

TYLER HUB
End User Guide

Version 2018.5



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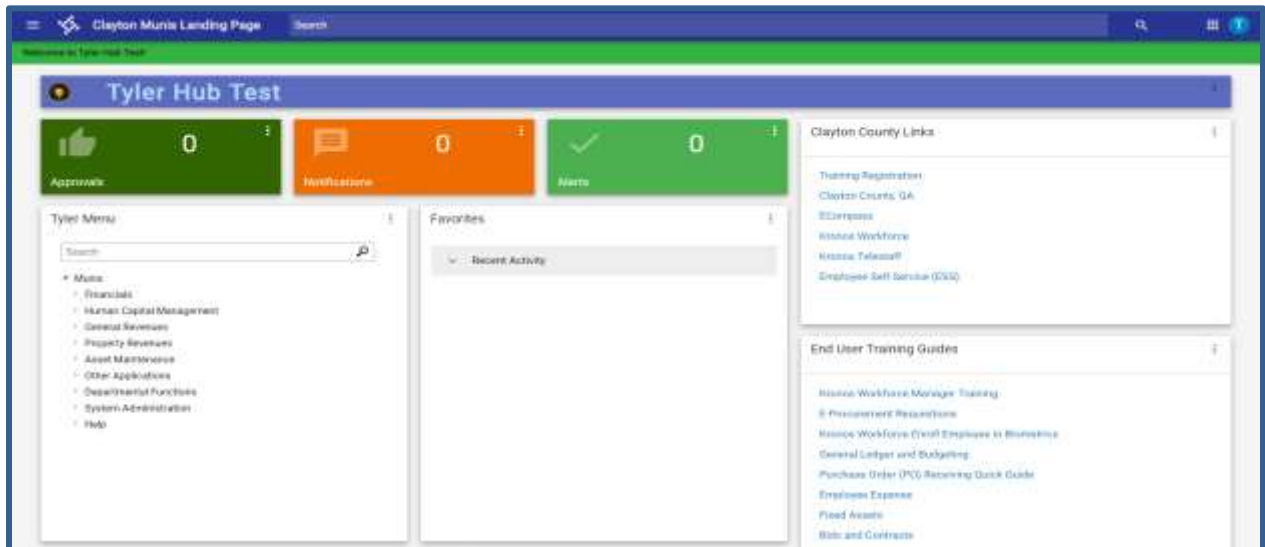
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INTRODUCTION

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

Notably, Tyler Hub provides:

- Collections of informational and analytic cards
- The ability to mesh applications across divisional boundaries
- Access to the **Tyler Menu** and **Tyler University**
- Modern visualizations and a chart library
- Page and card templates and builders for efficient onboarding



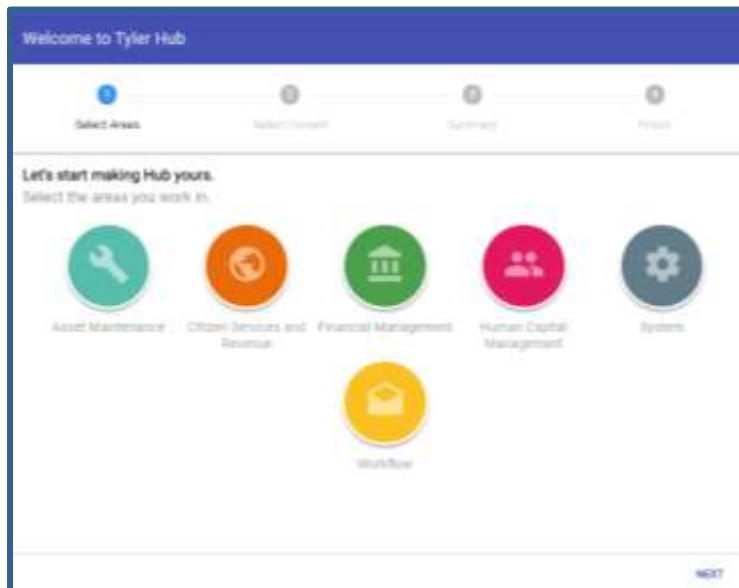
To access the Tyler Hub “Test” site, open the following link in your web browser:

<https://tylerhubtest.claytoncountyga.gov>

Your login credentials to Tyler Hub is your County email address and password.

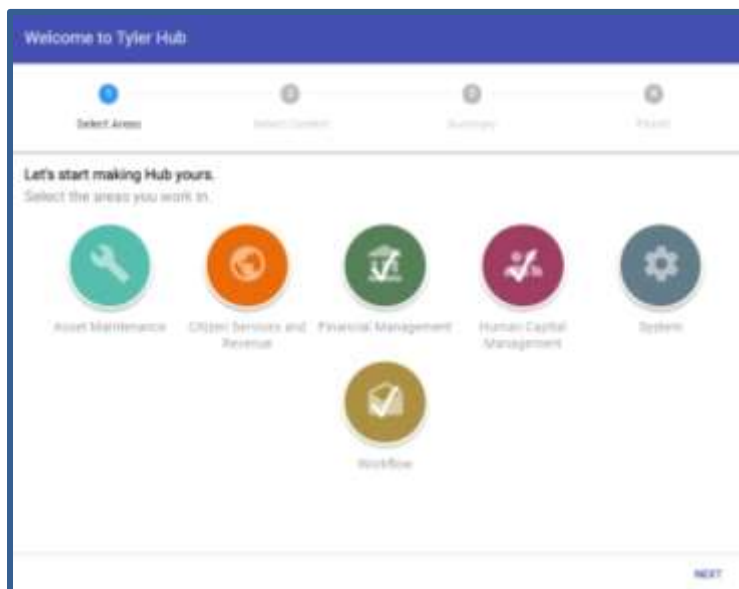
ONBOARDING

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 onboarding process.



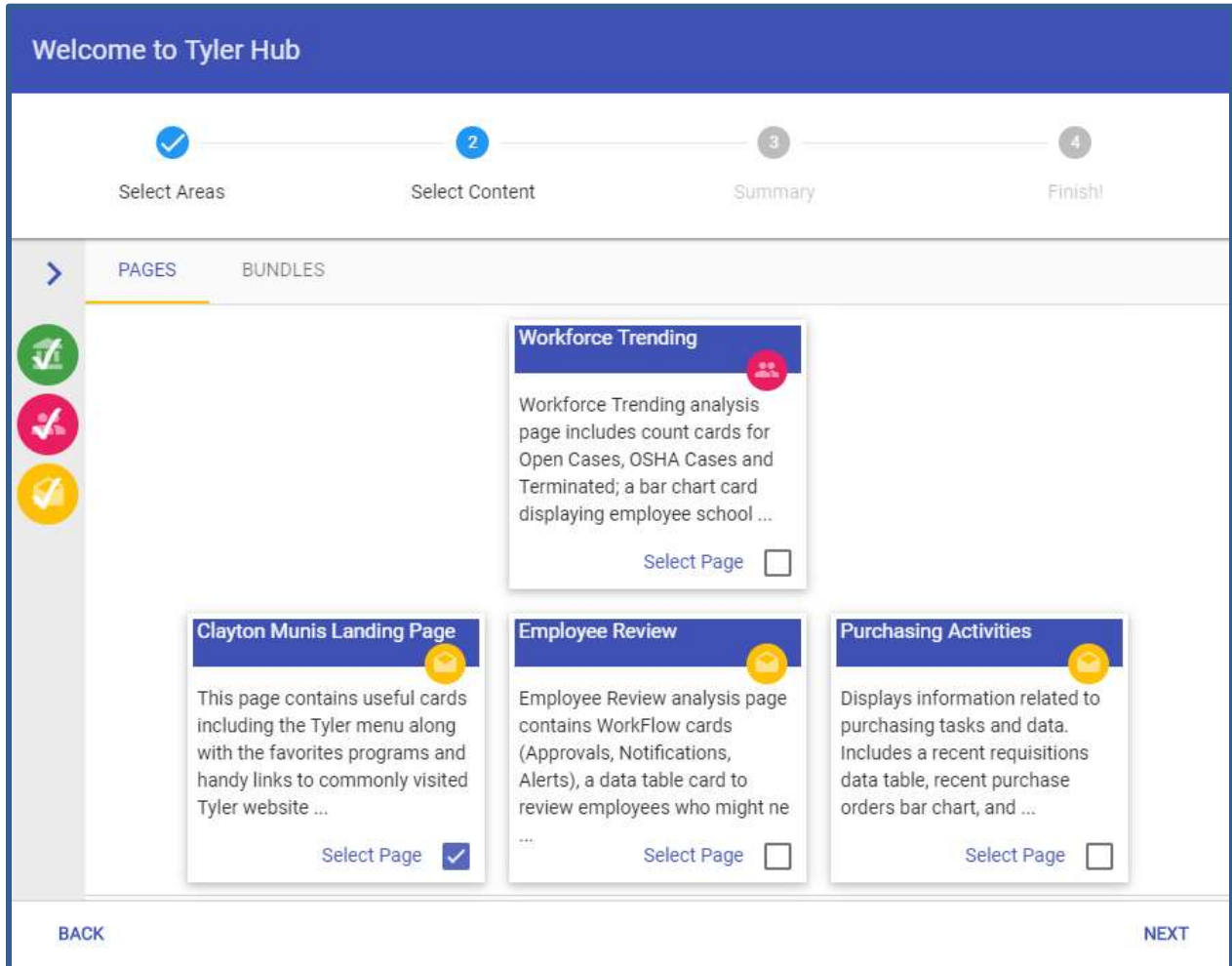
To complete the onboarding process:

1. Click the icons to choose the areas in which you work, and the system displays a checkmark for each selected area. Options vary based on the modules your organization uses.



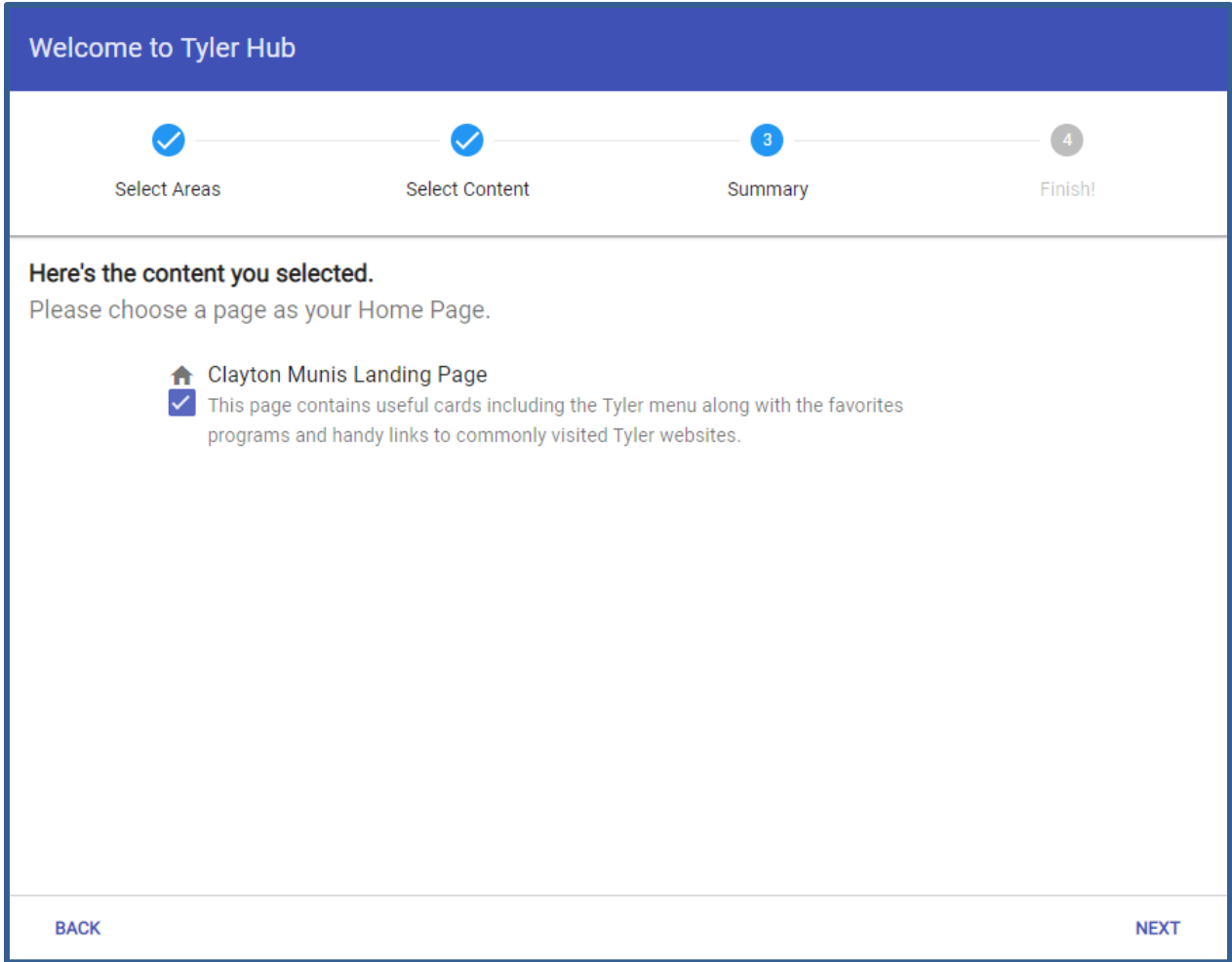
2. Click Next.

The program advances to the next phase of the process, where you can choose the pages to add to Tyler Hub. It is recommended to select at least the **Clayton Munis Landing Page**.

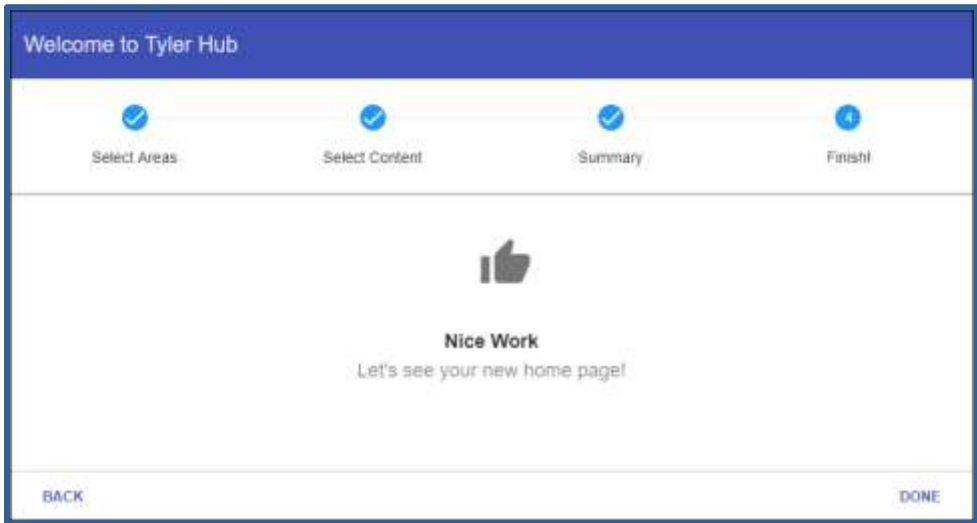


3. Select the check box for each page or content bundle to include. Content bundles are groups of pages with a similar theme.

4. Click Next to advance to the Summary screen, where you can choose your Home page. It is recommended to choose the **Clayton Munis Landing Page** as your **Home page**.

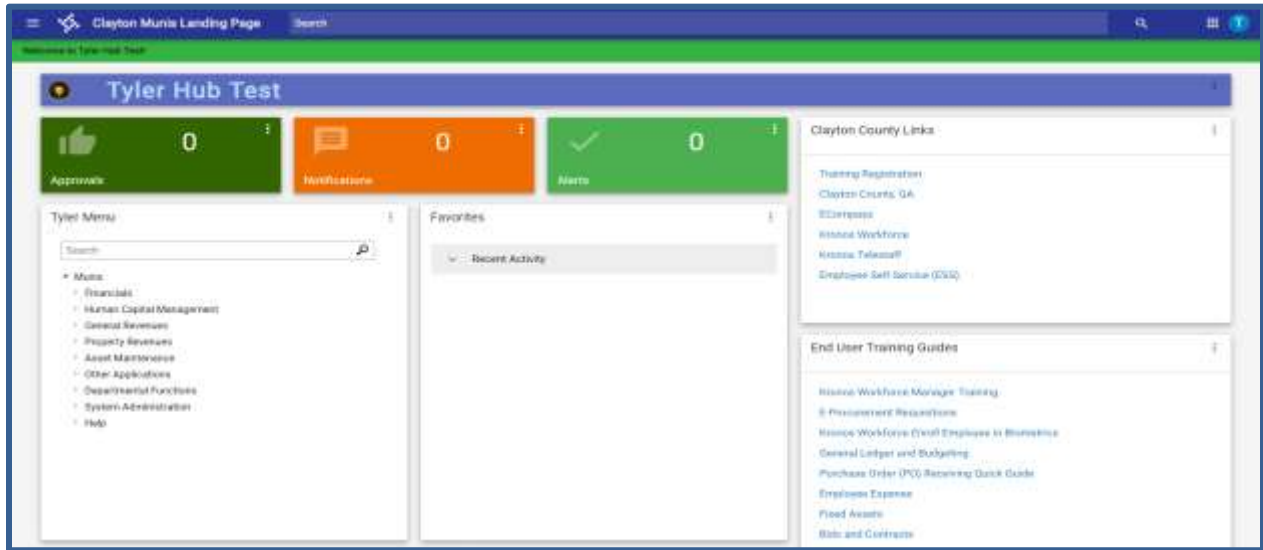


5. Click **Next** to advance to the final screen.



6. Click **Done** to complete the onboarding process.

The program generates the Home page and displays it. In this example, the **Clayton Munis Landing Page** is shown as the Home page.



