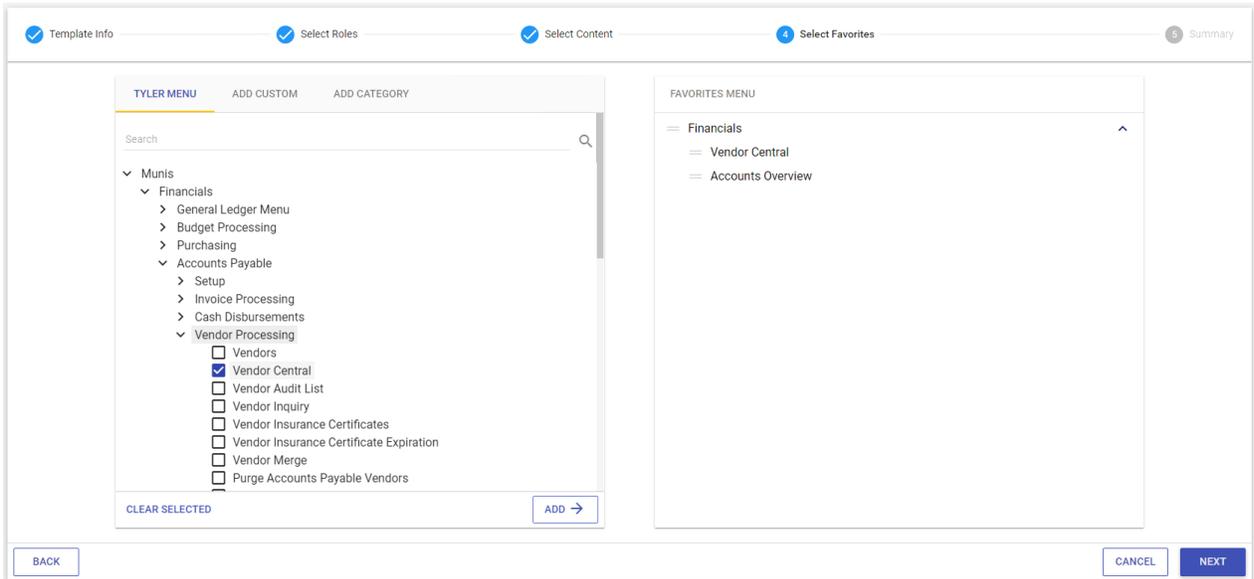
Template Info
 Select Roles
 Select Content
 Select Favorites
 Summary

PAGES **BUNDLES** Select a filter Search

Basic Bundle ▼
 Department Head Bundle ▼
 Manager Bundle ▼
 Utility Billing Clerk ▼

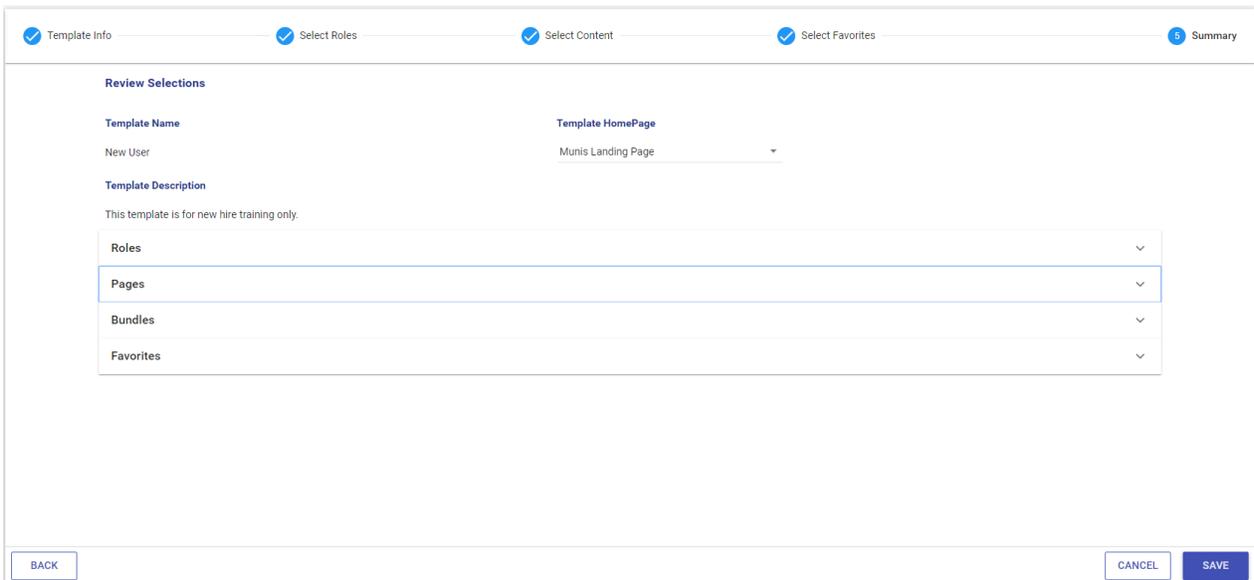
Selecting New Template Bundles

A major benefit to Templates is adding pre-build favorites for the new users. Using the menu, select the programs which should appear on the Favorites menu for the user. The Add button will move them into the Favorites menu. Click Next to move to the Summary.



Selecting New Template Favorites

In the Summary, select the Home Page for the new user and review the selected content. If everything is correct, Save the template for use.



