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Tyler Dashboard User Guide Version 5.1
**Objective**
This document provides step-by-step instructions on using the Tyler Dashboard. It is intended for every user that uses the Tyler Dashboard. The document includes information about logging in for the first time, setting up your Dashboard, an overview of how Dashboard works, and customizing the Dashboard.

**Overview**
The Tyler Dashboard is a Web-based tool that allows users to launch all Munis programs and other applications from a single work area. Tyler Dashboard was built using Microsoft® SharePoint® Foundation 2010. It is customizable using applets called Web parts. These Web parts can be added to the Dashboard by an individual for personal access, or by a system administrator for everyone to access. The Tyler Dashboard simplifies sharing information, viewing critical Munis data, and accessing daily work.

**Prerequisites**
Before you can successfully use this feature, the Munis system administrator must ensure that roles that grant appropriate access are assigned to users. If roles are not set up, or not set up correctly, you may need to contact your Munis system administrator or department manager to have the roles updated or added into the Munis system.
- User is a member of Active Directory.
- User exists in Munis.
- User is assigned a role that grants access to the appropriate Web parts.
Dashboard Setup

Set the Tyler Dashboard as Your Home Page

One option for quickly navigating to the Tyler Dashboard is to set it as your homepage in Microsoft® Internet Explorer®.

To set the Tyler Dashboard as your home page:

1. Open Internet Explorer.

2. Navigate to your Dashboard site.
   **Note:** If you are not sure of the Web address, contact your network administrator.

3. Click **Internet Options** on the Internet Explorer Tools menu. The Internet Options window opens.

4. Click **Use Current** to set your Tyler Dashboard as your home page.

5. Click **OK**.
Create a Shortcut to Dashboard on Your Desktop

Creating a shortcut on your desktop is another method that allows you to quickly open the Dashboard.

To create a desktop shortcut for the Dashboard:
1. Open Internet Explorer.
2. Navigate to your Dashboard site. 
   **Note:** If you are not sure of the Web address, contact your network administrator.
3. On the Internet Explorer File menu click **Send > Shortcut to Desktop**.

4. [Image of Internet Explorer showing the File menu with Shortcut to Desktop selected]

Logging In

Due to Active Server Directory, you do not need to login to the Tyler Dashboard.
Parts of the Dashboard Window

The Dashboard window is made up of four main parts: the Tyler Dashboard Toolbar, the user menu, the My Programs panel, and Web parts. This is an example of the Tyler Dashboard with Web parts already added. Your Dashboard may look different if Web parts have not yet been added.

**Tyler Dashboard Ribbon:** This ribbon allows you to add views, update your user settings, manage Web parts, and access the Tyler Menu.

**User Menu:** The User Menu allows you to switch users and to personalize the Dashboard.

**My Programs:** The My Programs tab allows you to manage shortcuts to Tyler programs, as well as internet shortcuts. This panel is available on most Dashboard screens.

**Menu:** The Menu tab on the navigation panel allows you to access Tyler application programs and Web parts. You can add program favorites to your My Favorites Web part or the Programs tab, you can launch a program from this tab, or you can add a Web part to your Dashboard.

**Search:** The Search tab allows you to search the Munis Central Programs for records. You can search Employee Central, Customer Central, Vendor Central, or Property Central. When records are found, you can launch the associated program by clicking on the record.

**Web Parts:** The Web Parts section allows you to add web-based portals that display information from different parts of Munis and other web-based tools.
Run Tyler Programs As

You have the ability to choose how to run Munis programs. The two choices are Thin Client Program and Web Version Program. The Thin Client Program (GDC) – Power Users option opens the standard Munis programs. The Web Version Program (GWC) option opens a Web-based Munis program using Microsoft® Silverlight™.

To change how you run Munis programs:

1. Click **My Profile** on the Tyler Dashboard toolbar.

2. Select **Thin Client Version** or **Web Version Program**.

3. Click **OK**.

4. Click **Home** on the Dashboard ribbon to return to your home tab.
Apply a Template to Your Dashboard

System Administrators can create templates based on users’ job descriptions. By applying one or more templates, you can quickly customize your Dashboard.

To apply a template:

1. Click the **User Menu** in the upper right of the screen.

2. Select **Apply Template**. The program displays the Apply a Template screen.

3. Select the template or templates that you want to apply.

   **Note:** Applying multiple templates does not create duplicate entries if the templates share similar features.
4. To view the contents of the template before applying, click the **VIEW** button.