OMNIBAR

The program displays the **Omnibar** across the top of the screen. The Omnibar is on every page and features the Menu button, Tyler logo, page name, search box, Apps button, and user information option.



Menu

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



When you click this option, the system displays the **Pages** and **Manage Content** groups. From this menu, you can access all the pages you have added.



Refer to the [Pages](#), and [Manage Content](#) sections for more information on these topics.

Tyler Logo and Page Name

When you click the Tyler logo or page name for any page, the screen refreshes to display your Home page.

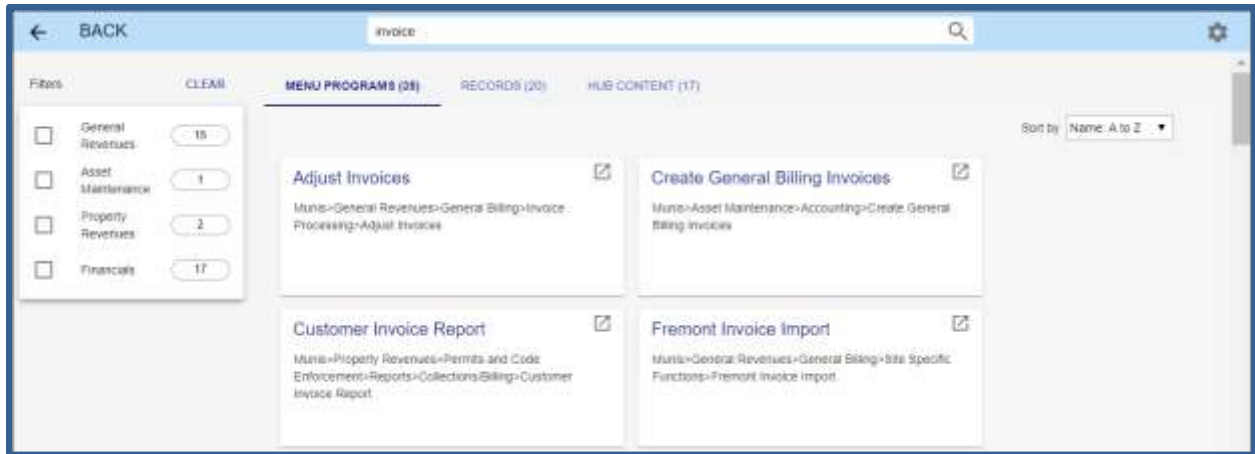


Search Box

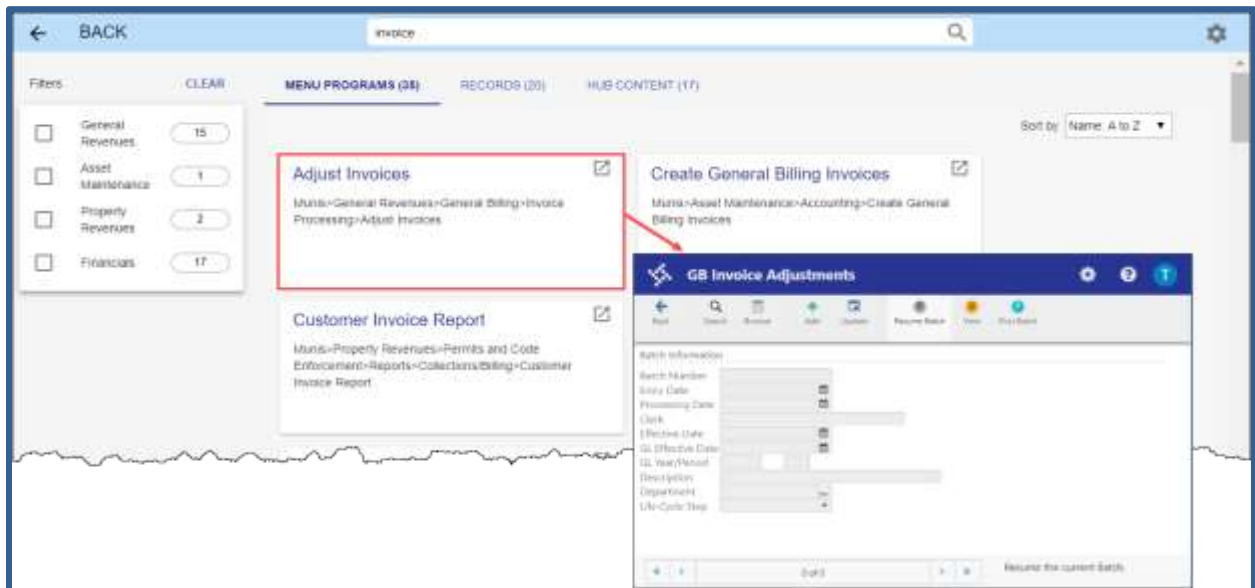
The search box allows you to enter criteria and search Tyler Hub for relevant information.



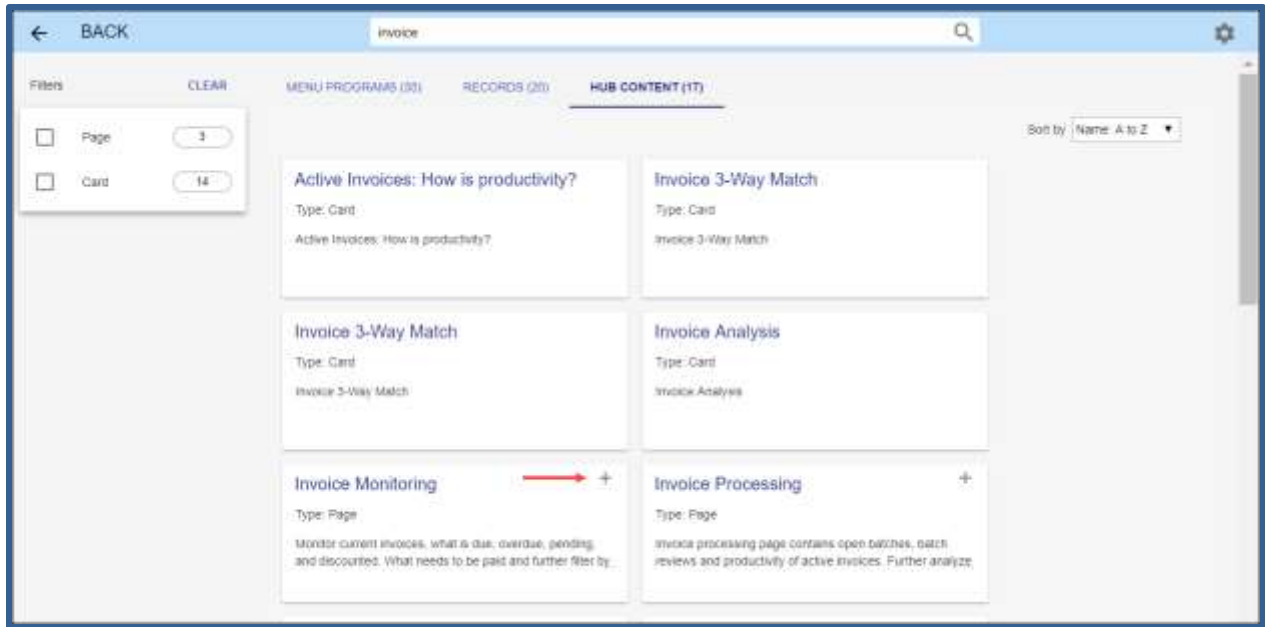
When you enter search criteria, the program displays applicable results from menu programs, records, and Tyler Hub content.



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



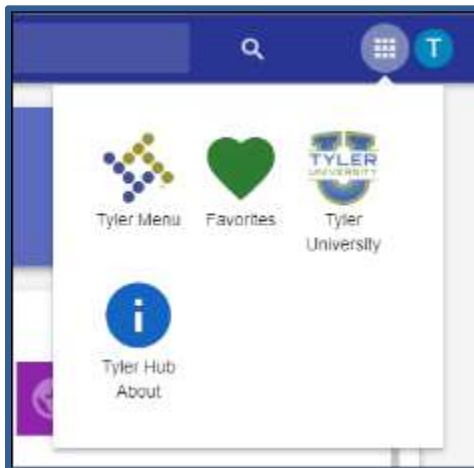
For results in the **Hub Content** tab, click the Add button (+) to add that item. The button is only available on content you have not already added.



Refer to the [Pages](#) and [Cards](#) sections for more information on those topics.

Apps

The Apps button is available in the Omnibar.



When you click the Apps button, Tyler Hub displays the **Tyler Menu**, **Favorites**, **Tyler University**, and **Tyler Hub About** options.

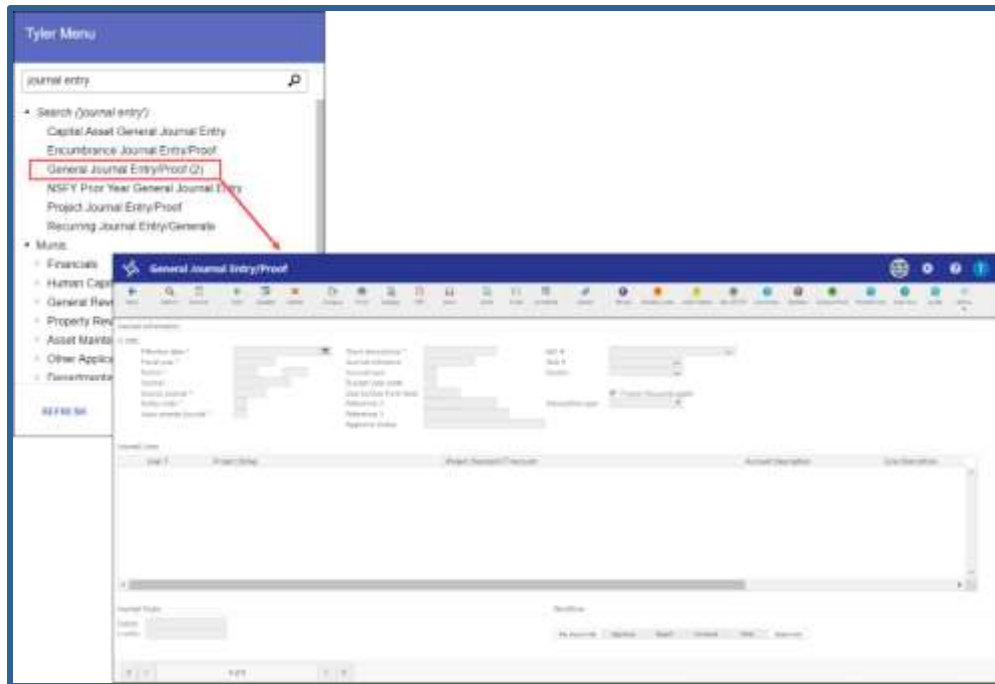
Note: Depending on your configuration settings, your system may display additional options.

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.

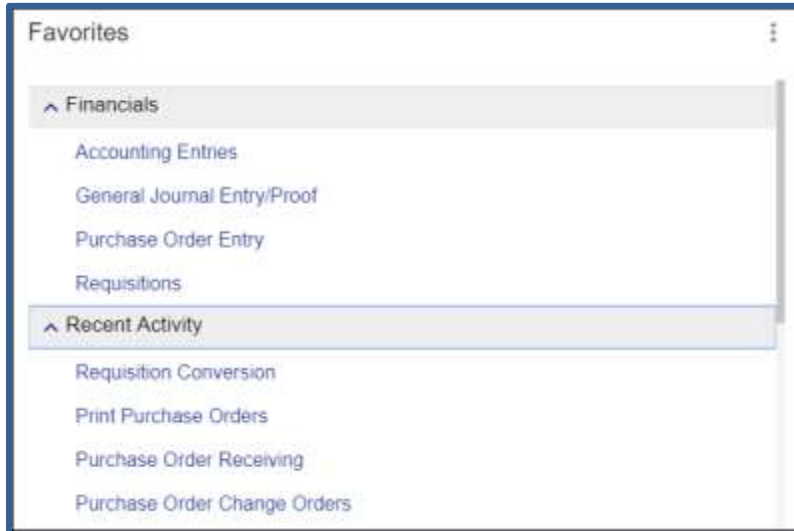


When you enter search criteria, the system produces a list of appropriate programs. Select an option to open that program in Munis.



Favorites

The Favorites option alphabetically lists programs and categories you have added to your Favorites menu. It also provides your 10 most recently accessed programs in the Recent Activity group, in the order in which you most recently opened them.



Adding a Category

Categories group similar programs or websites. For example, a Reports category may be used to group all the reports you frequently use.

To add a category:

1. Click the Apps button.
2. Click Favorites to display the Favorites menu.
3. Click Edit to display the Edit Favorites menu.
4. Click Add Category.
The system displays the Add Category dialog box.
5. Enter the name of the category in the Name field.
6. Click Save.
7. Click Done to exit the Edit Favorites menu.
8. Click Close to exit the Favorites menu.

Adding a Favorite

The Favorites menu can include different types of favorites, such as programs and websites.

To add a favorite program from the Tyler Menu:

1. Click the Apps button.
2. Click Tyler Menu.
3. Type program name into the search box or navigate to program name from the menu.
4. Right-click the program name.
5. Select Add Favorite. The program is added to your favorites under the default category name for that program.

To add a website to your Favorites menu:

1. Click the Apps button.
2. Click Favorites to display the Favorites menu.
3. Click Edit to display the Edit Favorites menu.
4. Click the Add button beside the category to which the favorite should be added. The system displays the Add Favorite dialog box.
5. Enter the name of the website in the Name field. This is the name that will be displayed in your Favorites list.
6. Enter the URL for the website in the Executable/URL field.
7. Click Save to add the entry to your Favorites menu.
8. Click Done to exit the Edit Favorites menu.
9. Click Close to exit the Favorites menu.

Editing a Favorite or Category

To edit a favorite or category:

1. Click the Apps button.
2. Click Favorites to display the Favorites menu.
3. Click Edit to display the Edit Favorites menu.
4. Click the entry to update. The program displays the Edit Favorites dialog box.
5. Update the available fields, such as the Category, Name, and Executable/URL fields.
6. Click Save.
7. Click Done to exit the Edit Favorites dialog box.
8. Click Close to exit the Favorites menu.

Deleting a Favorite or Category

To delete a favorite or category:

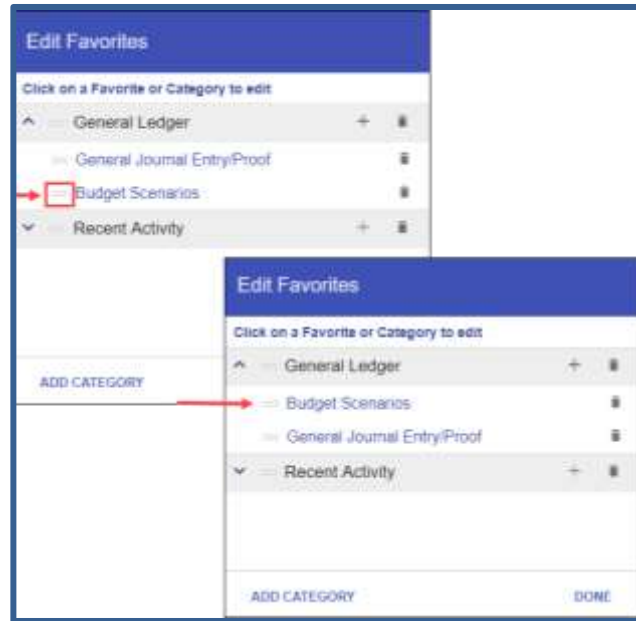
1. Click the Apps button.
2. Click Favorites to display the Favorites menu.
3. Click Edit to display the Edit Favorites menu.
4. Click the entry to delete.
The program displays the Edit Favorites dialog box.
5. Click the Delete button beside the favorite to be deleted.
The program displays a confirmation message.
6. Click Delete to remove the entry from the Favorites menu.

Note: If you delete a category, all favorites in that category are also removed from the Favorites menu.

7. Click Done to exit the Edit Favorites menu.
Click Close to exit the Favorites menu.

Reordering Favorites or Categories

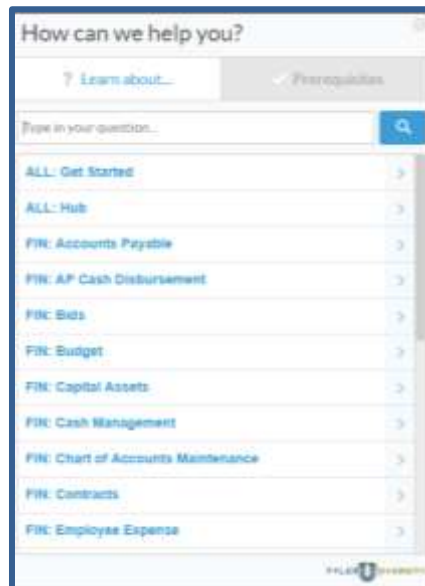
To change the order of favorites and categories, click the Move button and drag the item to a new location.