New Template Summary of Selections

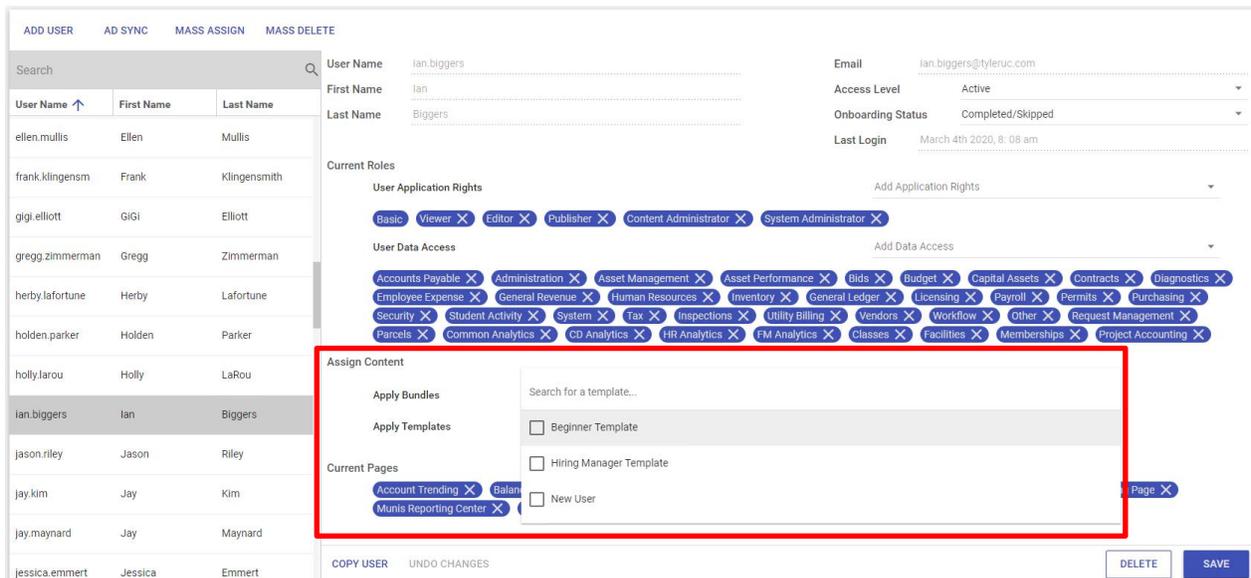
The new template will be available for use in the User Templates list.

Hiring Manager Template	VIEW DETAIL	EDIT	DELETE
Beginner Template	VIEW DETAIL	EDIT	DELETE
New User	VIEW DETAIL	EDIT	DELETE

[ADD NEW](#)

New Template Available in Templates List

To assign a template to a user, find the user in User Maintenance. In the Assign Content section, select the template from the dropdown. Save the changes to complete.



The screenshot shows the 'User Administration' interface for user 'ian.biggers'. The 'Assign Content' section is highlighted with a red box, showing a dropdown menu with the following options:

- Apply Bundles
- Apply Templates
 - Beginner Template
 - Hiring Manager Template
 - New User

The 'Current Pages' section below the dropdown shows 'Account Trending', 'Balance Reporting Center', and 'Page'.

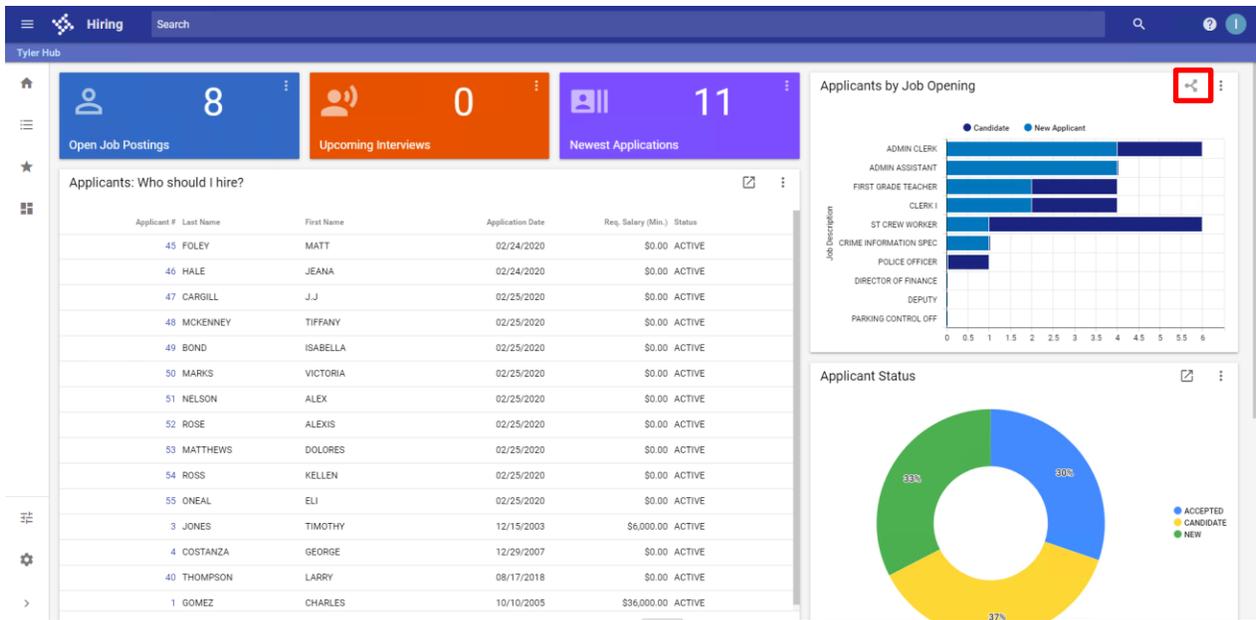
Applying Template to User in User Administration

DATA ANALYSIS

From its beginning, Tyler Hub was designed to provide data analysis and reporting. While it will not replace your custom or canned reports, it can be used to surface the most important or frequently queried items.