5. Click on the headings to expand the items.

6. Click the **OK** button when done.

7. Click the **Apply** button for the template you want to apply.

8. Click the **Home** button return to your Dashboard.
The Navigation Panel
The Navigation Panel, located on the left side of the screen, provides access to the Munis Menu, shortcuts added to the Programs tab, and a Search feature that provides quick access to Central program records.

Accessing the Munis Menu
The Munis Menu is easily accessed and searched on the Navigation Panel.

To access the menu:
1. Click the **Menu** tab on the Navigation Panel.

2. Optional: Type the program name in the Enter Your Search Criteria Here field.

3. Click the module level and corresponding levels to expand the menu.

4. Click a program name to open the program.
   
   **Note:** If you are using the Thin Client Program (GDC), the program prompts you to install the FourJ's® ActiveX client the first time that you access a program.

5. Click **Install** to install the ActiveX.
   When the install is complete, the Munis program opens in a new screen.
**Programs**

The Programs tab allows you to manage frequently used programs and Website links that are available regardless of which Dashboard tab you are viewing. You can hide the Programs panel to see more of the main screen.

**Hide or Display the My Programs Panel**

**To hide or display the My Programs panel:**

1. To hide the My Programs panel, click on the **Left Arrow**.

2. To display the My Programs panel, click the **Right Arrow**.

**Add a Munis Program to Programs**

**To add a Munis menu program to the Programs tab:**

1. Click the **Menu** tab on the Navigation Panel.

2. Optional: Type the program name in the **Enter Your Search Criteria Here** field.

3. Click the module level and corresponding levels to expand the menu.

4. Right-click a program name.

5. Click **Add to My Programs**.
Add a Website to Programs

To add a Website to the Programs panel:
1. Click Add a Favorite at the top of the Programs tab.

2. In the Category field, enter a category or choose a category from the list.
   Note: You can create personalized categories by typing a category name. Once you have added the category, it is available on the list for future use.

3. In the Name field, enter the name that you want to display in the Programs panel.

4. In the URL field, enter the URL to the Website.
   Note: You must include the HTTP://.

5. Check Open in a New Window if the Website should open in a new window.

6. Click the OK button.
   The Website is now available in your My Programs panel.
Delete Programs

1. Hover your mouse over the item that you want to delete. Note: If you delete a category, all items in the category will also be deleted.

2. Click the Edit button.

3. Click Delete.
   The favorite is no longer available in your Programs tab.

Reorder Programs and URL’s

You can reorder the categories, programs and url’s listed in the Program’s tab by clicking and dragging them to the new location.

To reorder programs and url’s:

1. Click and drag the category, program or url to the new order.
   Note: When you are dragging the item, the mouse pointer turns into a hand with a stop icon.

2. Release the item when the mouse pointer turns to an arrow with a black up and down arrow icon.
Search Central Records

The Search tab allows you to search for records in Employee Central, Customer Central, Vendor Central, or Property Central. Once the record is found, you can click on the record and open the corresponding Central program directly to the information you need to see.

To Search Central Records:

1. Click the **Search** tab on the Navigation Panel.

2. Enter the first few letters of the menu program or Web part that you are searching for in the search field. **Note:** You can use an * as a wildcard character.

3. Click the **Start This Search** button.

4. Click the arrow to the left of the item to display the search results.

5. Click on the record to open the corresponding Central program.
Web Parts
Web parts are Web-based portals that display information from different parts of Munis and other Web-based tools, such as SRS Reports. There are many Munis Web parts available with the Dashboard. The Web parts that are available to you are based on your Munis role permissions. The Available Web Parts documents on the Munis KnowledgeBase describe each Web part by Munis version.

Add Web Parts to the Tyler Dashboard
Web parts are applets that provide access to information in Munis or other Tyler applications. For example, the My Workflow web part displays information on the number of pending approvals.

To add a Web part to your Dashboard:

1. Click the Settings button on the Dashboard ribbon. The program displays the Dashboard Settings popup window.

2. Select Munis from the Available Tenants field.

3. Click the application under Munis Web Parts to access the available web parts for the module.
4. Click and drag the web part the Header, Left or Right section of the Web Part Work Area or click the web part that you want to add. The Web Part now displays in the Web Part Work Area in the Header section.