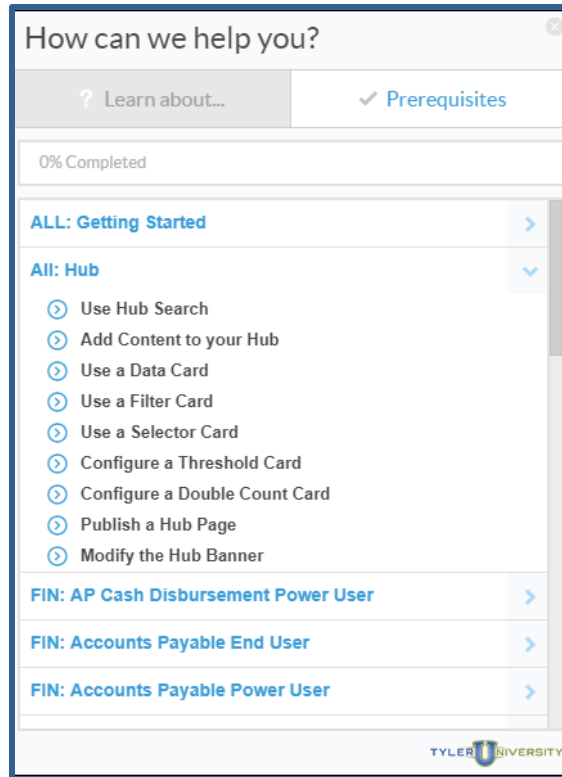
Tyler University

The **Tyler University** option provides access to Tyler University courses. The courses are organized into 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.



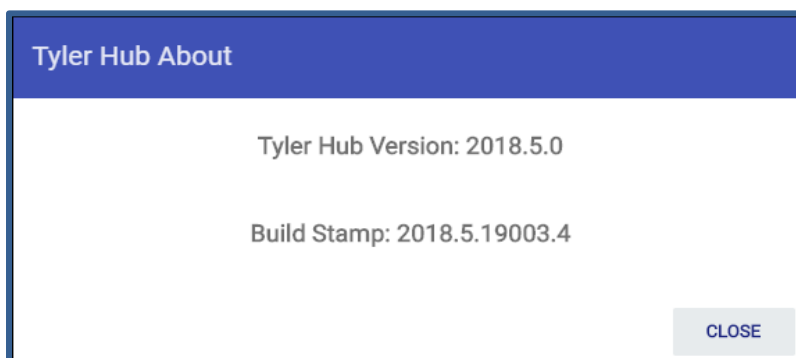
To take a course in Tyler University:

1. Click the Apps button.
2. Click Tyler University.
3. Select the appropriate tab, depending on whether the course is required or not. If you are required to complete the course, click Prerequisites. Otherwise, click the **Learn About** tab.
4. Select the course from the list of available options to start the course.

Note: Items with the bubble icon  assists you with entering items into the system. Items with the player icon  are actual video tutorials, and will not enter anything into the system.

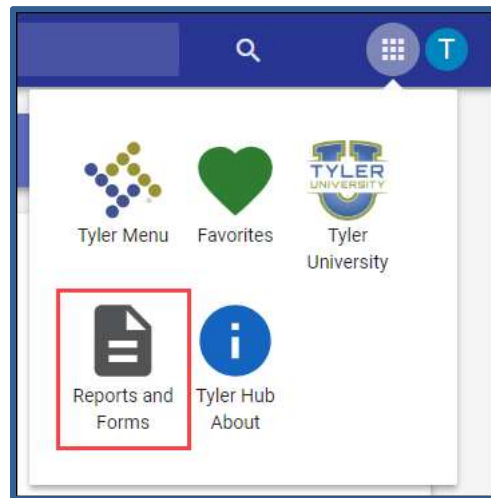
Tyler Hub About

The Tyler Hub About option provides information about the installed version of Tyler Hub as well as the build stamp associated with it.

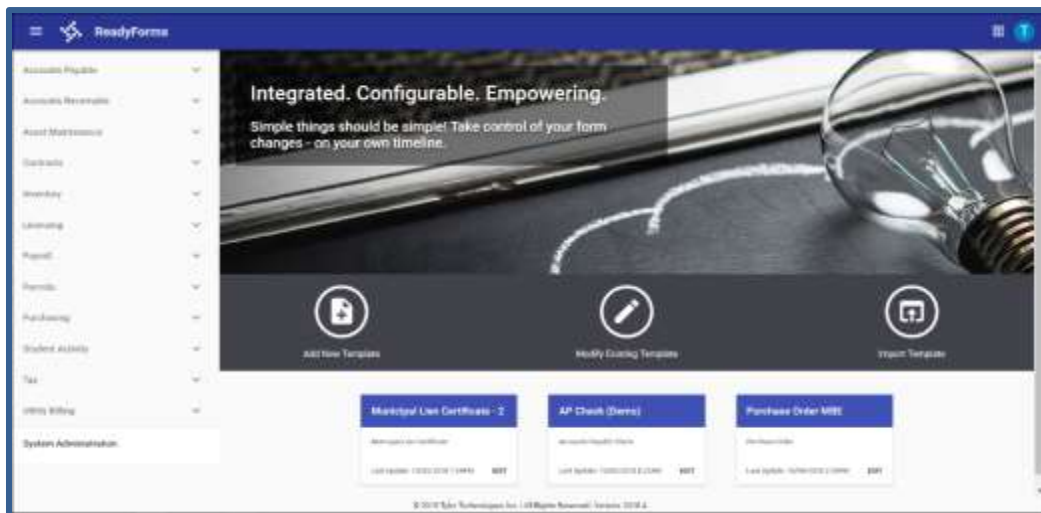


Reports and Forms (Optional)

The Reports and Forms option is available only if your organization has integrated Tyler ReadyForms functionality.



This option provides access to the ReadyForms application in which your organization can configure form templates.

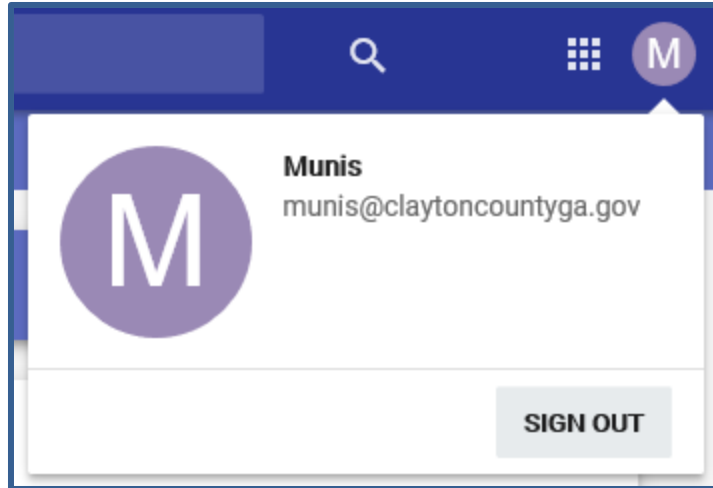


USER INFO

The User Info button is available on the right side 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.

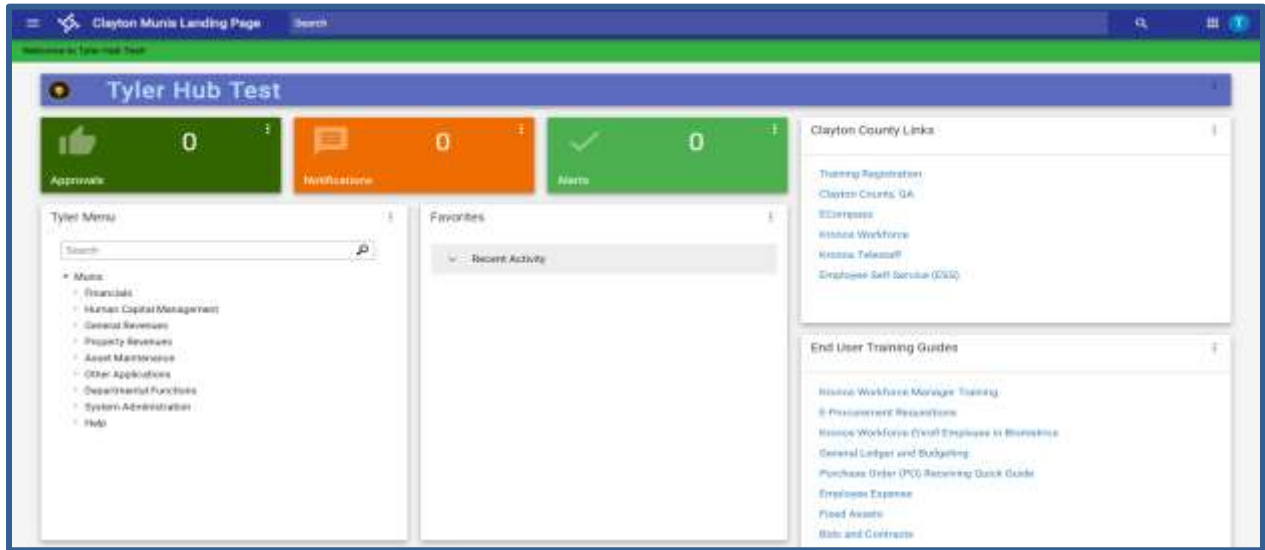


If you sign out of Tyler Hub, you must enter a valid Tyler Identity username and password to sign in again. Your username is your county email address and password.

A screenshot of the Tyler Identity sign-in page. The page has a light grey background. At the top center is the Tyler Identity logo, which consists of a cluster of blue and green dots followed by the text 'tyler identity' in blue and 'a total tyler solution' in green. Below the logo is the tagline 'Identify. Authenticate. Empower.' in a dark grey font. The main content is a white sign-in box with a blue border. Inside the box, the text 'Sign in to your account' is centered. Below this text are two input fields: 'Username' with the placeholder text 'firstname.lastname@claytoncountyga.gov' and 'Password' with a series of black dots. Below the password field is a checkbox labeled 'Remember me'. At the bottom right of the sign-in box is a blue button with the text 'SIGN IN' in white.

HOME PAGE

The Home page provides convenient access to some of the cards you use most often. It is highly customizable to suit your individual needs.



You can set any existing page you have installed as the Home page in the Edit Pages dialog box. It is recommended to set the **Clayton Munis Landing Page** as your Home page for faster access to your Munis programs.

Available pages vary depending on the products and solutions with which Tyler Hub is configured. This section explores some common Home page offerings.

BANNER CARD

If enabled, the system displays the banner card across the top of the Home page. This card is identical on all users' Home pages. It is only visible on the Home page.



ENVIRONMENT BANNER CARD

The environment banner card displays environment-specific information, such as whether you are using Tyler Hub Live, Test, or Train environment. The banner is visible on every page for all users.



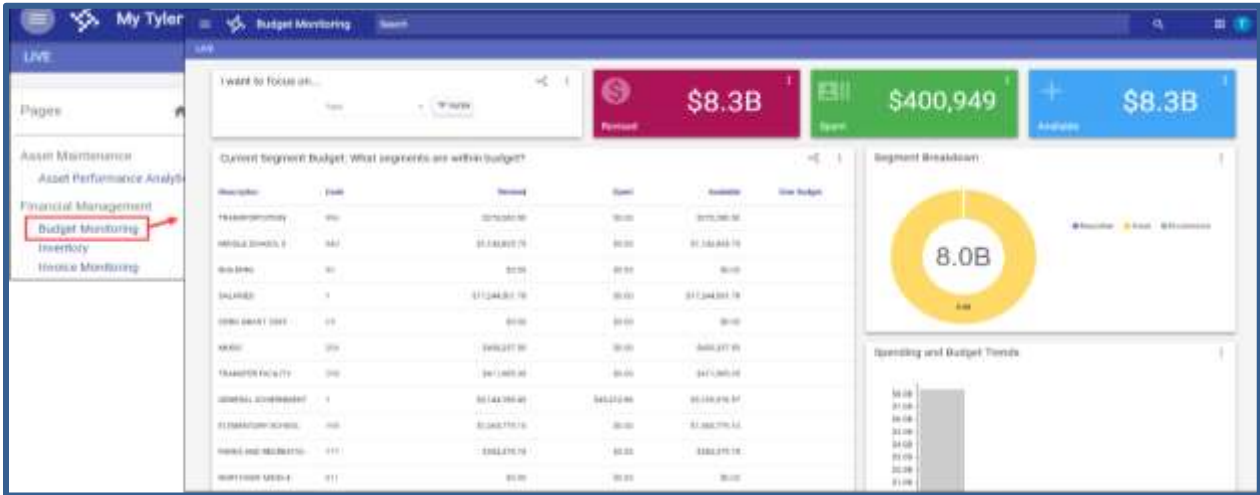
PAGES

The **Pages** group of the menu features links to all the pages you have added to your Tyler Hub. A page contains cards grouped around a task-based theme.

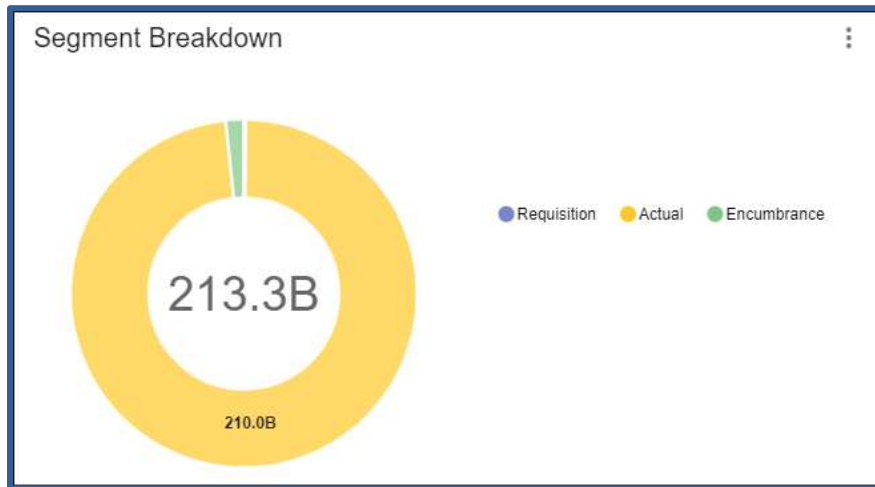


The page groupings in the navigation menu are controlled by the **Group Pages By** setting found in the **Edit Pages** dialog box, explained further in the [Manage Content](#) section.

To view a page, click the link to that page. From the Omnibar, click the Menu button, and then click the link to a page in the list.



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



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

To add, modify, or publish a page, use the options in the Manage Content group of the menu, discussed in the next section.

MANAGE CONTENT

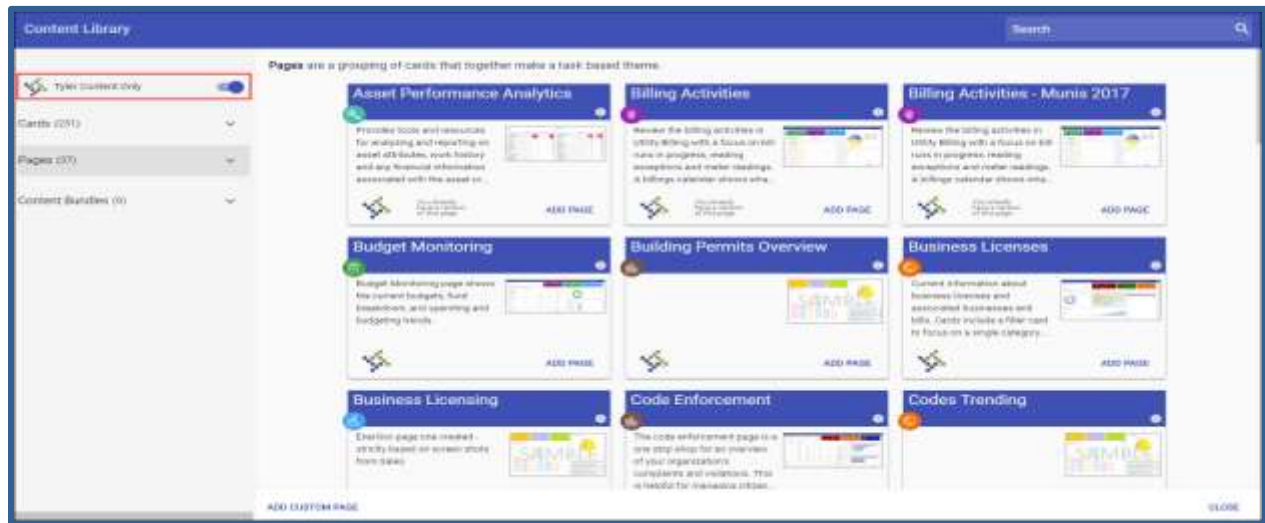
The **Manage Content** group in the menu features the **Content Library**, **Edit My Pages**, and **Page Layout** options.



Note: Depending on your permissions, you may not see all options. For example, the **Publish Page** option is not available if your user role does not have permission to publish content.