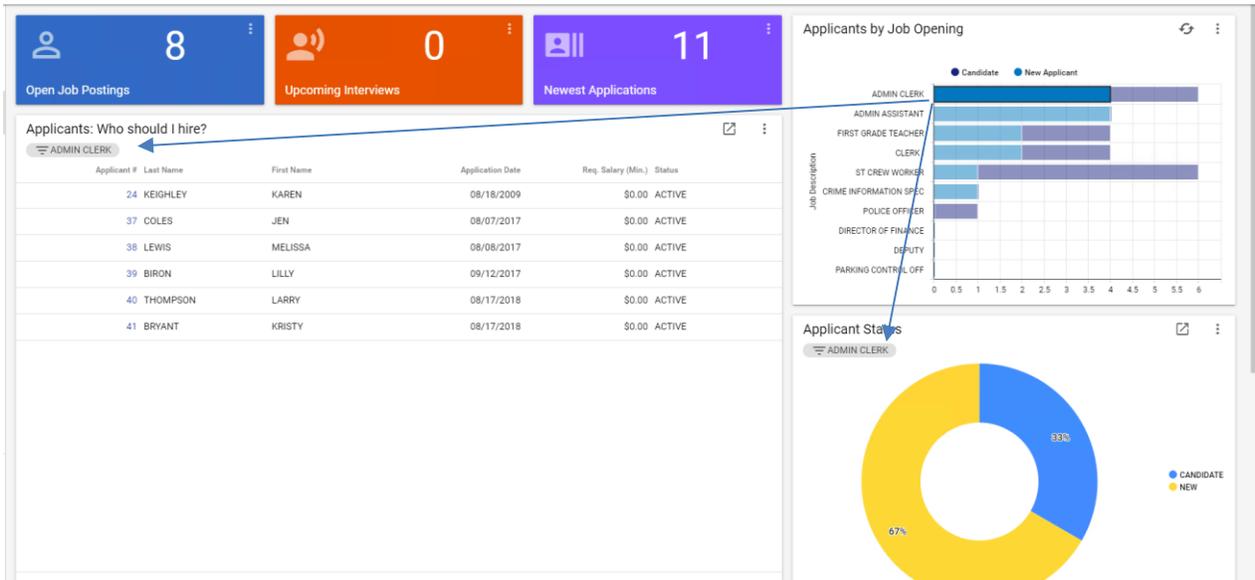
Filters

Filters can be applied in a couple of ways in Tyler Hub, utilizing cards. One way is by using a card to filter other cards. The card that can perform filtering of others is called the origin card and is denoted by the symbol below. This means clicking on a chart element in that card will filter data in other cards.



Tyler Hub Page with Filter Designators in Certain Hub Cards

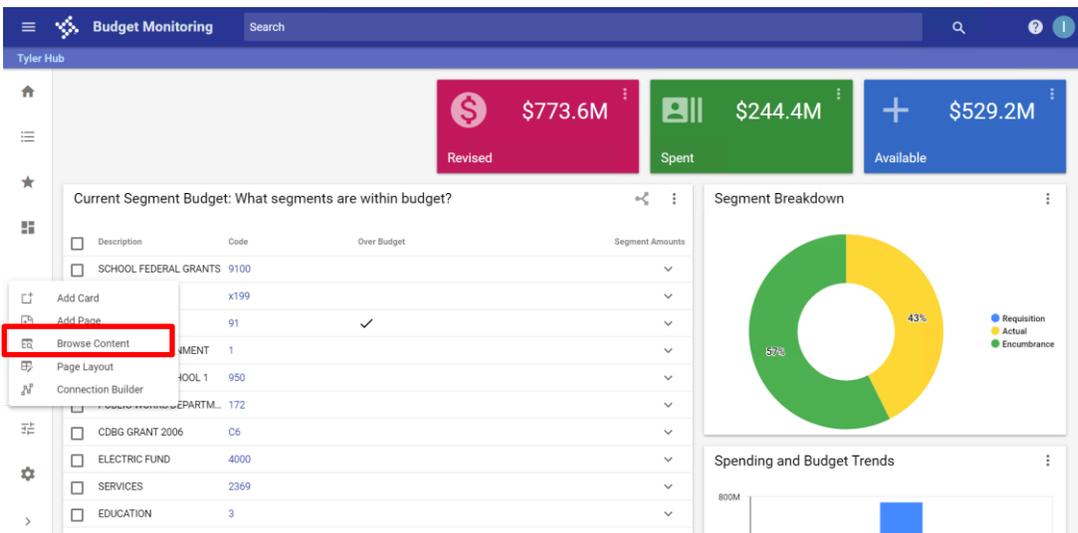
By clicking the Admin Clerk, New Applicant chart element, the Applicants and Applicant Status visualizations will update. The cards will only include applicants that fit the job opening of Admin Clerk and the status code of new applicant. Filtering on the cards is denoted by the drilldown label within the card.



Hub Page Filtered Based on Applicants by Job Opening Chart Selection

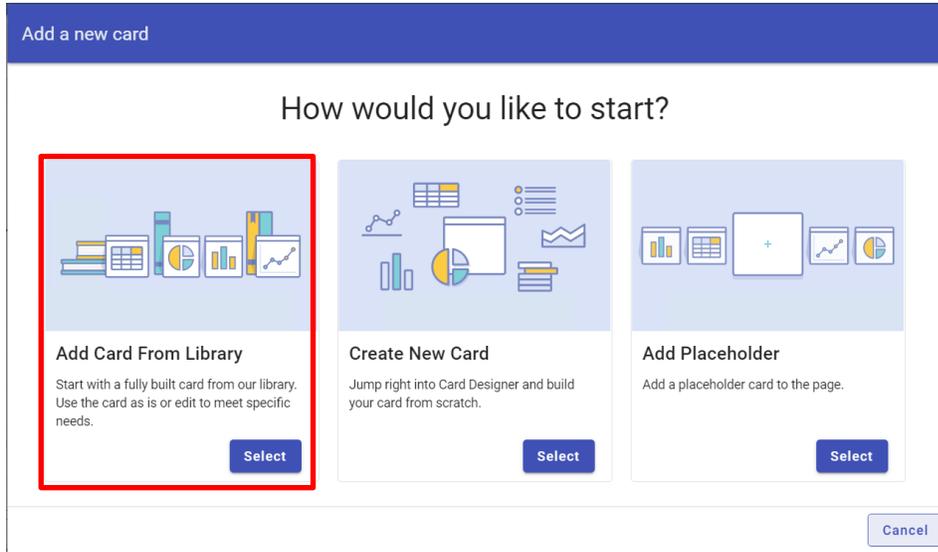
Connecting Cards

Cards will filter from the origin card once a connection has been established. To create a filter card, the card must first be added. On this Budget Monitoring Page, it would be helpful to have a Fund filter, so only certain funds could be reviewed. To add a card, select the Add Card option from the Edit Content menu.