5. Click and drag the web parts to the desired display location and order in the Web Part Work Area.

6. Click the Save button to save the web parts and positions. The Web parts display on your Dashboard.

**Closing Web Parts**

**To close a Web part:**

- Click Close on the menu on the title bar of the Web part that you are closing. The Web part is removed from your Dashboard.
My Workflow Web Part
The My Workflow Web part lists Munis Workflow notifications and approvals, as well as alerts generated from within Munis. Each category displays the total number of records available, as well as a count of any new, non-viewed records.
Notifications
To dismiss a notification:

1. Click on the Notification button to view a list of notifications. **Note:** You may need to click the Next button on the Navigation bar at the bottom of the panel to see more notifications.

2. Click the Actions button to the left of the notification you want to review. **Note:** More Info is not available for every notification. If there is no corresponding Munis program to the notification, it is not available.

3. Click View Details to view detailed information about the notification. The program displays a panel with details about the notification.
4. Click the **Dismiss** button, or select **Dismiss** from the Actions menu to dismiss the notification.

5. Click **More Info** to view the Munis program associated with the notification. **Note:** More Info is not available for every notification. If there is no corresponding Munis program to the notification, it is not available.

6. You can update multiple actions at once by selecting the check box for each item you want to update. **Note:** You can select the check box in the header row to select all of the items at once.

7. Click the **Dismiss** button.
Approvals
To approve an item:

1. To view Approvals, click on the **Approval** button. The Web part displays a list of items available for approval.

2. Click the **Actions** button the item that you want to approve. The Web part displays a list of the actions available for the item.
3. To view detailed information, select **View Details**. The Web part displays a panel with information about the approval item.

![Image of Web part displaying approval details]

4. Click the **Accept**, **Reject**, **Forward**, or **Hold** button to approve, reject, forward, or hold the approval item. The program displays the Required Comment box.

![Image of Required Comment box]

5. Enter a comment in the box.

6. Click the **Save** button. **Note:** Comments are required for all actions except Accept.

7. Click **More Into** to view the Munis program associated with the approval item.

8. You can update multiple item by selecting the check boxes for the items that you want to update.
You can select the check box in the header row to select all items.

9. Click the **Accept**, the **Reject**, the **Forward**, or the **Hold** button.

10. Enter a comment in the box.

11. Click the **Save** button.

**Note:** Comments are required for all actions except Accept.
**Alerts**

Alerts are generated in the Munis Program, Alerts, which is available on the System Administration > Alert Administration menu. Alerts can also be created based on business rules. You can dismiss future alerts about the business rule, or you can acknowledge the alert and receive another at a later time.

To manage alerts:

1. Click the **Alert** button 📣 to view a list of available alerts.

2. Click the **Actions** button ⬇️ for the alert that you want to update.
3. To view detailed information, select **View Details**. The Web part displays a panel with details about the alert.

![View Details](image)

4. Click **Dismiss** to stop receiving alerts for the business rule.

5. Select **Accept** to acknowledge that you received the alert and to keep receiving future alerts for the business rule.

6. You can update multiple actions at once by selecting the check boxes for the items that you want to update. You can select the check box in the header row to select all of the items.

![Select All](image)

7. Click **Dismiss** or **Accept**.
My Workflow Web Part Settings

To update the settings on the My Workflow Web part:

1. Click the **Settings** button. The Web part displays the Forwarding and Refresh Rate panels.

2. Select the **Forwarding On** check box on the Forwarding tab to begin forwarding Workflow items.

3. Select the user to forward approval items to from the **Forward To** list.

4. Select the user to forward pre-approval items to from the **Pre-Approver** list.

5. Click the **Save** button.

6. Select the **Refresh Rate** tab to change how often the Web part updates its content.

7. Enter a duration in minutes in the **Refresh Rate** in Minutes box.

8. Click the **Save** button.
Web Part Toolbar
Almost every Web part has its own toolbar. This toolbar allows you to refresh data, reset the Web part to its original settings, adjust the auto timer, and view the Web part in its own screen.

Refresh Control
The refresh icon ![Refresh icon] initiates a data refresh on the Web part.

Auto Timer Control
The auto timer icon ![Auto timer icon] allows you to automatically refresh the data at predetermined intervals. When the auto timer is turned on, the arrow on the clock is green ![Green arrow]. The refresh interval for the auto timer is set to 30 minutes by default. If the auto timer is active, clicking the refresh ![Refresh icon] icon initiates a data refresh and deactivates the auto timer. Also, if the auto timer is active, clicking the active auto timer icon ![Active auto timer icon] initiates a data refresh and deactivates the auto timer. See the Modify the Auto Timer section for information on changing the refresh time.
Detail Viewer Control

The detail viewer icon opens the Web part in a new Dashboard page. This makes it easier to see the data when the Dashboard page gets crowded.