CONTENT LIBRARY

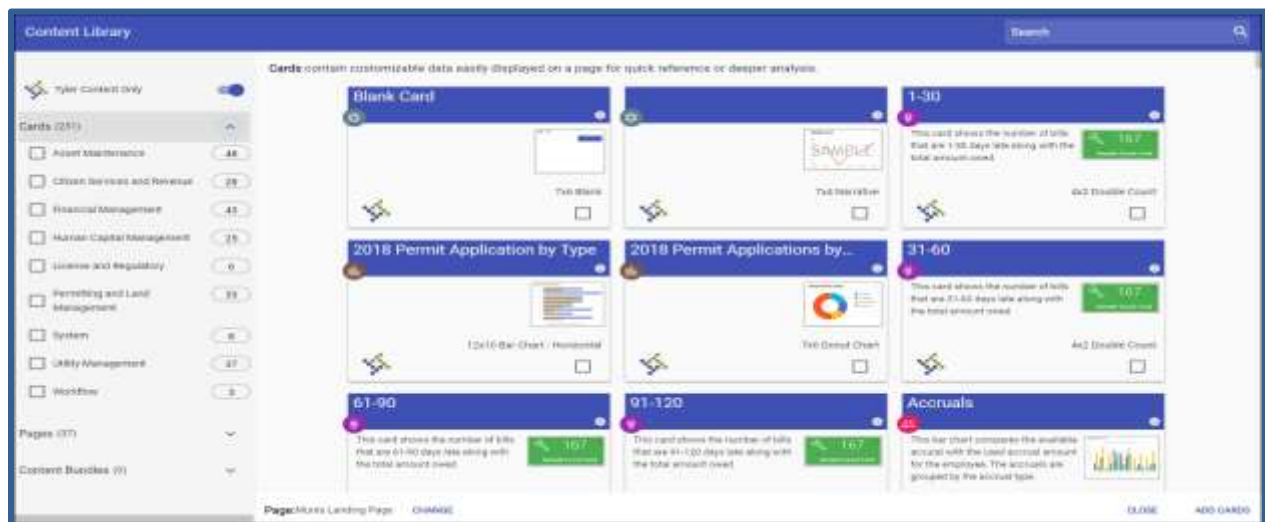
The **Content Library** allows you to add pages, cards, and content bundles to your Tyler Hub. You can add custom content that users at your organization have created, or out-of-the-box pages and cards provided by Tyler. The Tyler Content Only slider determines whether user-defined pages and cards are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



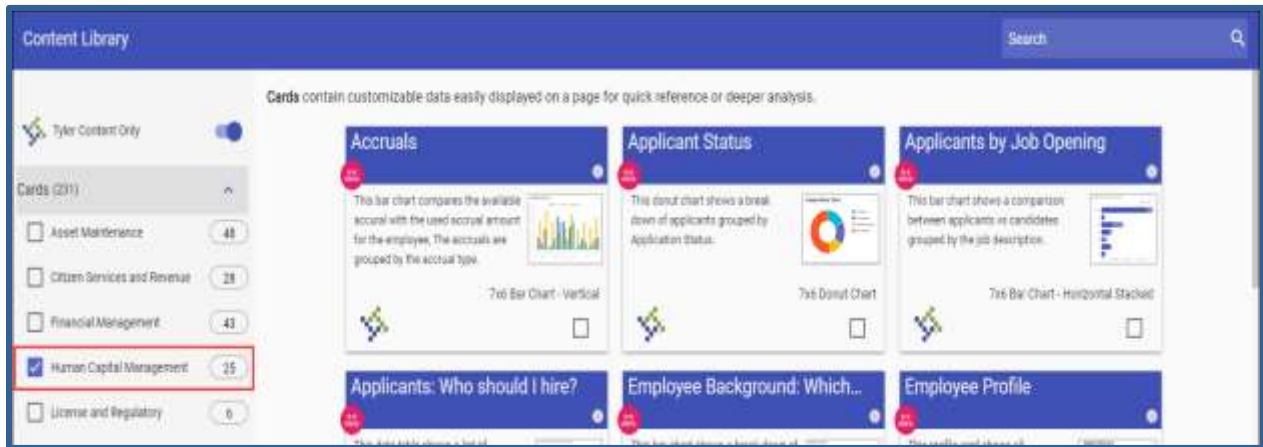
Note: You must have the necessary permissions enabled to access all the features in the **Content Library**. Some features, such as the Cards tab, are hidden if you lack the proper permissions.

Cards Tab

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

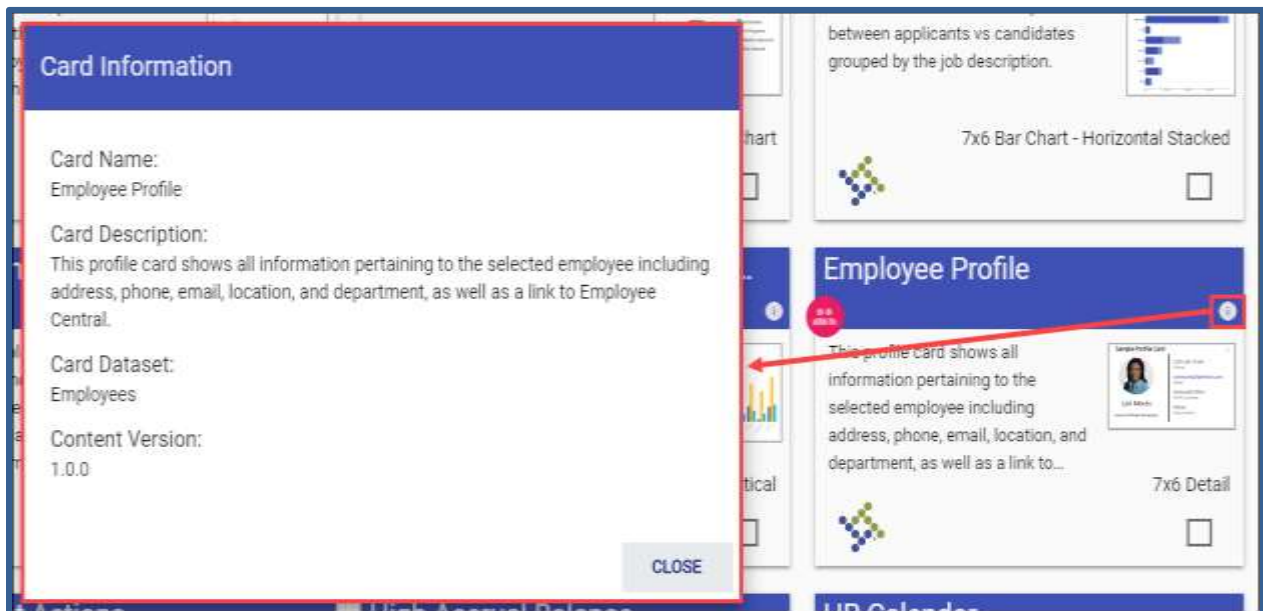


Use the search box to narrow the results or select the check boxes to apply filters based on specific functional areas. For example, choose Human Capital Management to display only the cards related to that area.



Using the following Employee Profile card as an example, individual cards display information about the card contents, including:

- The title of the card (Employee Profile)
- An icon indicating the functional area (in this case, Human Capital Management)
- An Information button that displays additional card information, including the card name, description, dataset, and version
- A brief description of the card
- A sample thumbnail image of the visualization
- The card dimensions (7 by 6)
- The card type (Detail)
- The Tyler logo, if the card is a default card supplied by Tyler
- A check box for selection



Adding Cards to a Page

If your permissions allow, you can add cards to a page to customize your Hub pages.

To add cards to a page:

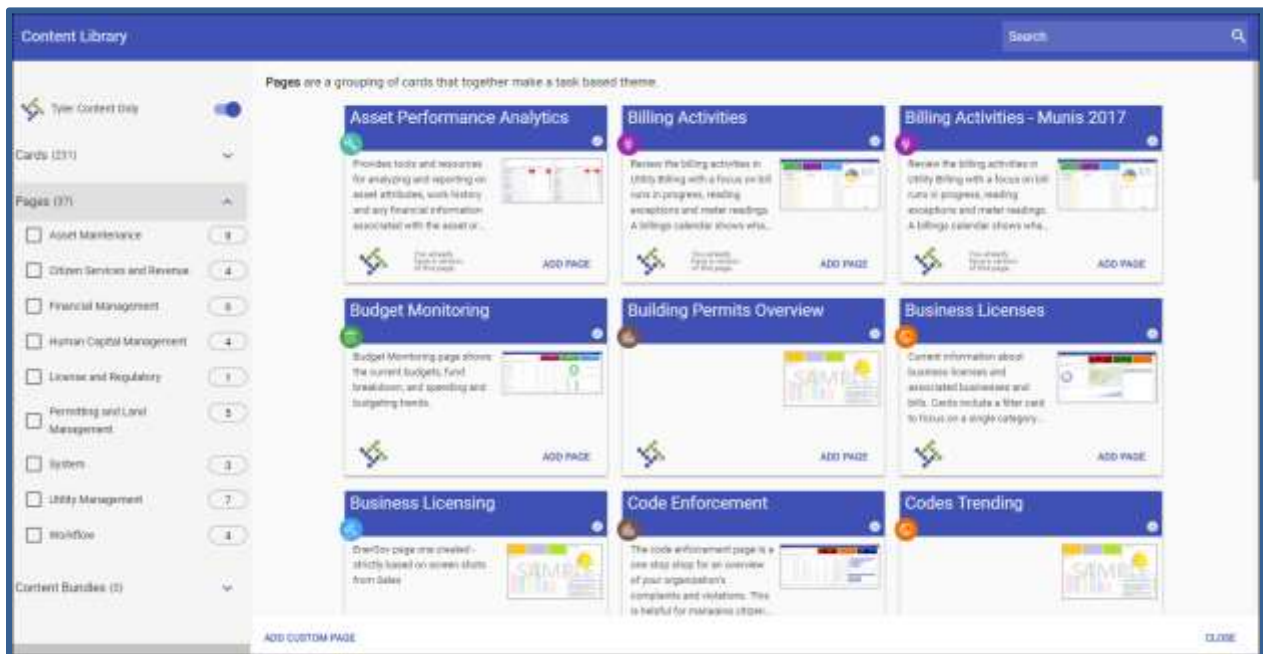
1. From the Cards tab, select the check box for each card to add. Use the filters or the search box to narrow the scope of cards displayed.
2. At the bottom of the dialog box, confirm the selected page is correct.
3. To add the cards to a different page, click Change. The program displays a list of available pages.
4. Select the correct page from the list.

Note: If you choose to add the cards to a new page, the program displays a prompt to enter the name of the page. Type the name of the page and click OK.

5. Click Add Cards. The program closes the dialog box and refreshes the page to which you added the cards.

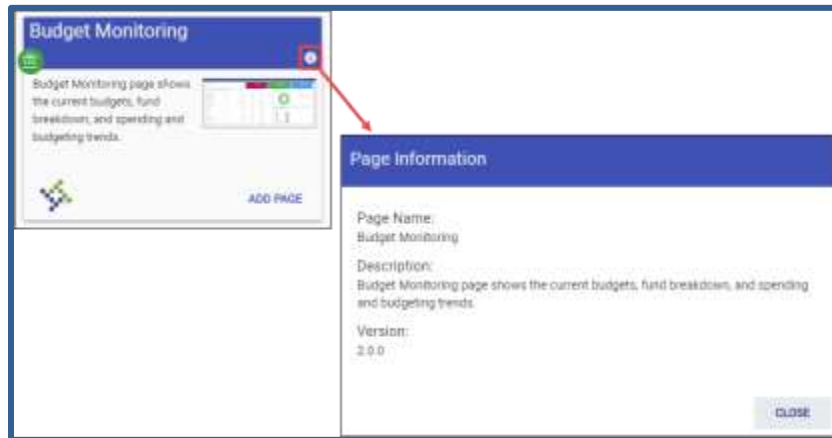
Pages Tab

Pages display groups of associated cards. For published pages, the cards have already been selected and defined, but you can customize them after you add them to your Tyler Hub. Use the search box to narrow the results or select the check boxes to apply filters for different modules. Adding a page allows you to quickly access it from your available menu options.

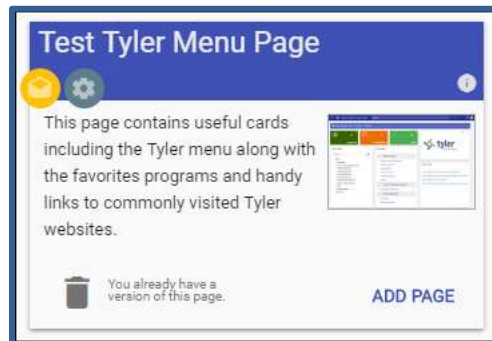


Like cards, individual pages display:

- The title of the page (Budget Monitoring)
- An icon indicating the functional area (in this case, Financial Management)
- An Information button that displays additional page information, including the page name, description, and version
- 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.



Adding a Page to Your Tyler Hub

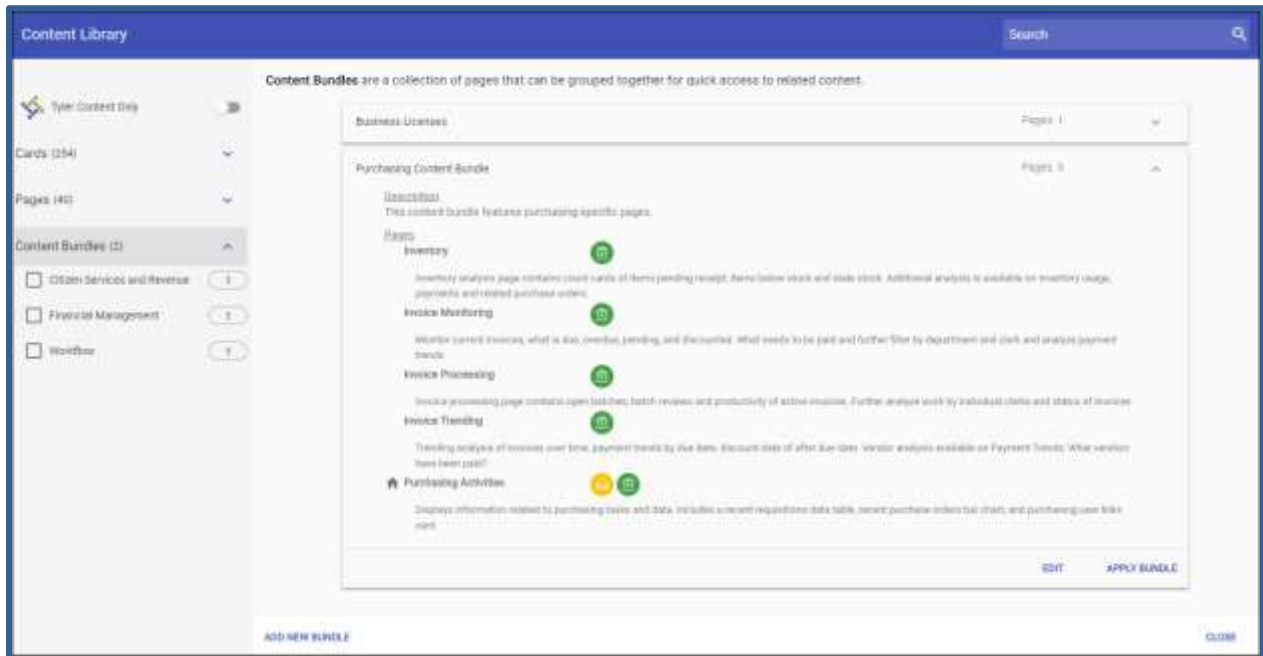
You can add pages to your Tyler Hub to review and access other data, if you have appropriate permissions.

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.

Content Bundles Tab

Content bundles are user-defined collections of pages and their associated cards. Click the Content Bundles tab to view the bundles, if available. Use the arrows to show or hide the contents of each bundle. If you have permission to add content bundles, the Add New Bundle option is available to create a content bundle.



Applying a Content Bundle to Your Tyler Hub

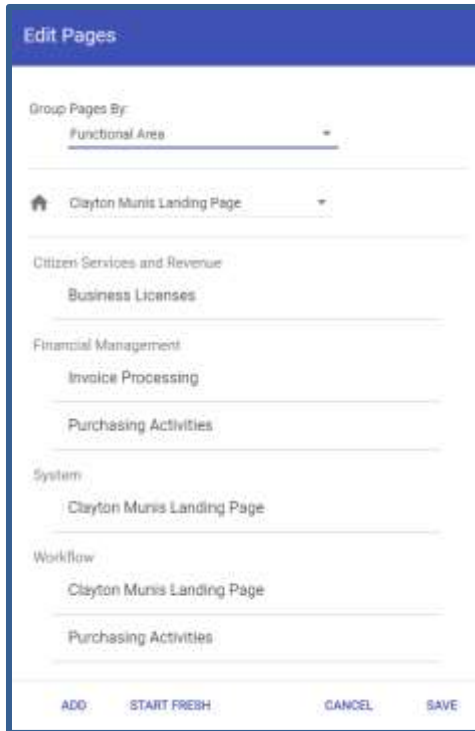
Applying a content bundle allows you to add several associated pages and cards at once, rather than choosing the individual items.

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.
3. Click Close to exit the dialog box.