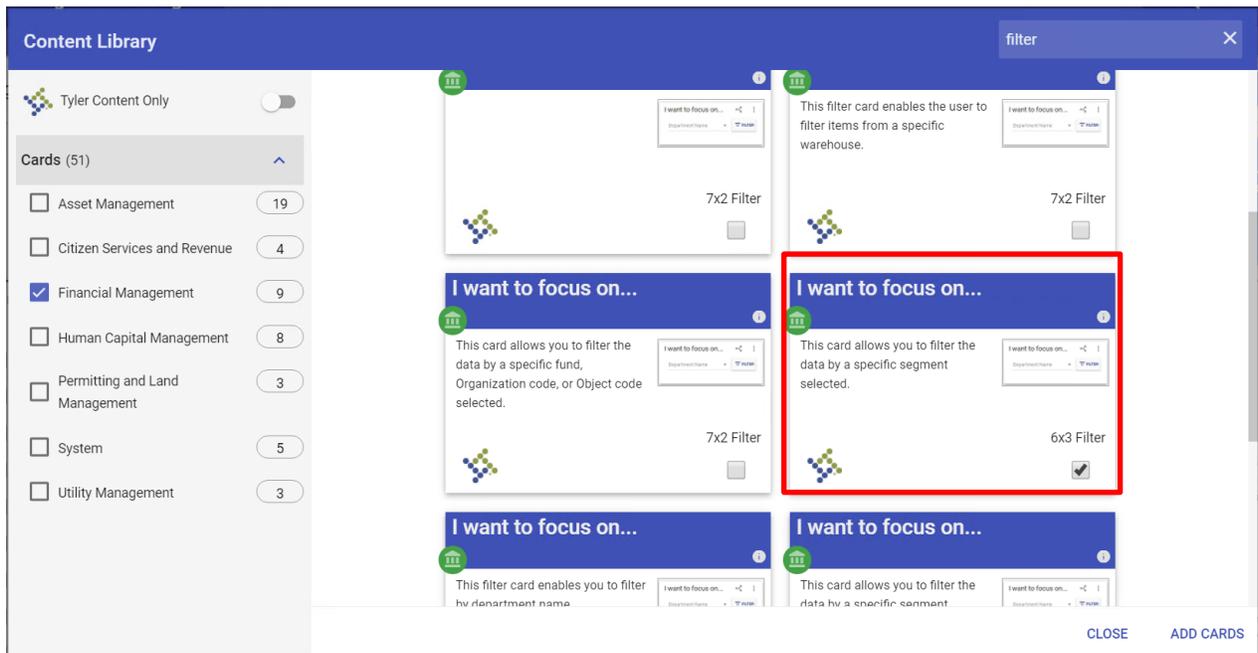
Selecting Add Card from the Content Menu

When adding the new card, several filtering cards already exist, selecting Add Card from Library will get the card you need.



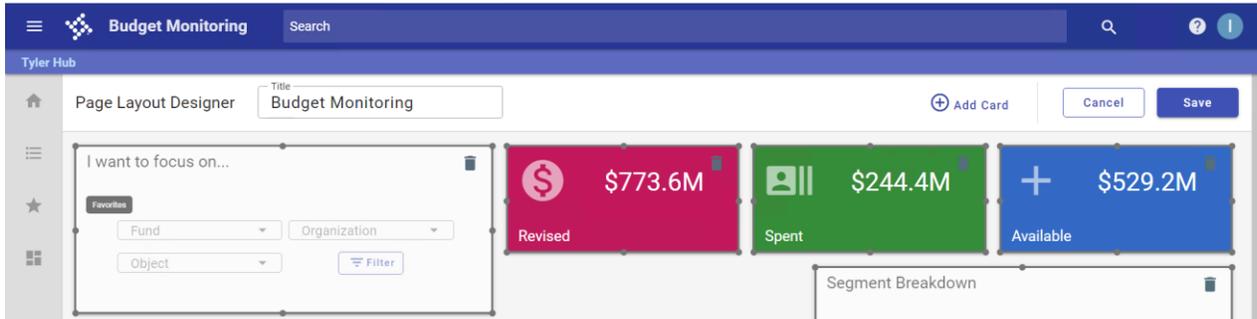
Adding a New Card Starting Screen

The filtering cards have been made in multiple content areas of Tyler Hub. With the Budget Monitoring Page, it would make sense to use the GL Segment for filtering. Under Financial Management, search for the segment filtering card. Check the box to proceed with that card. Click Add Cards.



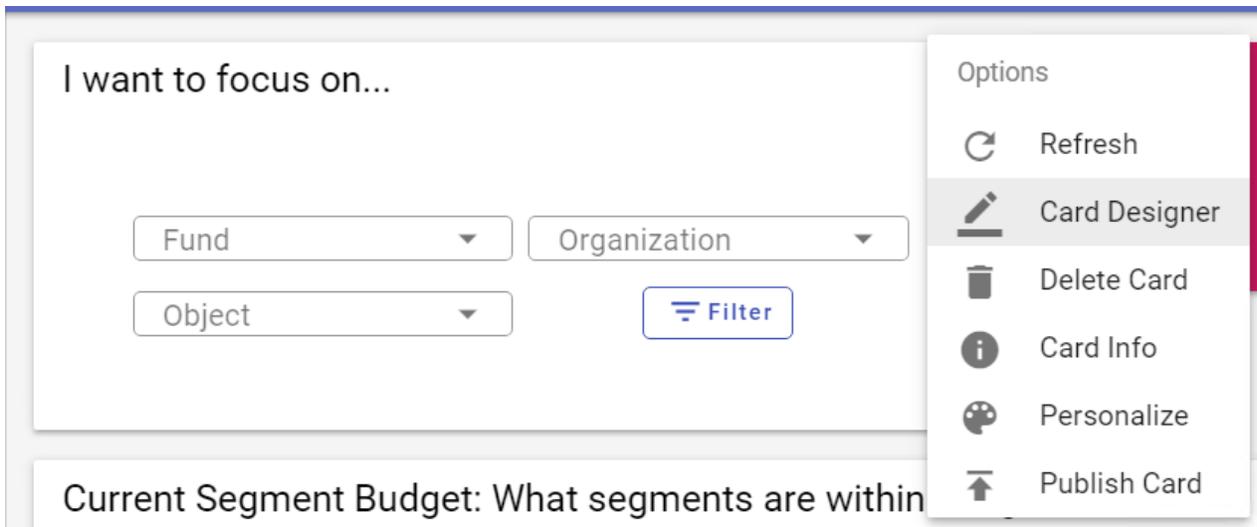
Selecting a Card from the Content Library Based

Place the Card into the Page Layout and click Save. Place this card somewhere prominent and accessible. Hub will default cards to the bottom of the page, so it is important to drag it to the desired location on the page.