Date and Time Last Updates

When the Web part has been refreshed, a date stamp displays in the toolbar title area showing the date and time of the last update.

Modifying the Auto Timer

Most Web parts have an autotimer to refresh the data. The default time is 30 minutes, but you can modify this setting.

To modify the auto timer:

1. Click the Modify this Web Part icon on the Web part toolbar, or select Edit My Web Part form the menu on the title bar of the Web part.
   This places the Dashboard in edit mode, and displays the Modify This Web Part panel.

2. Type the new refresh rate in minutes in the Auto Update Interval field.

3. Click the OK button.
Modifying a Web Part

Some Web parts require you to enter further information prior to displaying data. If settings need to be established for the Web part, the Web part displays the message “Required parameters have not been defined for this web part.”

To modify the Web part:

1. Click Modify This Web Part icon on the Web part toolbar, or select Edit My Web Part form the menu on the title bar of the Web part. This places the Dashboard in edit mode, and displays the Modify This Web Part panel.

2. To set the Web part parameters, select or enter the necessary information in the Web Part Parameters section.
   Note: The parameters that need to be established are different for each Web part.

3. Select the check boxes in the Grid Columns section to establish which columns display in the Web part.
4. Click the OK button.

**My Favorites Web Part**

The My Favorites Web part designed to store personal favorites on each Tyler Dashboard tab, as opposed to the My Programs list of favorites which is available regardless of which Dashboard tab you are viewing. The links stored in the My Favorites Web part are different from the ones stored in the My Programs panel. Examples of items that can be added to the My Favorites Web part are Munis menu programs, work-related Websites, Munis Web-based programs, such as Munis Self Service, and other favorite Websites. You can view favorites in List View or Tile View.

**List View**

**Tile View**

Add a Munis Menu Program to the My Favorites Web Part

To add a Munis program:

1. Click **Menu** on the Navigation Panel.

2. Navigate to the program you want to add as a favorite.

3. Right-click on the program and select **Add To My Favorites**.
4. Press **F5** on your keyboard to refresh the screen. The selected program is now available in the My Favorites Web part.

![My Favorites Web Part](image)

**Add a Website to My Favorites Web Part**

**To add a Website to your favorites:**

1. Ensure that the Web part is in List View.

2. Click **Add Link** at the bottom of the Web part.
   The Web part displays the Add a New Link fields.

   ![Add a New Link](image)

3. Enter the name of the favorite in the **Name** field.

4. Enter the URL for the Website in the **URL** field.
   **Note:** All URLs **MUST** start with HTTP:// regardless of the Website.

5. Select **Open in a New Window** or **Open in Same Window**.

6. Click **OK**.
   The Website is now available in the My Favorites web part.

**Deleting Favorites from My Favorites Web Part**

**To delete a favorite:**

1. Ensure that the Web part is in List View.

2. Click the **Delete** button ✗ for the favorite you want to delete.
   The favorite is removed from the Web part.
Views
A view is a page within the Dashboard site. Views help you organize Web parts and favorites by job function or role. See the Adding Web Parts section in this document for more information on adding web parts to a view.

Add a View

To add a View:

1. Click Add View in the upper left corner of the screen.

2. In the Name field, enter a name for the view, such as Personnel.

3. Select an icon for the View.

4. Click the OK button twice, once on the View Maintenance screen and once on the Confirmation screen.

5. Click the Close button on the View Maintenance screen. The view is now available on your Dashboard.
6. To open the added view, click the name of the view.

Manage Views

To manage Views:
1. Click Order Views in the upper left corner of the screen.

2. To adjust the order of the views, click on a View and drag it to the desired order.

3. To delete a view, click on the Delete button.

4. Click the OK button.
Clear Your Dashboard of All User-Added Content

The Tyler Dashboard allows you to remove all user-added content in one-step. This process removes every item that you have added to your Dashboard or have added through applying a template. This includes all Web parts, tabs, and favorites on the My Programs panel. It does not remove any Web parts added by your system administrator as shared Web parts.

To clear your Dashboard:

1. Click on your name in the upper right of the screen.

![Screen capture showing the user's name and options]

2. **Select Clear User-Added Dashboard Content.** The program displays a confirmation message.

   ![Confirmation message for clearing user-added dashboard content]

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

   **Save**

3. Click **Save** to remove all user-added content. The program displays a confirmation message.

4. Click **OK** on the confirmation message and **OK** on the success message.

5. Click the **Home** view in the upper left of the screen to return to your Dashboard.