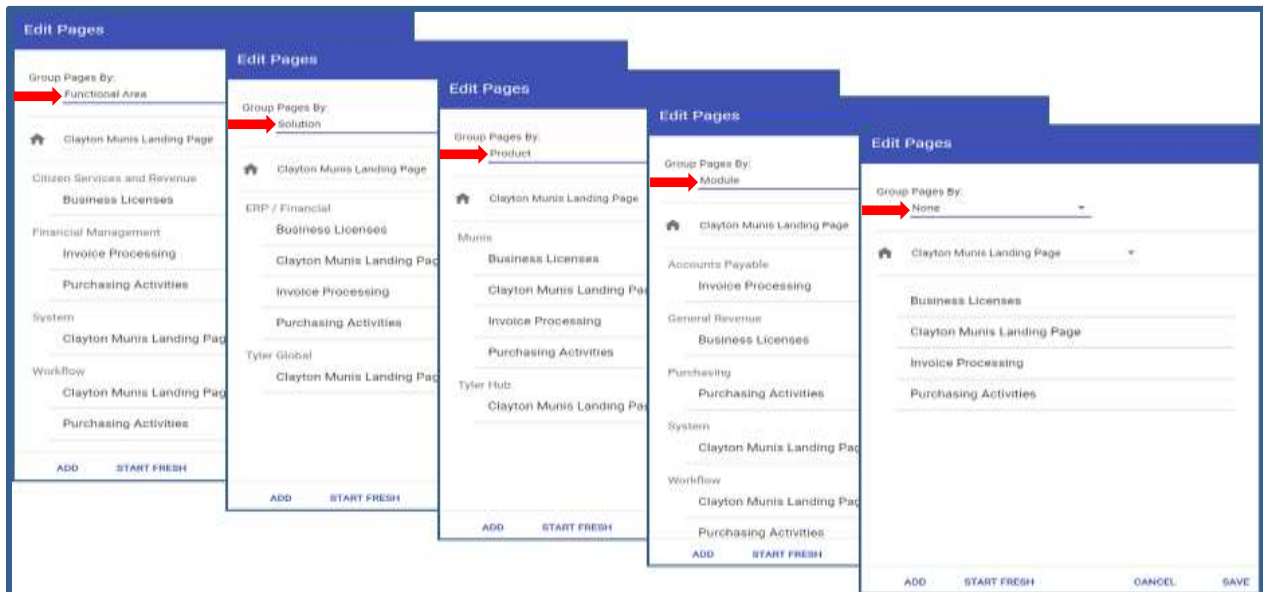
EDIT MY PAGES

The Edit My Pages option is available to modify the pages. Click **Edit My Pages** to display the Edit Pages dialog box, where you can add, rename, rearrange, and delete pages.



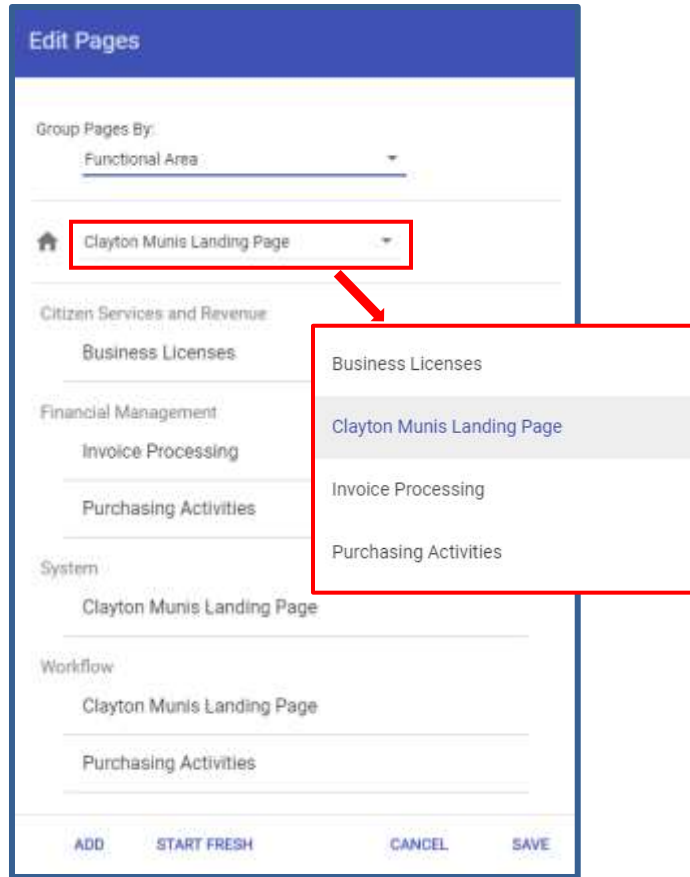
Updating Page Groupings

The **Group Pages By** list allows you to reorganize the pages in the menu according to functional area, solution, product, or module. The **None** option removes all page categorization and lists the pages alphabetically.



Setting the Home Page


The **Edit Pages** dialog box also features a list to change the selected Home page to another page you have added.

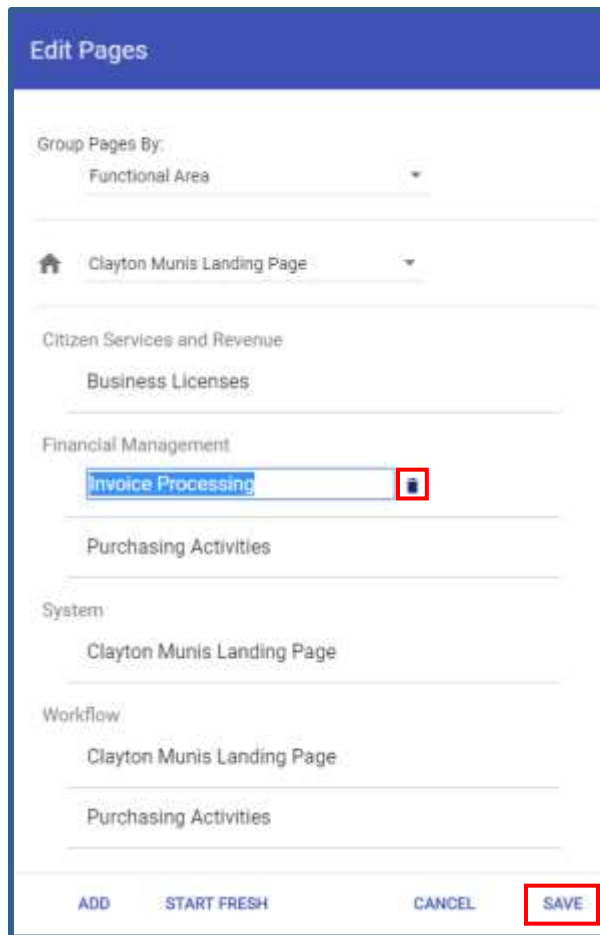


Deleting a Page from Your Tyler Hub

You can use the **Edit Pages** dialog box to delete a page from your personalized collection of Hub pages. If 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.

To delete a page:

1. Click Edit Pages.
2. Click the name of the page to delete. The program makes the page name editable and displays a Delete button.
3. Click the Delete  button beside the name to remove the page.



Note: The program does not display a confirmation message prior to deletion.

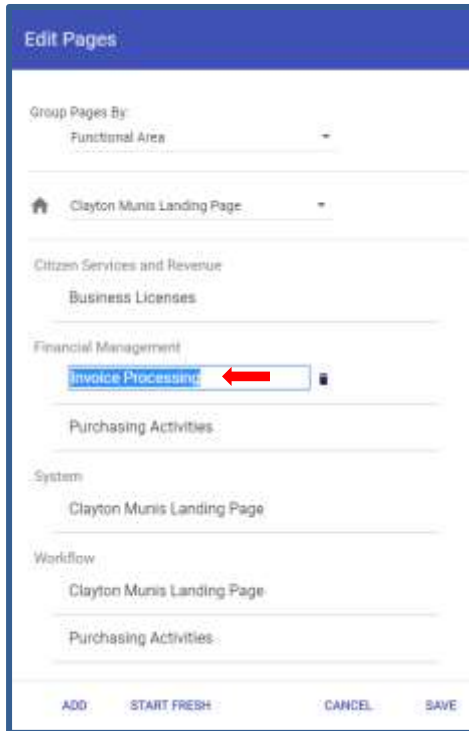
4. Click Save to save the changes. If the page was removed in error, click Cancel to discard the changes and restore the deleted page.

Modifying a Page Name in Your Tyler Hub

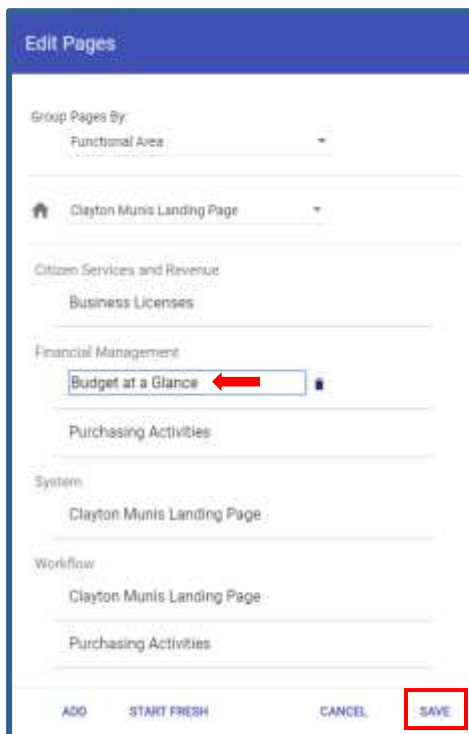
You can customize the names of pages in your personal collection of Tyler Hub pages. The page names remain unchanged in the Content Library unless you publish a version of the page with the new name.

To modify the name of a page in your Tyler Hub:

1. Click Edit Pages.
2. Click the name of the page to edit.



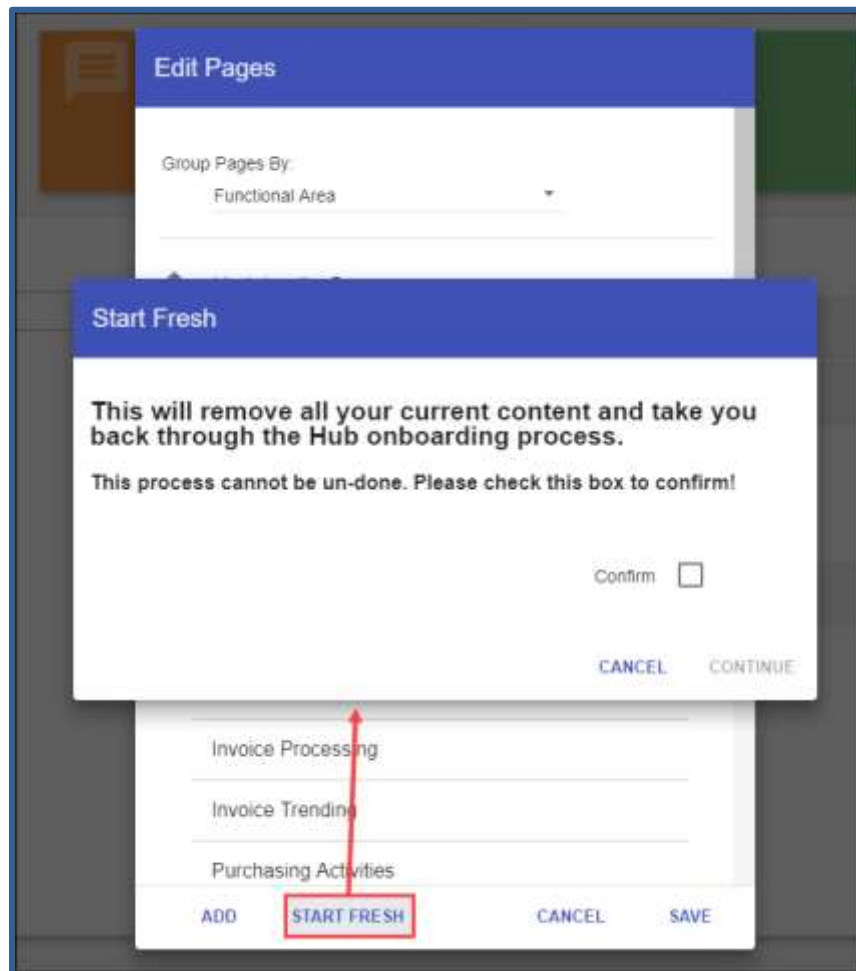
3. Enter the new name of the page and then click Save.



Note: You must click Save for the changes to be retained. If you click outside the Edit Pages dialog box without clicking Save, the changes are discarded.

Restarting Onboarding

The Start Fresh option restarts the onboarding process, removing the existing content and allowing you to add content and set a new Home page.



Select the Confirm check box and then click Continue to begin the onboarding process again.

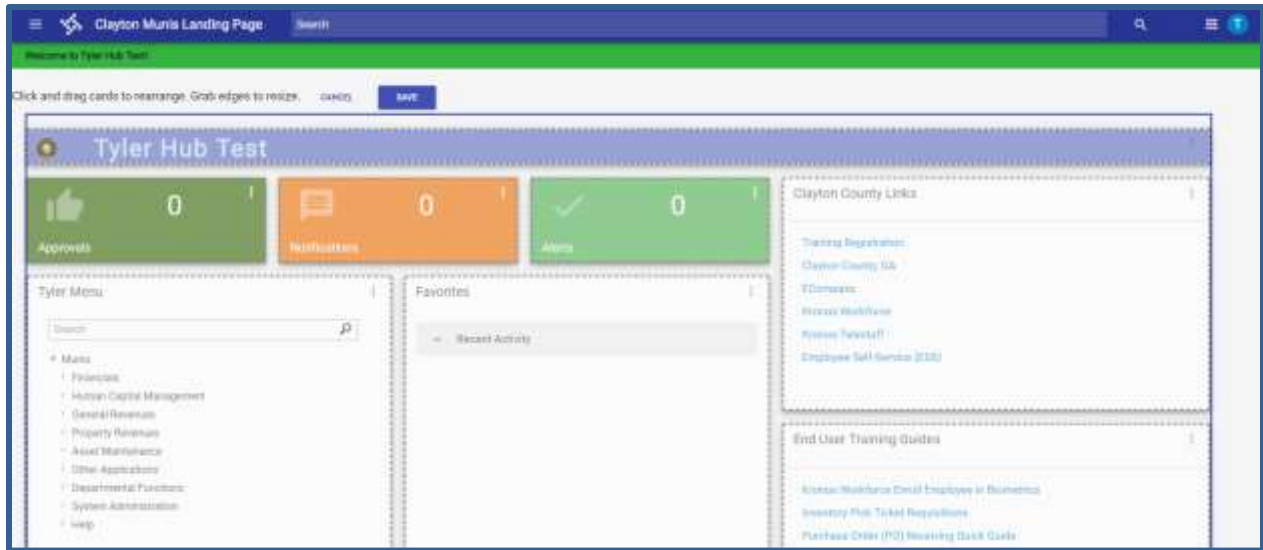
Refer to the [Onboarding](#) section for more information on that procedure.

PAGE LAYOUT

The Page Layout option allows you to move and resize the cards on the current page and save the new arrangement.

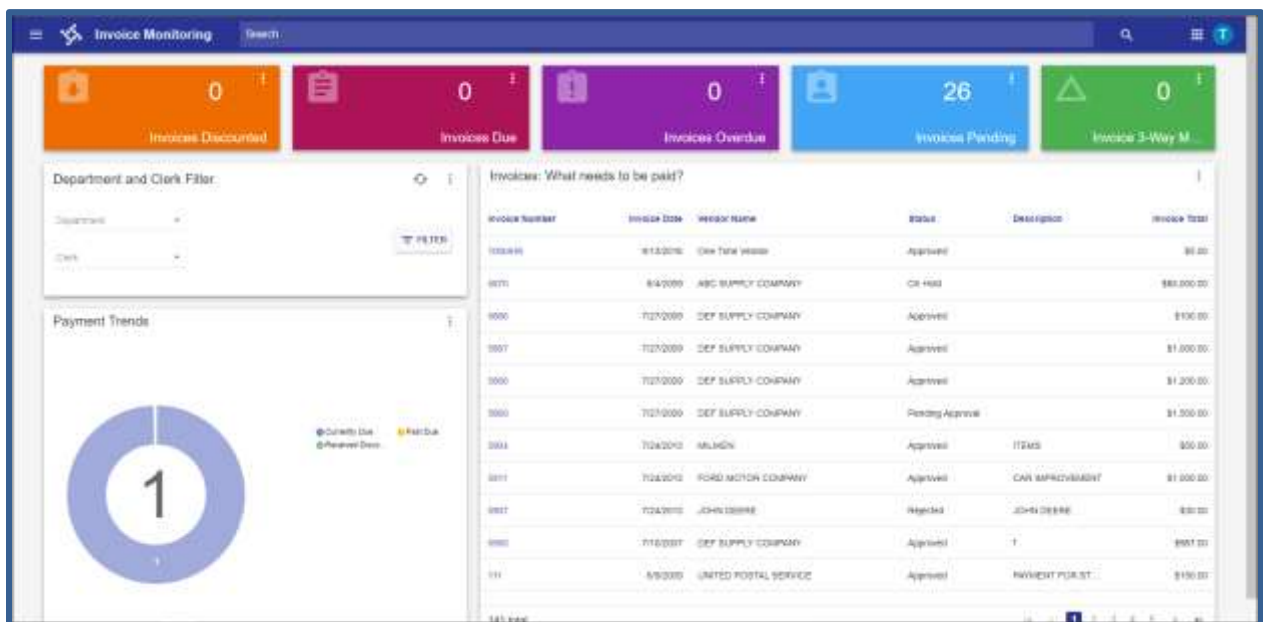
Note: This option is not available for pages that have read-only functionality.