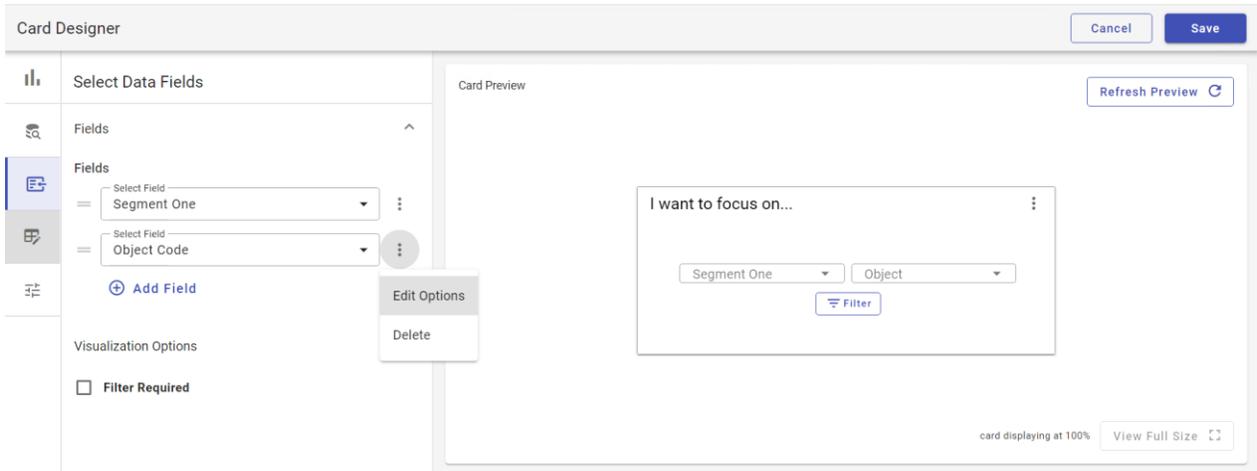
Saving Page Layout with New Card

Access the Card Designer, to change the Card details to the needs of the new filter.



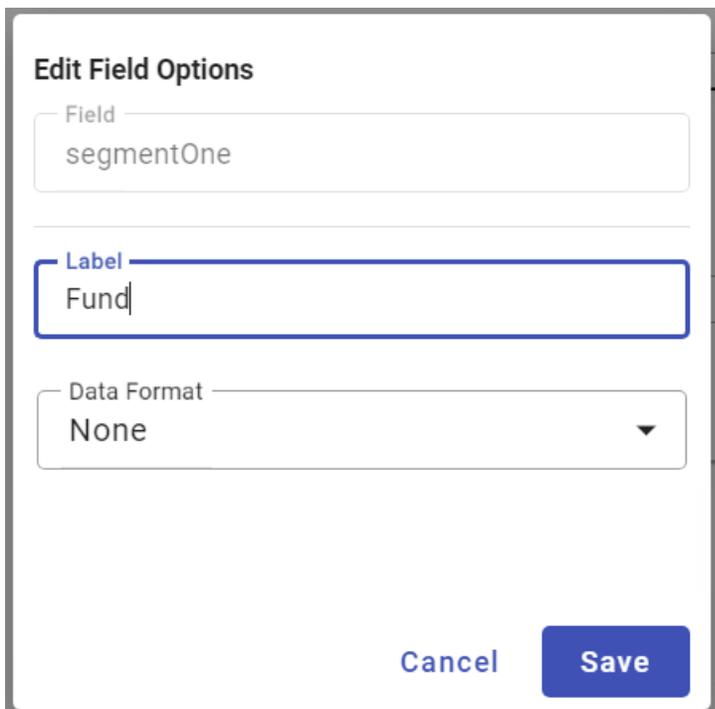
Accessing Card Designer from Card Options

In the Card Designer, on the Select Data Fields tab, remove the Object Code and Organization Code from the Fields to make only Segment One (Fund in Munis) the filter choice.



Deleting Defaulting Fields from Card

Clicking the vertical three dots next to Segment One, will open the Edit Options choice from the menu. In Edit Options, SegmentOne can be renamed to Fund. This is what the end user will see on the filter.



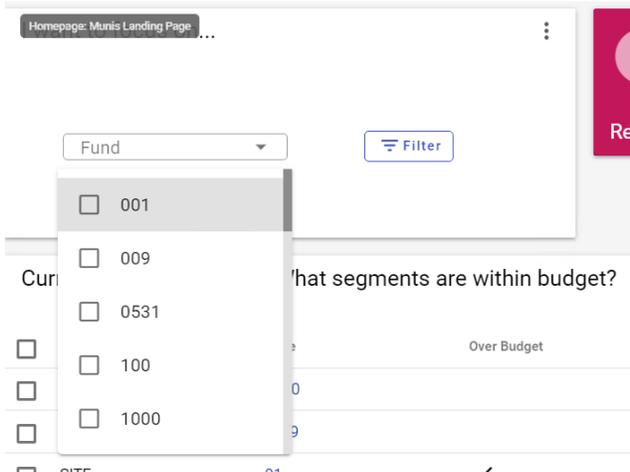
Edit Field Options

The Preview shows that the Filter will have Funds displayed in the dropdown.



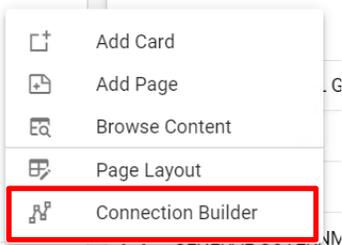
Card Designer Card Preview

Once the Card is saved, the Hub Page is refreshed with the new Card formatting. Selecting a fund here doesn't filter the rest of the content yet. A connection between the filter card and the remaining cards must be set up.



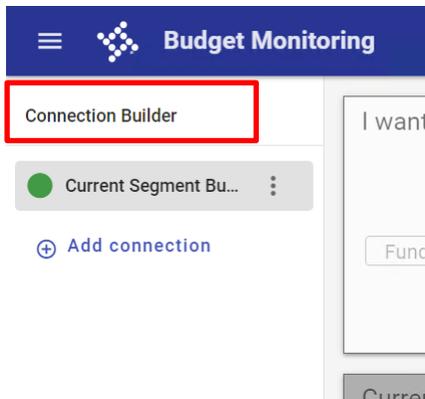
Selecting a Fund from the Filter Card

From the Hub Edit Content menu, select Connection Builder.



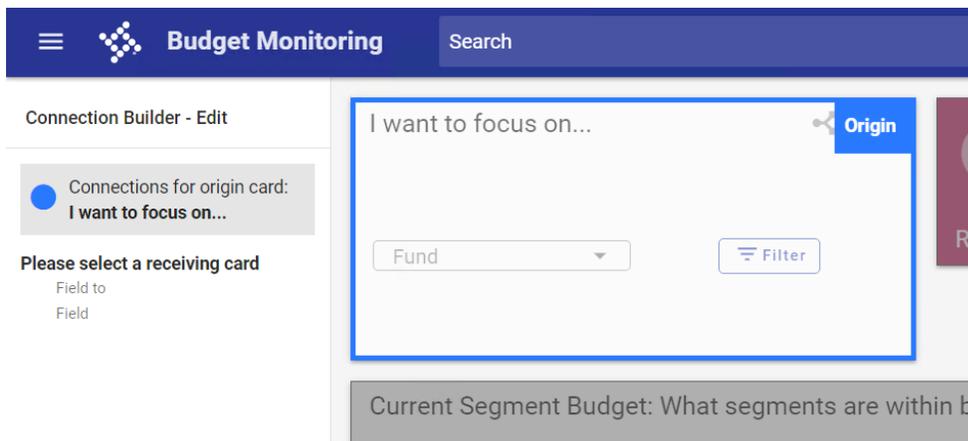
Selecting Connection Builder from Tyler Hub Administrative Menu

The Connection Builder will show all connections on the page, more than one can exist. Since this is a new card, a new connection must be established. Click Add Connection.



Using the Connection Builder to Add a Connection

The first step will be selecting the Origin card. This will be the card that when filtered, the connected cards will also filter. The new card added is the Origin card.



Selecting the Origin Card

Once that Card is selected, the available fields on the card will be listed, in this case only SegmentOne (Fund) is available. Save this to move onto the remaining cards.

Origin Card:
 I want to focus on...

Field: 

 Add Field

Cancel

Save

Selecting the Origin Card's Filtering Field

On the Hub Page, click the checkbox in the top right of each card you want to be filtered when selecting the Fund in the origin card.

Current Segment Budget: What segments are within budget?

<input type="checkbox"/>	Description	Code	Over Budget	Se
<input type="checkbox"/>	SCHOOL FEDERAL GRAN...	9100		
<input type="checkbox"/>	GENERAL FUND	x199		
<input type="checkbox"/>	SITE	91	✓	
<input type="checkbox"/>	GENERAL GOVERNMENT	1		
<input type="checkbox"/>	ELEMENTARY SCHOOL 1	950		
<input type="checkbox"/>	PUBLIC WORKS DEPART...	172		
<input type="checkbox"/>	CDBG GRANT 2006	C6		
<input type="checkbox"/>	ELECTRIC FUND	4000		
<input type="checkbox"/>	SERVICES	2369		



Selecting a Receiving Card

This is called the receiving card. The receiving card needs to have a field identified to match from the origin card. In this case, the field is Code (or Fund Code)

● Receiving Card:
Current Segment Budget: What segments are within budget?

Field segmentOne to

Field: ×

Receiving Card Filtering Field Selection

Select the remaining cards to be receiving the filter and select the proper field for matching.

Current Segment Budget: What segments are within budget?				Receiving <input checked="" type="checkbox"/>
<input type="checkbox"/>	Description	Code	Over Budget	
<input type="checkbox"/>	SCHOOL FEDERAL GRAN...	9100		

Card Selected to be Filtered from Origin Card

Connection Builder - Edit

Connections for origin card:
I want to focus on...

Revised

Field `segmentOne` to
Field `Code`

Current Segment Budget: What
segments are within budget?

Field `segmentOne` to
Field `Code`

Spent

Field `segmentOne` to
Field `Code`

Available

Field `segmentOne` to
Field `Code`

Segment Breakdown

Field `segmentOne` to
Field `Code`

Spending and Budget Trends

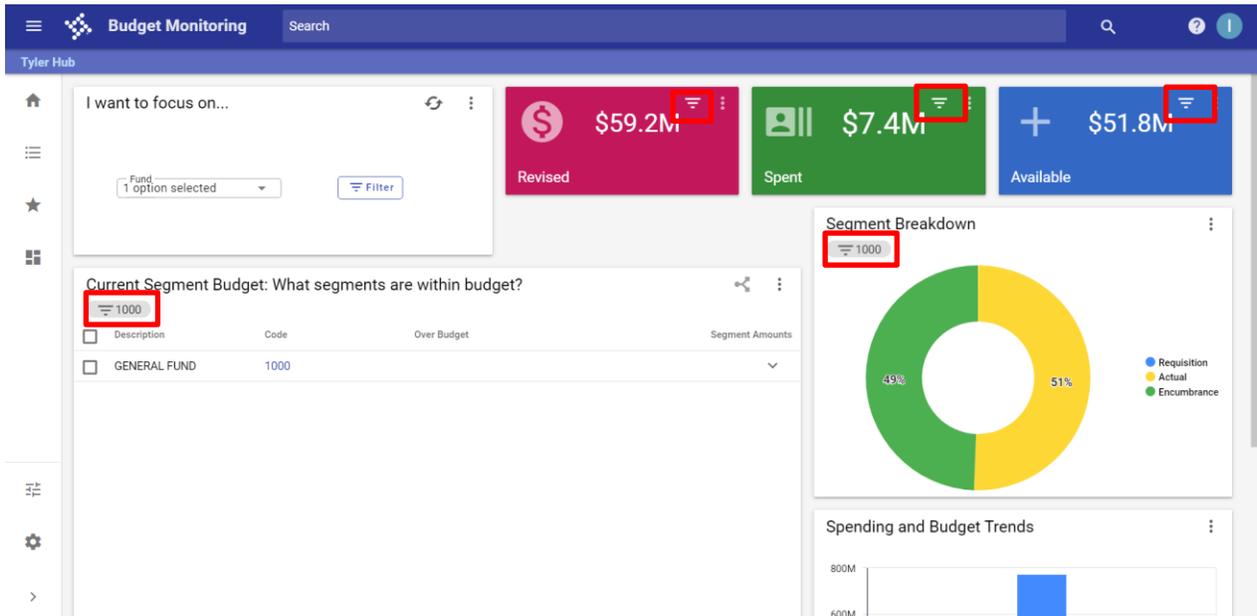
Field `segmentOne` to
Field

Cancel

Save

Connection Builder Connection List

Once Saved, the new connection will be useable in the Hub Page. Selecting fund 1000 in the "I want to focus on..." card filtered the remaining cards.