Drag a card to move it to a new location on the page. Click and drag the lower-right corner of a card to resize it. Click Save to save and apply your changes.



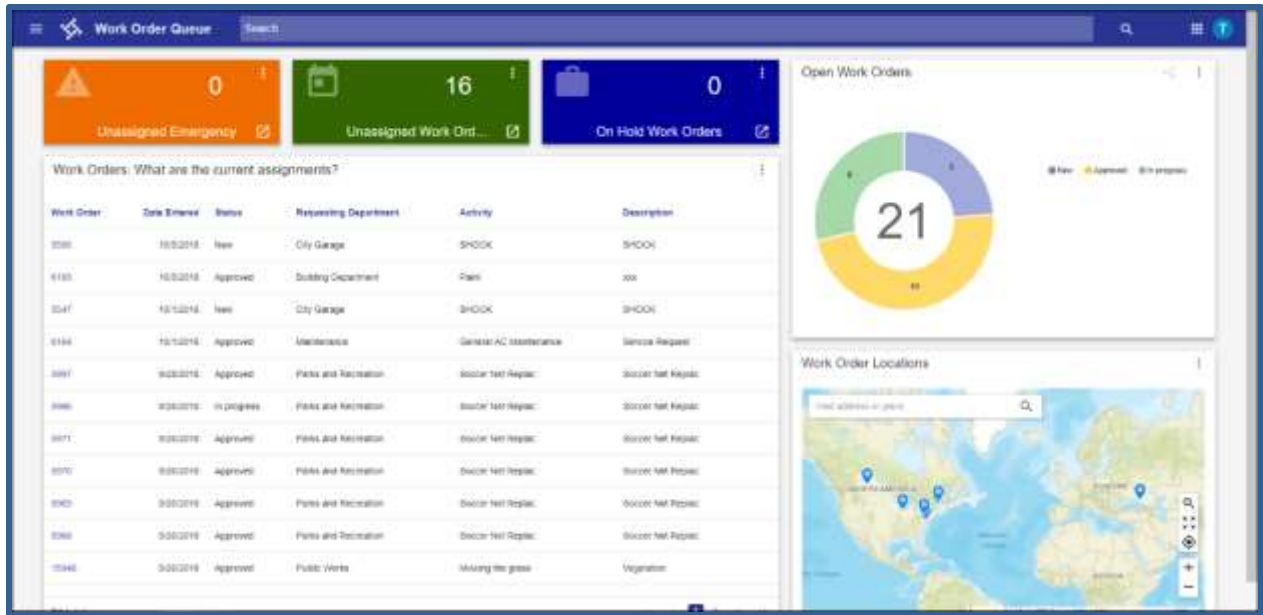
CARDS

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.

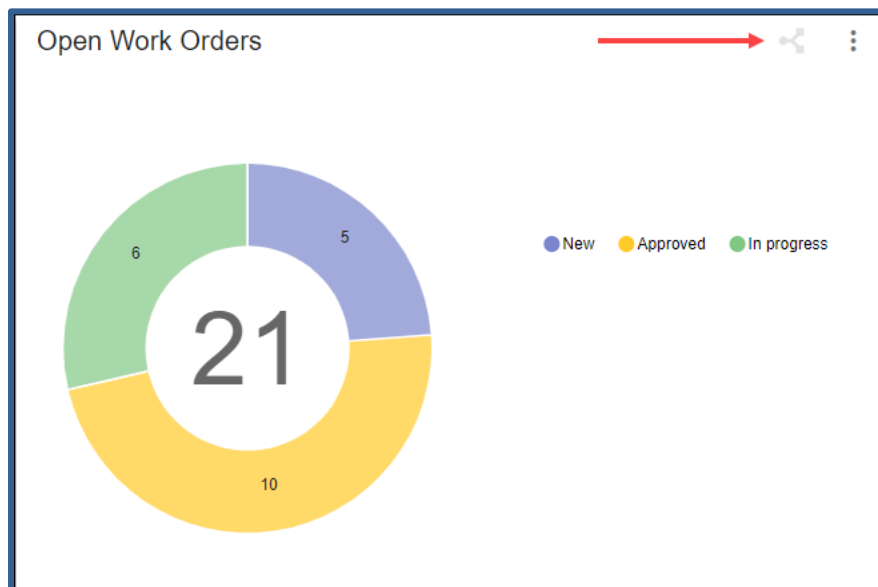


APPLYING A FILTER

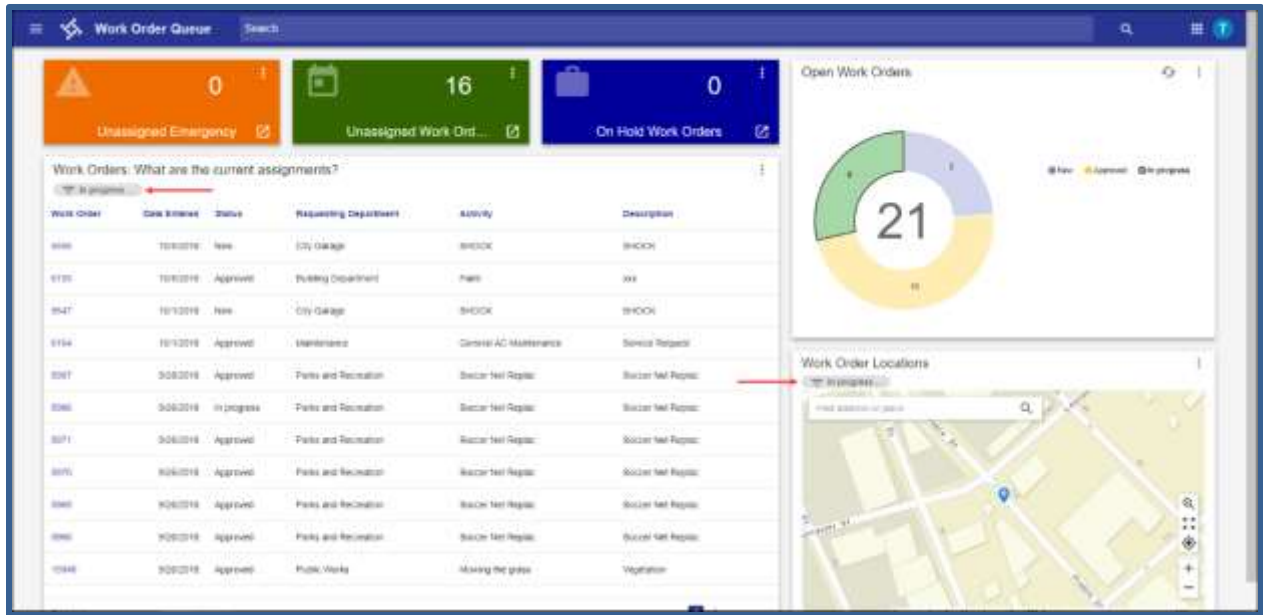
Some cards feature elements you can click to change the display or view other data sets. For example, this Work Order Queue page shows information for all the work orders in the database; no additional filters have been applied.



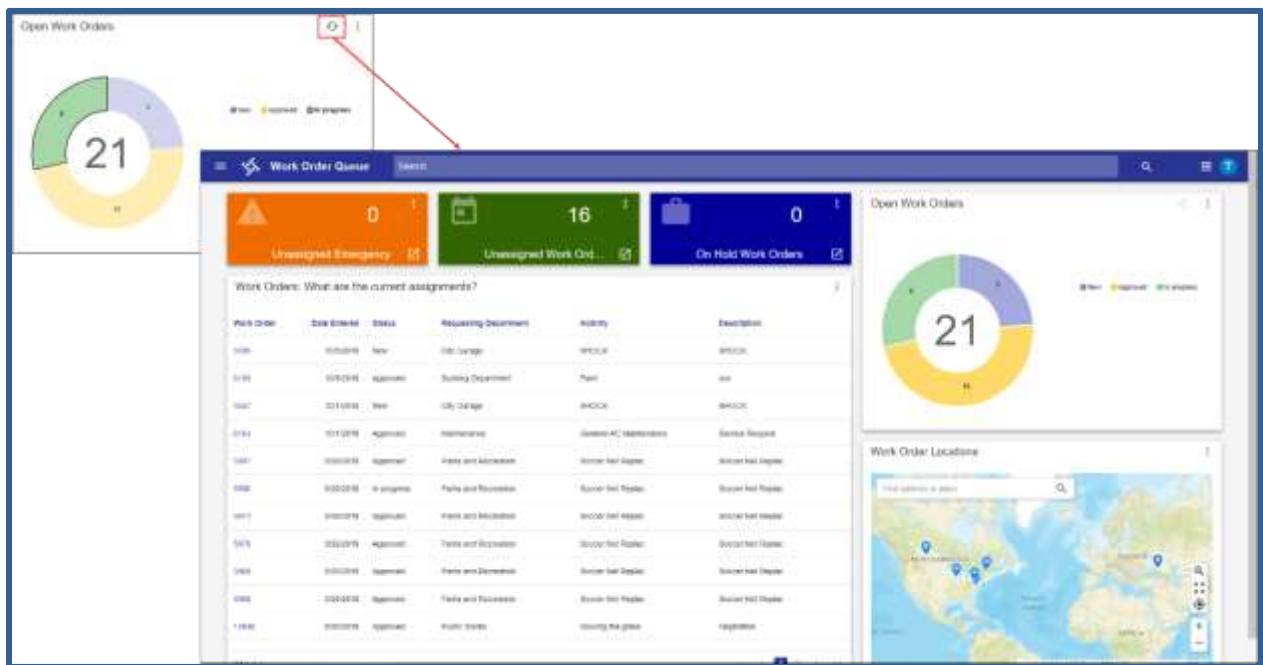
The Open Work Orders card displays a donut chart with different proportions for work orders in different statuses. This card also features an image indicating that it is a control card. Control cards allow you to apply filters that affect how Tyler Hub displays data on the page.



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

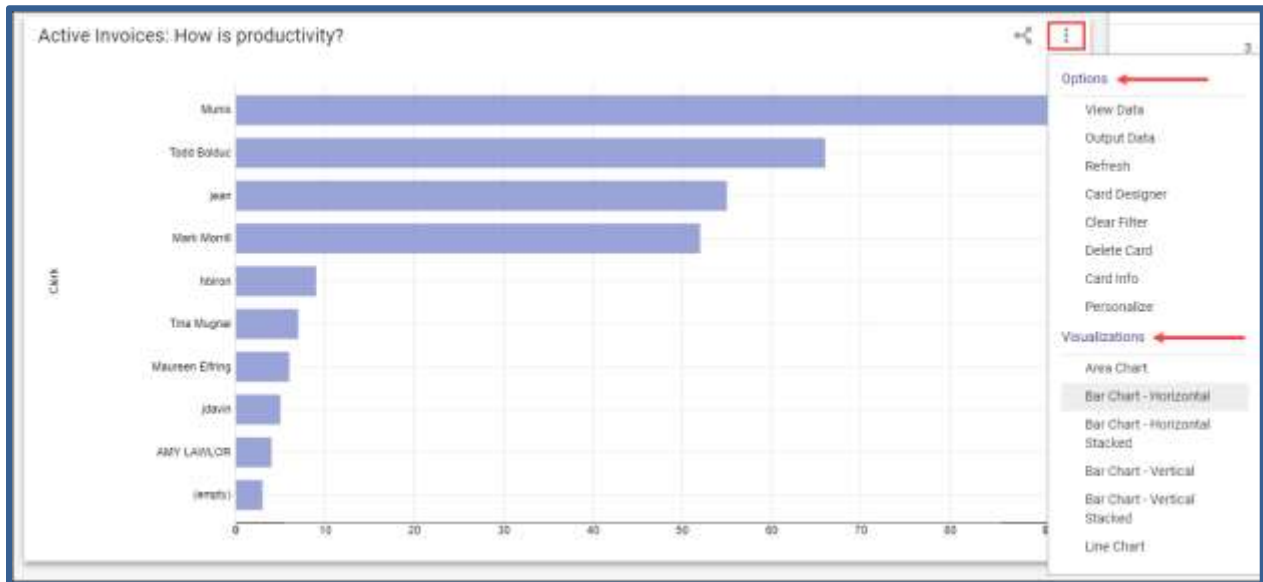


Click the Clear Filter button on the Open Work Orders card to remove the applied filter from the entire page.



MODIFYING A CARD

When you click the **More** button in the upper-right corner of a card, the program displays the Options and Visualizations groups.



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. Control cards also feature the Clear Filter option.

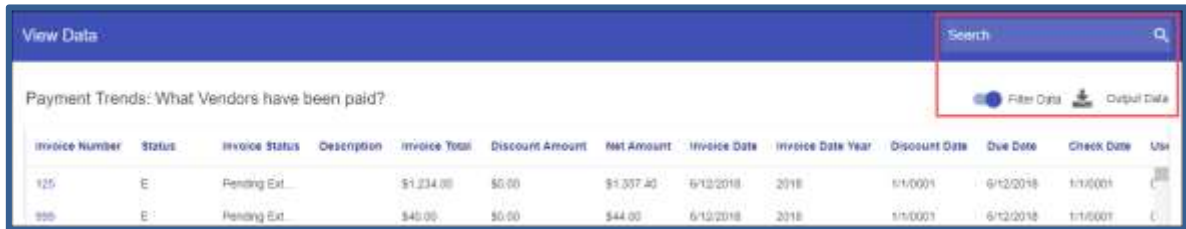
View Data

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

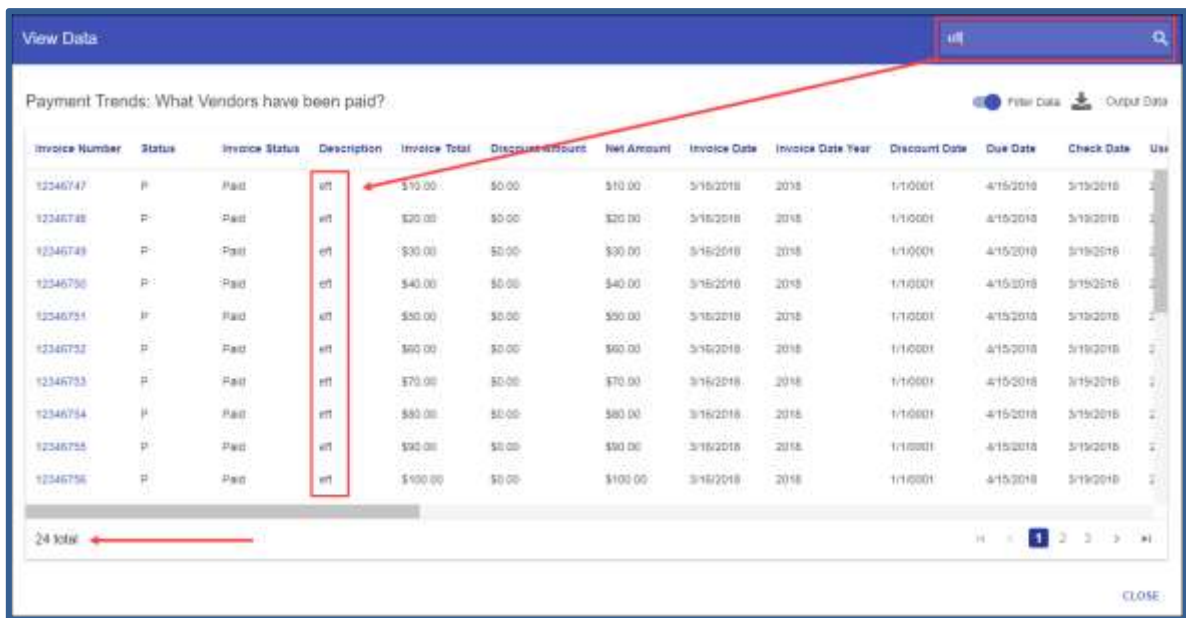
The screenshot shows the 'View Data' dialog box with a table of payment trends. The table has the following columns: Invoice Number, Status, Invoice Status, Description, Invoice Total, Discount Amount, Net Amount, Invoice Date, Invoice Date Year, Discount Date, Due Date, Check Date, and User ID. The data is as follows:

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
887	E	Pending Ext...	LINE DES...	\$60.00	\$0.00	\$60.00	1/8/2018	2018	1/1/0001	1/8/2018	1/1/0001	0
1234	E	Pending Ext...	W/18/14...	\$12,000.00	\$0.00	\$12,000.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
23456	E	Pending Ext...	DESC	\$50.00	\$0.00	\$50.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
4567	E	Pending Ext...	12345678...	\$90.00	\$0.00	\$90.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
887	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...	\$5,460.00	\$0.00	\$5,460.00	1/11/2018	2018	1/1/0001	1/11/2018	1/1/0001	0
406 total												

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



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.



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.

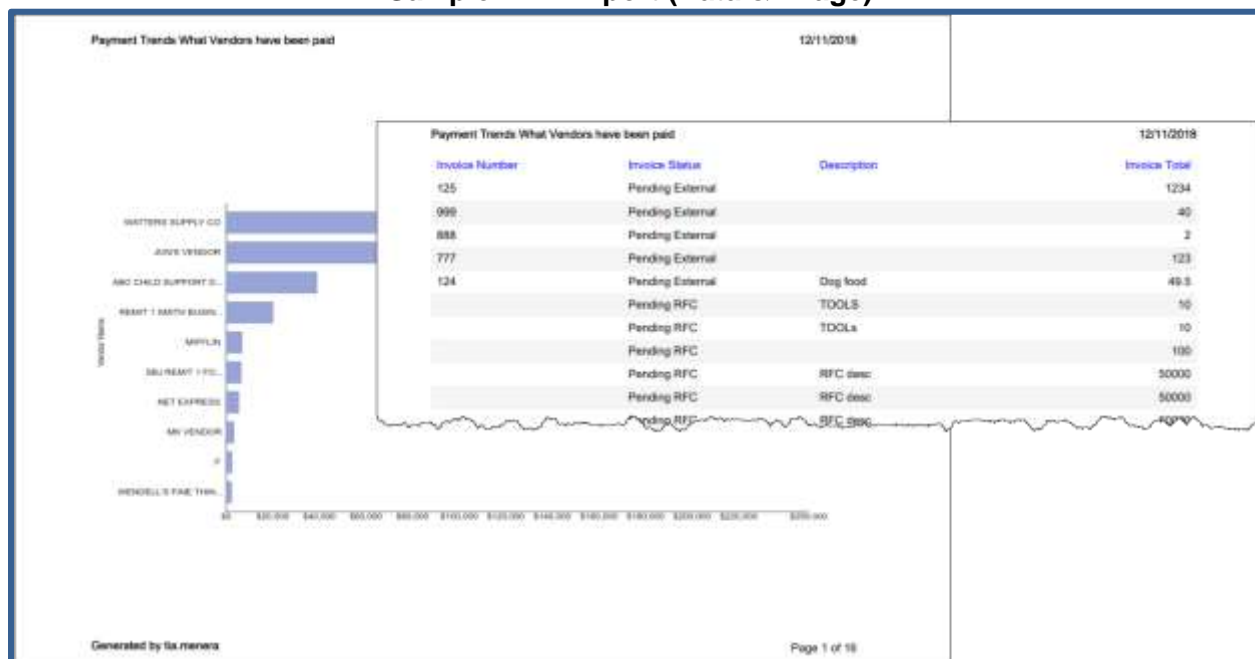
Output Data

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

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

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

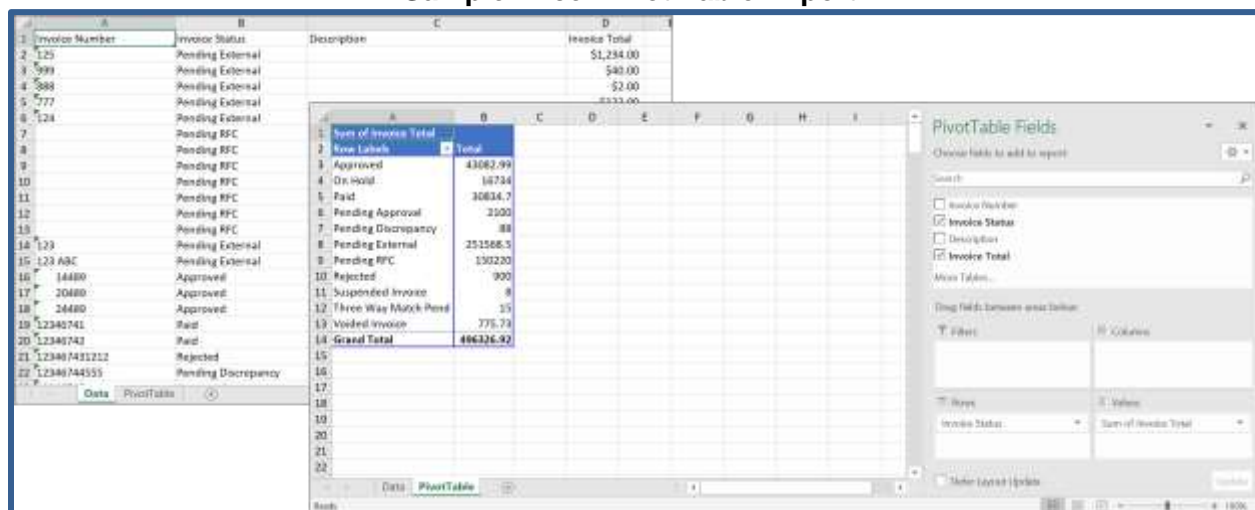
Sample PDF Export (Data & Image)



Sample Excel Export

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

Sample Excel Pivot Table Export



Sample CSV Export

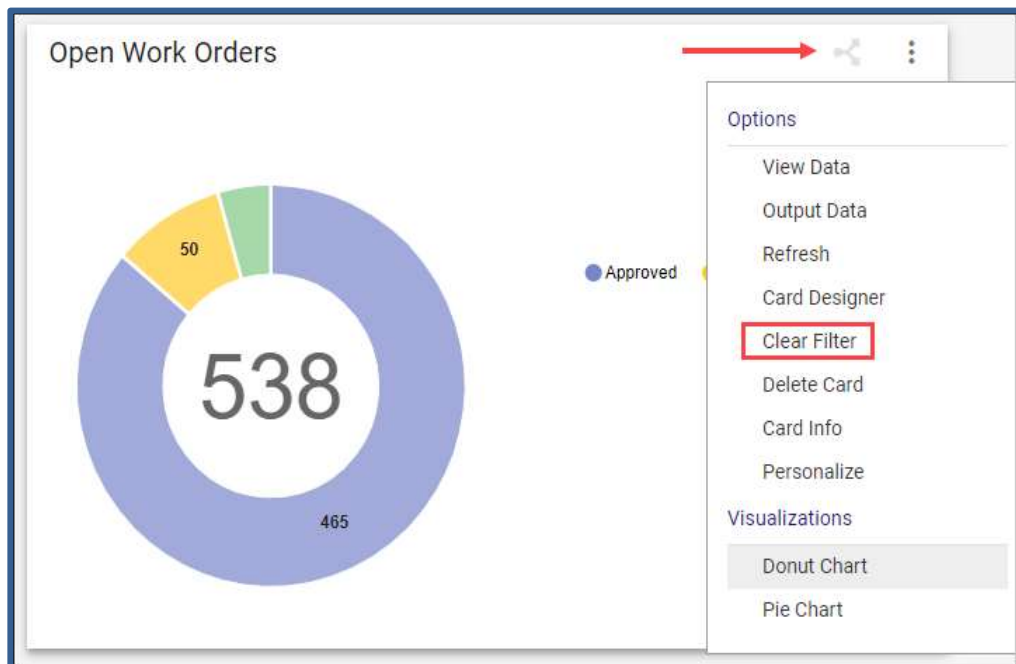
	A	B	C	D
1	Invoice Number	Invoice Status	Description	Invoice Total
2	125	Pending External		1234
3	999	Pending External		40
4	888	Pending External		2
5	777	Pending External		123
6	124	Pending External	Dog food	49.5
7		Pending RFC	TOOLS	10
8		Pending RFC	TOOLS	10
9		Pending RFC		100
10		Pending RFC	RFC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

Refresh

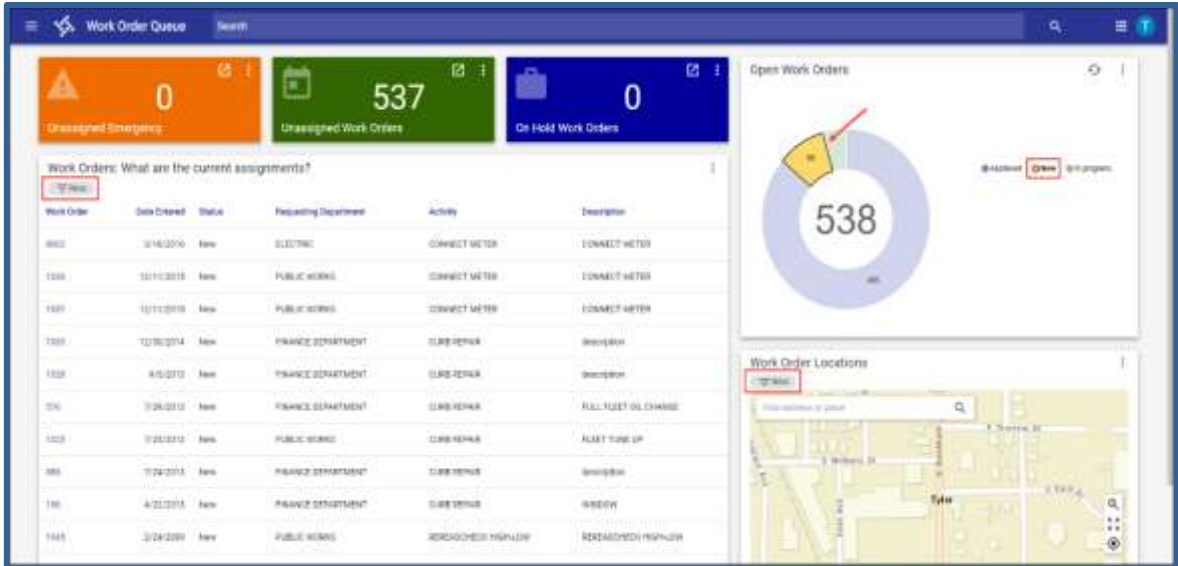
The Refresh option refreshes the card to retrieve the most recent data since the card was last refreshed or since changes were applied.

Clear Filter (Control Cards Only)

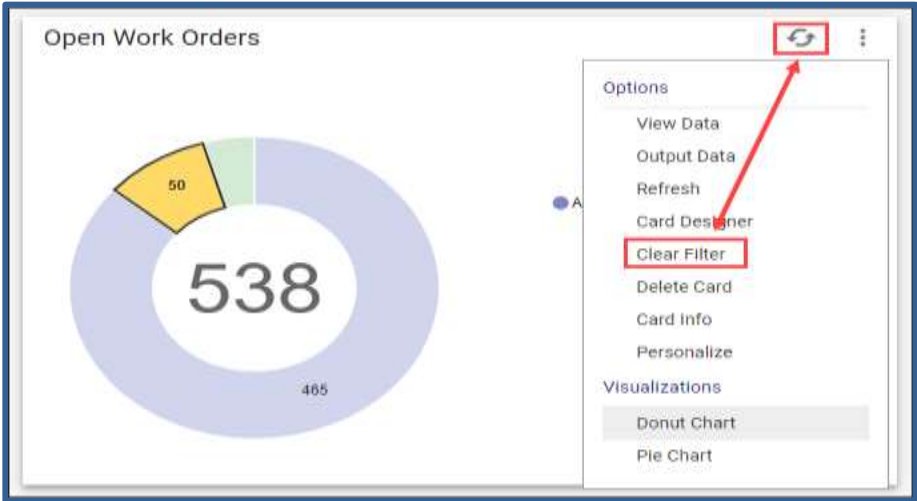
The Clear Filter option is available for control cards only. Control cards are identified by the Control Card indicator next to the More option. Each page typically has one control card that affects the data the other cards display on the page.



The Clear Filter option removes any filters that were applied using the control card. In this example, clicking the donut chart for the work orders with a status of New applies a filter to chart card as well as to the data table and map cards on the page.



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



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.



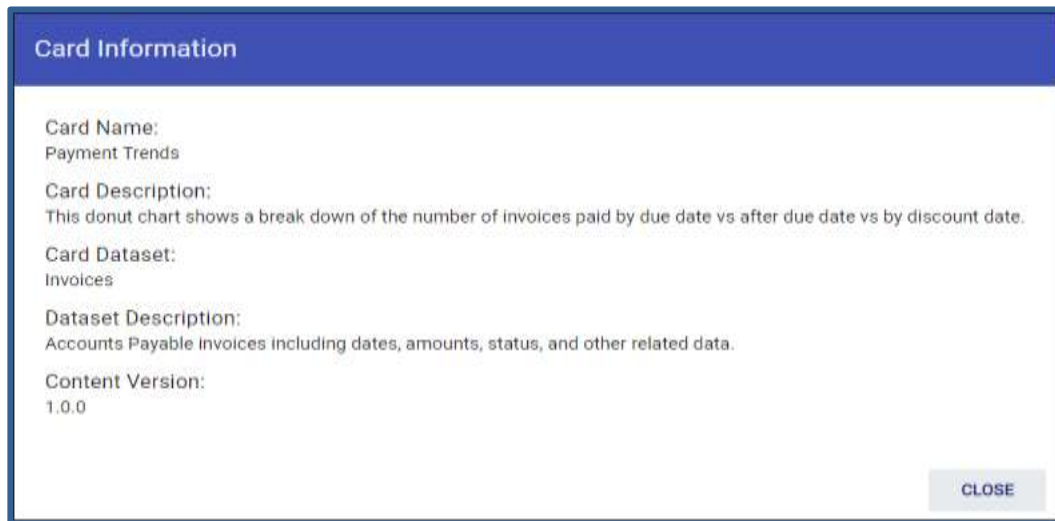
Click Yes, Delete to proceed with deleting the card. The program refreshes the page and removes the selected card.

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 which provides additional information about the card and its connected data set. This feature is informational only and can provide useful information if you are contacting technical support personnel.



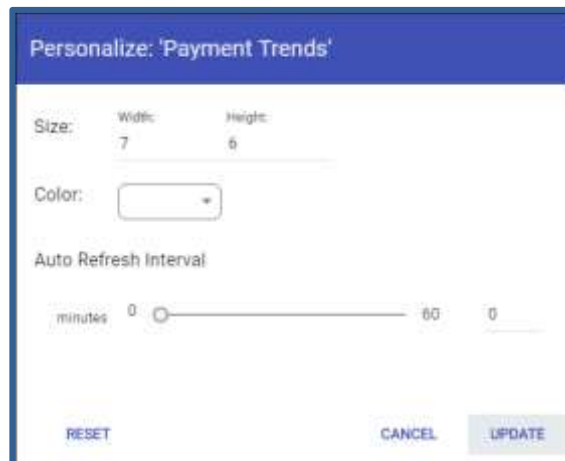
The screenshot shows a dialog box titled "Card Information" with a blue header. The content is as follows:

- Card Name:** Payment Trends
- Card Description:** This donut chart shows a break down of the number of invoices paid by due date vs after due date vs by discount date.
- Card Dataset:** Invoices
- Dataset Description:** Accounts Payable invoices including dates, amounts, status, and other related data.
- Content Version:** 1.0.0

A "CLOSE" button is located in the bottom right corner of the dialog box.

Personalize

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

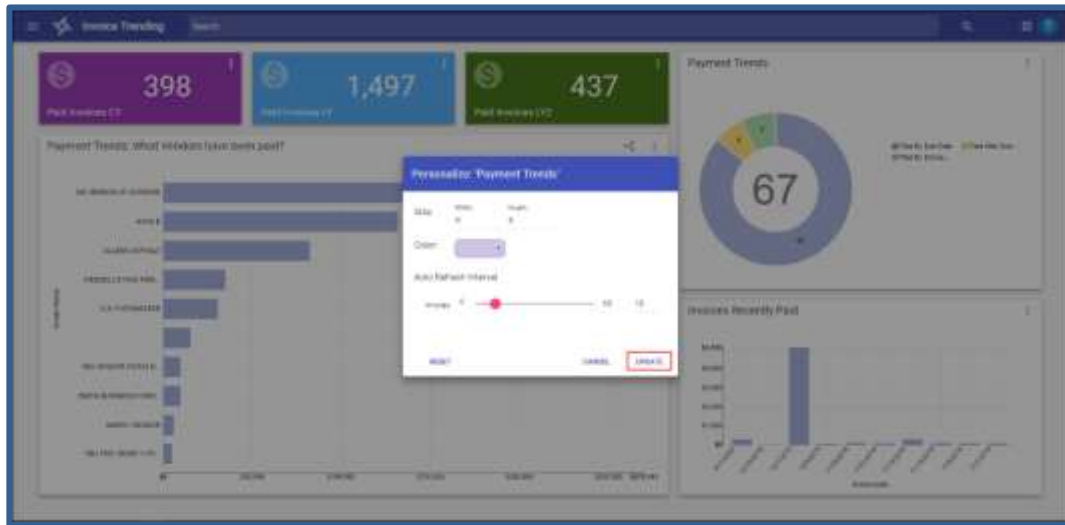


The screenshot shows a dialog box titled "Personalize: 'Payment Trends'" with a blue header. The content is as follows:

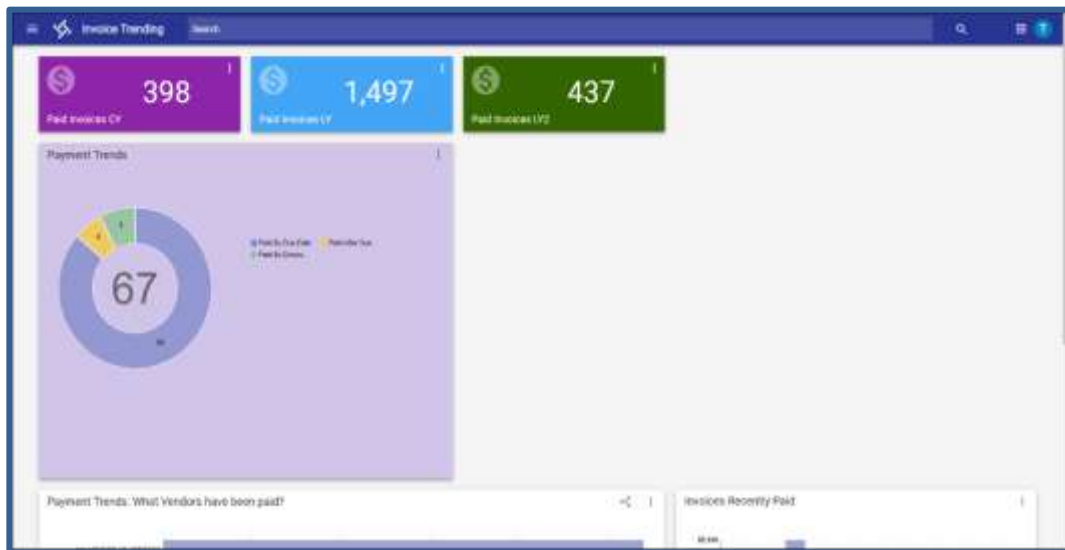
- Size:** Width: 7, Height: 6
- Color:** A dropdown menu.
- Auto Refresh Interval:** A slider control labeled "minutes" with values 0, 60, and 0.