All Hub Cards filtering based on Card selection

Exporting Datasets

Tyler Hub allows for exporting of data and visualizations. A great benefit is being able to output exactly what you see or show on screen. In a Hub Card, select the Options menu and select Output Data.

Applicants: Who should I hire?

Applicant #	Last Name	First Name	Application Date	Req. Salary (Min.)	Status
45	FOLEY	MATT	02/24/2020	\$0.00	ACTIVE
46	HALE	JEANA	02/24/2020	\$0.00	ACTIVE
47	CARGILL	J.J	02/25/2020	\$0.00	ACTIVE
48	MCKENNEY	TIFFANY	02/25/2020	\$0.00	ACTIVE
49	BOND	ISABELLA	02/25/2020	\$0.00	ACTIVE
50	MARKS	VICTORIA	02/25/2020	\$0.00	ACTIVE
51	NELSON	ALEX	02/25/2020	\$0.00	ACTIVE

Options

- View Data
- Output Data**
- Refresh
- Card Designer
- Delete Card
- Card Info
- Personalize
- Publish Card

Selecting Output Data from Card Options

The Output Data window will prompt. This will allow you to output data for a few different purposes. The export can output to PDF for creating a presentation or report, the Excel export can be used for future data analysis in Excel, and the CSV export can be used to upload the data to another source. Outputting to PDF will retain the option to export the data and image. With this option the data will be pared down to accommodate output to standard paper size.

Output Data

Title
Applicants by Job Opening

File Type
 PDF Excel CSV

Pivot Table

Include
 Data Only Data & Image Image Only

Number of Records
 All Output first: Amount

Columns
 Select All
 Candidate Applicant Count Hiring Manager Job Class
 Job Description Job Family Job Identifier

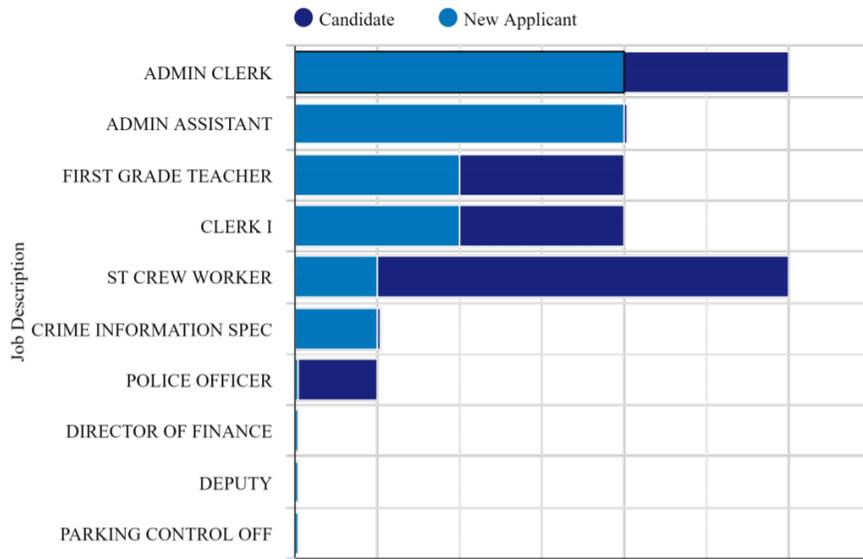
[CLOSE](#) [OUTPUT](#)

Output Data screen selecting PDF Data & Image

The image will proceed the data in the file. The image will be available for selection in the document if it is needed to be copied into a presentation.

Applicants by Job Opening - Tyler Hub

3/4/2020



PDF Output of Chart from Hub

The data will be in a simple to read table.

Applicants by Job Opening - Tyler Hub		3/4/2020	
Candidate	Applicant Count	Job Description	Position Status
5		ST CREW WORKER	ACTIVE
2	4	ADMIN CLERK	ACTIVE
2	2	FIRST GRADE TEACHER	ACTIVE
2	2	CLERK I	ACTIVE
1	0	POLICE OFFICER	ACTIVE
0	4	ADMIN ASSISTANT	ACTIVE
0	1	CRIME INFORMATION SPEC	ACTIVE
0	0	DIRECTOR OF FINANCE	ACTIVE
0	0	DEPUTY	ACTIVE
0	0	PARKING CONTROL OFF	ACTIVE

PDF Output of Data

When outputting data to Excel, the Data & Image option is not available. This allows you to use Excel to build the chart. What does come available is the PivotTable option. When selecting this the data will export and, in another sheet, a PivotTable will be available.

Output Data

Title
Applicants by Job Opening

File Type
 PDF Excel CSV

Pivot Table

Include
 Data Only Data & Image Image Only

Number of Records
 All Output first:

Columns

Un-Select All

Candidate Applicant Count Hiring Manager Job Class

Job Description Job Family Job Identifier

CLOSE OUTPUT

Output Data View from Tyler Hub

The data comes into Excel retaining the value formatting which it had in Hub.

Job Identifier	Job Description	Location	Hiring Manager	Salary From	Salary To	Posting Start	Posting End	Job Family	Job Class	New Applicant Count
25509-1	ST CREW WORKER	PUBLIC WORKS DEPARTMENT	CHRISTINE PALMER	\$27,950.00	\$27,950.00	5/1/2009	12/31/9999	NON UNIFORMED	ST CREW WORKER	1
13526-1	ADMIN CLERK	FINANCE DEPARTMENT	TIMOTHY JONES	\$24,080.00	\$24,080.00	1/1/2009	12/31/2022	CLERICAL	CLERK I	4
804040-1	FIRST GRADE TEACHER	ELEMENTARY SCHOOL 1		\$27,735.00	\$78,582.50	4/18/2016	4/21/9999	TEACHER	TEACHER ELEMENTARY SCHOOL	2
13518-1	CLERK I	FINANCE DEPARTMENT		\$22,400.00	\$22,400.00	1/1/2006	12/31/2020	ADMINISTRATION	CLERK I	2
21014-1	POLICE OFFICER	POLICE DEPARTMENT		\$0.00	\$66,650.00	6/1/2009	12/31/9999	UNIFORMED	OFFICER	0
13519-1	ADMIN ASSISTANT	FINANCE DEPARTMENT	JEAN JONES	\$22,400.00	\$22,400.00	1/30/2007	1/1/2020		CLERK I	4
12444-1	CRIME INFORMATION SPEC	POLICE DEPARTMENT	JEAN JONES	\$0.00	\$60,200.00	1/1/2008	2/10/2020		OFFICER	1
804041-1	DIRECTOR OF FINANCE	FINANCE DEPARTMENT		\$35,800.00	\$61,200.00		12/31/9999		DIRECTOR OF FINANCE	0
21017-1	DEPUTY	POLICE DEPARTMENT	JAMES DEAKIN	\$0.00	\$71,648.75	4/1/2016	12/31/9999	UNIFORMED	OFFICER	0
21028-1	PARKING CONTROL OFF	POLICE DEPARTMENT		\$27,090.00	\$27,090.00	4/30/2008	12/31/2020	UNIFORMED	PARKING CONTROL OFFICER	0

Data Export from Tyler Hub

On the second tab in the workbook, the PivotTable is available for analysis.

Row Labels	Total
CLERK I	68880
ADMIN ASSISTANT	22400
ADMIN CLERK	24080
CLERK I	22400
DIRECTOR OF FINANCE	61200
DIRECTOR OF FINANCE	61200
OFFICER	198498.75
CRIME INFORMATION SPEC	60200
DEPUTY	71648.75
POLICE OFFICER	66650
PARKING CONTROL OFFICER	27090
PARKING CONTROL OFF	27090
ST CREW WORKER	27950
ST CREW WORKER	27950
TEACHER ELEMENTARY SCHOOL	78582.5
FIRST GRADE TEACHER	78582.5
Grand Total	462201.25

PivotTable Fields

Choose fields to add to report:

Search

- Job Identifier
- Job Description
- Location
- Hiring Manager
- Salary From
- Salary To
- Posting Start
- Posting End
- Job Family
- Job Class

Drag fields between areas below:

FILTERS	COLUMNS

ROWS	VALUES
Job Class	Sum of Salary To
Job Description	

PivotTable from Data Export

OTHER TYLER APPLICATIONS

Tyler Hub goes beyond Munis. The Global Search is configured to search all linked Tyler Applications. In 2020.1 a good example is the Hub interact and Global Search feature for Tyler Content Management (TCM).

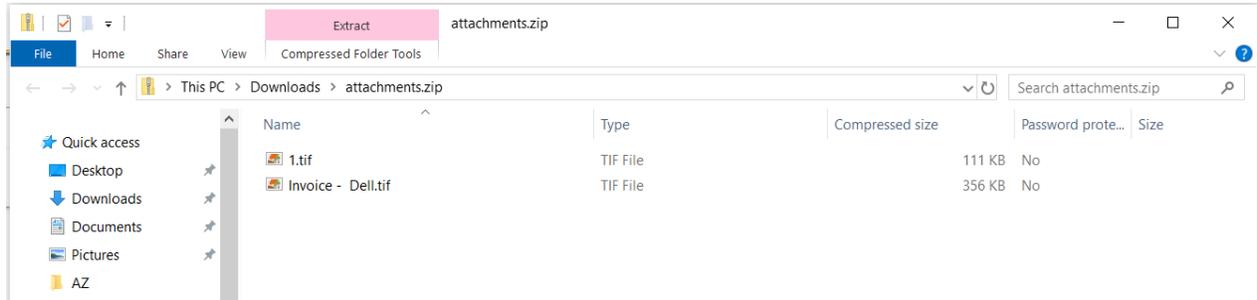


Global Search

By Searching for Dell in the Omni Bar’s Global Search, we can search Munis as we have in the past, but what opens with the addition of TCM information is the Documents tab. Clicking the Documents tab will allow documents tied to the search “dell” to show up in the display. The select all results will allow the files to be emailed or downloaded into a single folder. This is incredibly helpful when compiling the total relationship with a vendor, customer, or employee.

TCM Documents Listings in Global Search

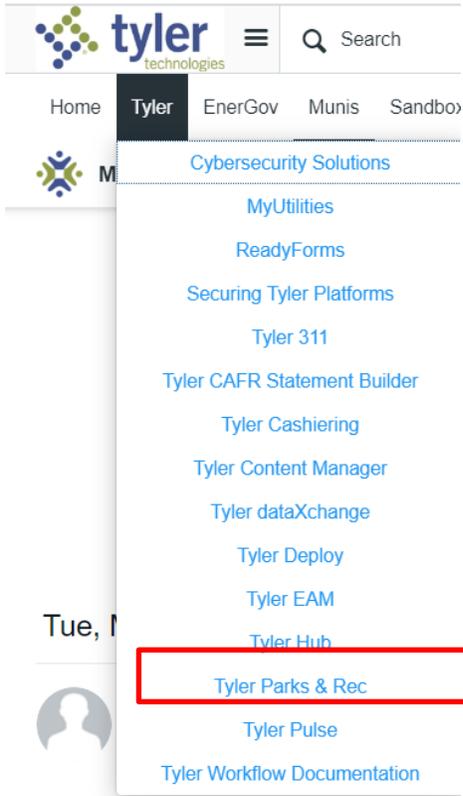
The files are downloaded into a .zip folder. This will allow for compressed sharing of documents if the entire contents need to be emailed.



Downloaded TCM Images

WHAT'S NEXT

Tyler Hub is continually enhanced. As more clients, products, and content are added, look for more useable features of your Tyler starting point. Since its launch in 2018, more simple content modification, content publishing, and program integrations have been added. With each version of Hub, there are release documents posted to Tyler Community. Join the Tyler Hub group in Tyler Community for information about new features and administration guides. To request access, select Tyler Hub from the drop-down list on Tyler Community from the Tyler menu and click Request Membership.



Tyler Product Group List on Tyler Community

On Tyler Community, in the Tyler Hub group, look for Major Enhancements and User Guides from the version you have upgraded from, to the version you are upgrading to, this will give you all information regarding features and changes for your upgrade.