Buttons for "RESET", "CANCEL", and "UPDATE" are located at the bottom of the dialog box.

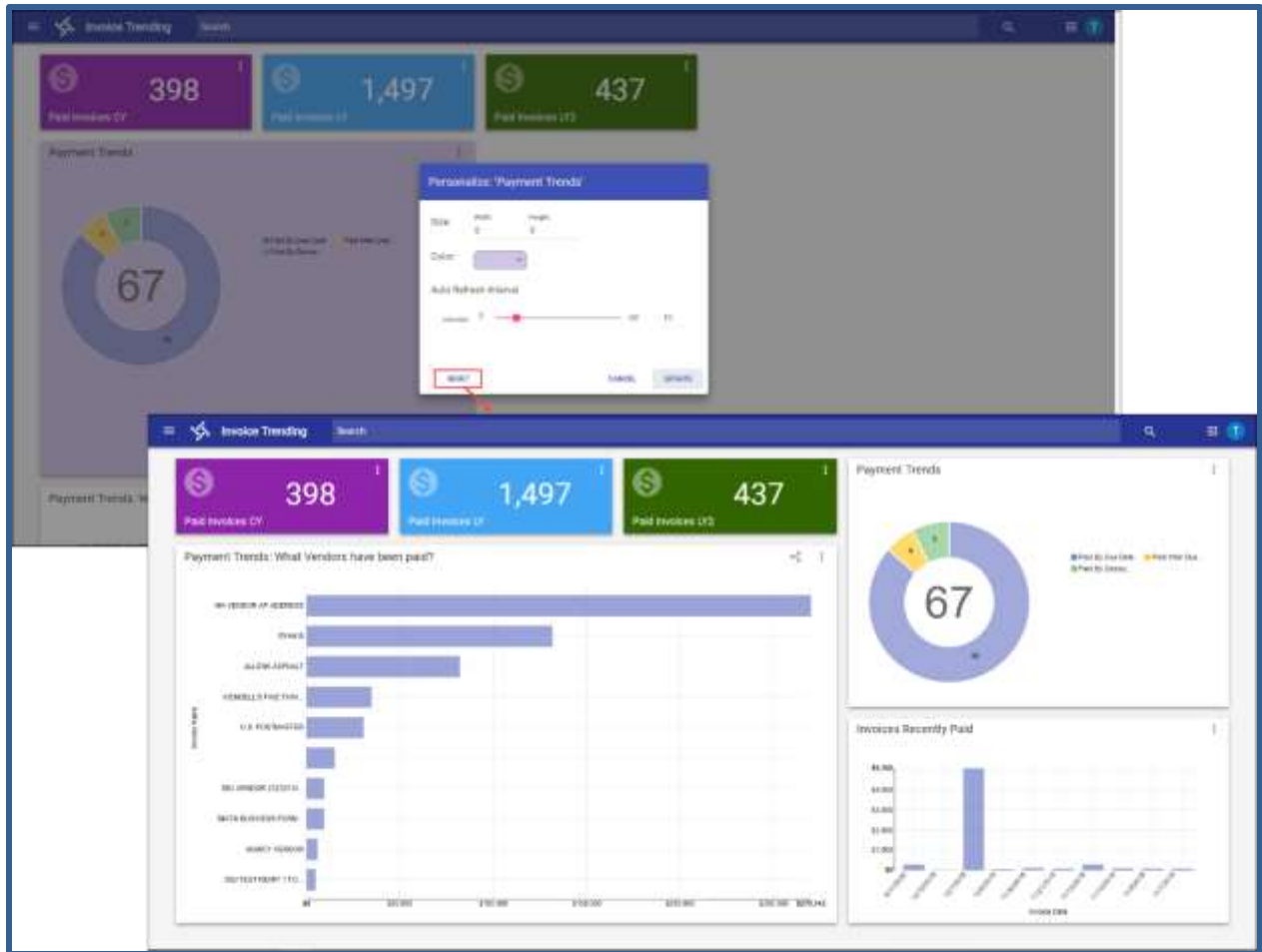
Make your selections and then click Update.



The page instantly applies the changes, moving the cards as necessary based on the size.

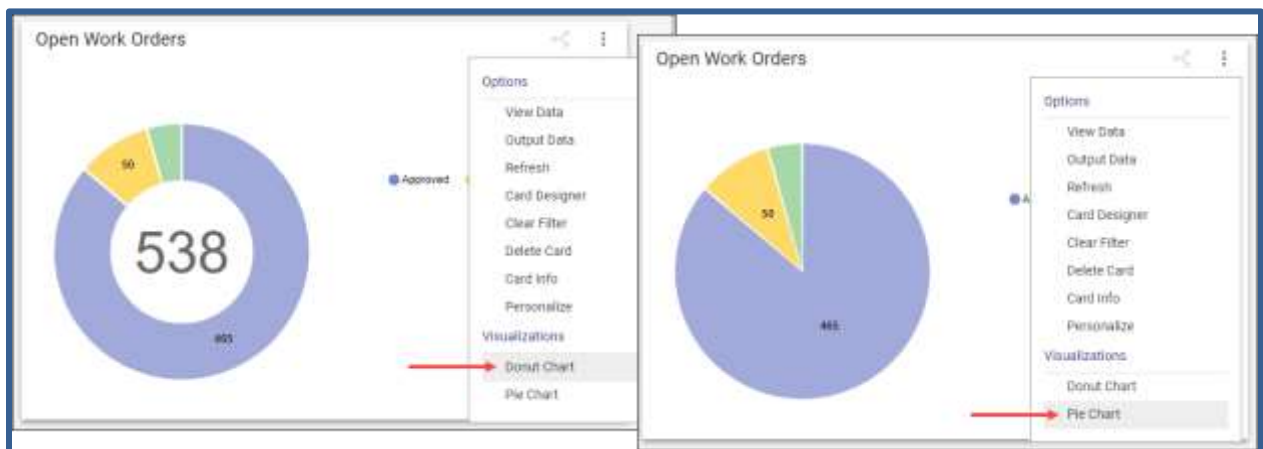


To remove all applied personalizations, click Reset in the Personalize dialog box. The page instantly resets the card to the default layout.



Visualizations

Visualizations affect the way Tyler Hub displays data on a card. The current selection is highlighted in the Visualizations group. Choose another visualization to view the data differently.



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

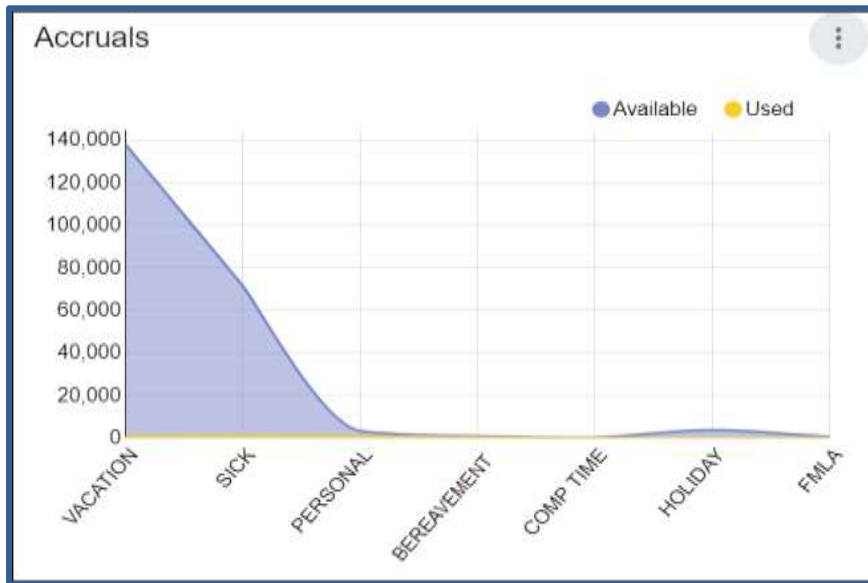
Appendix A—Visualizations

Tyler Hub features several options for visualizations, providing different ways to view card data. This appendix shows examples of common visualizations.

Area Chart

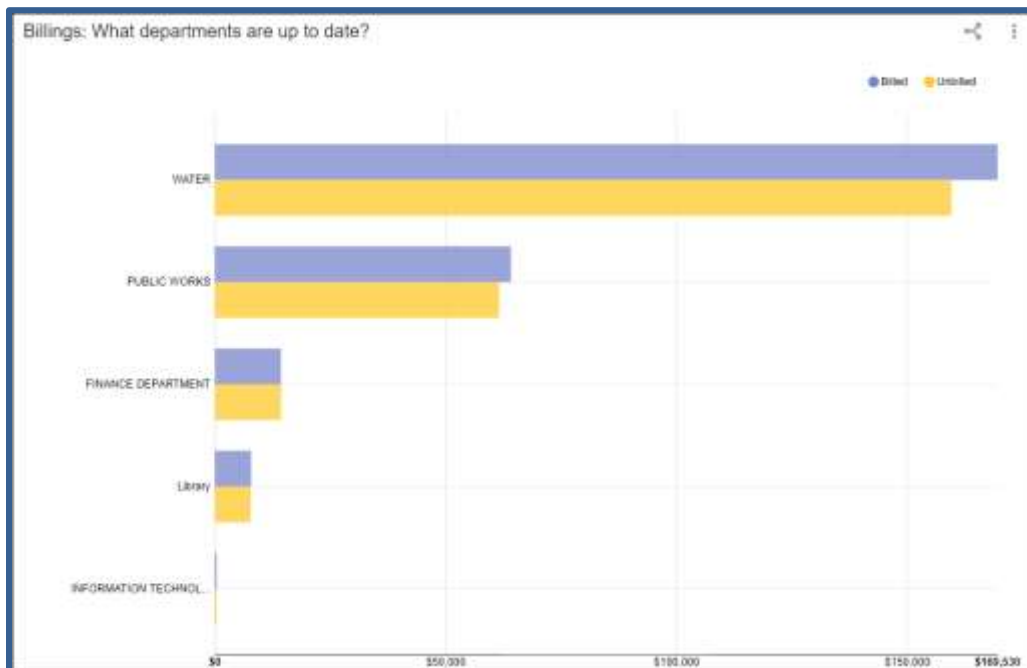
Card Type: Line

Area charts compare two or more data sets.



Bar Chart – Horizontal

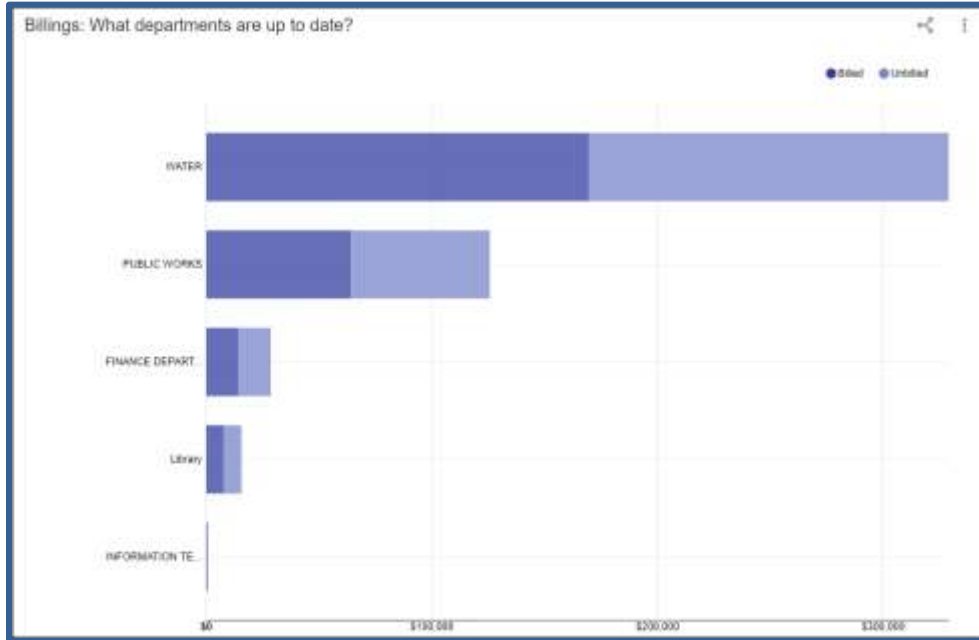
Card Type: Bar



Bar Chart – Horizontal Stacked

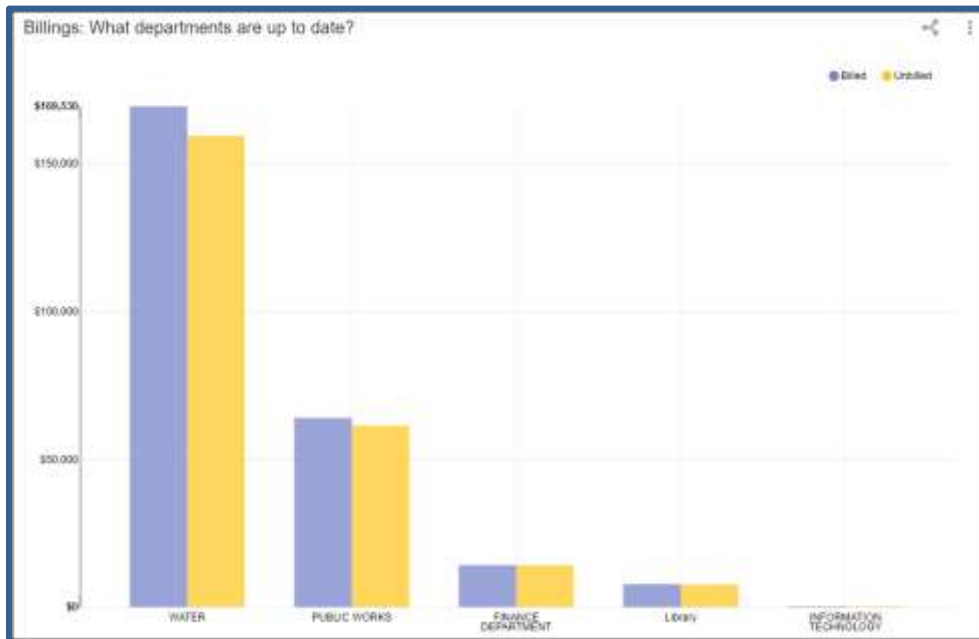
Card Type: Bar

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



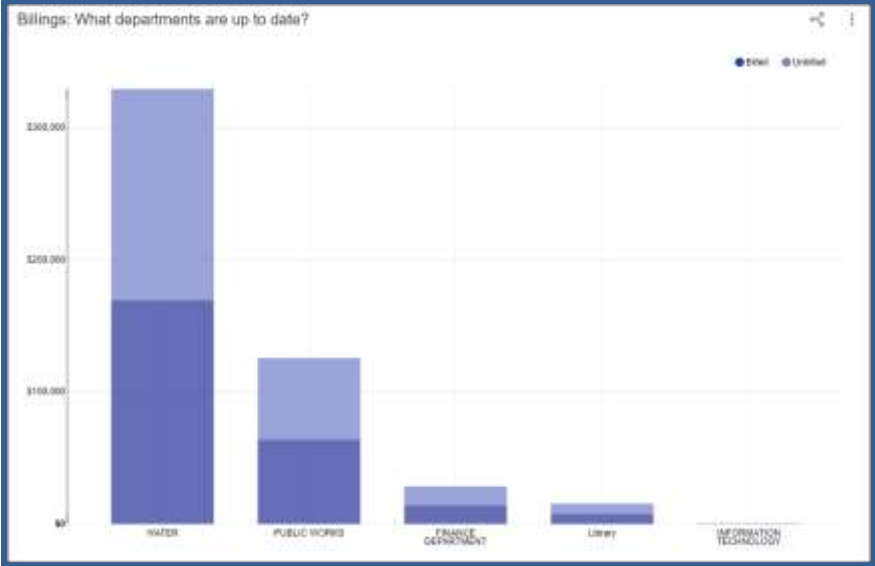
Bar Chart – Vertical

Card Type: Bar



Bar Chart – Vertical Stacked

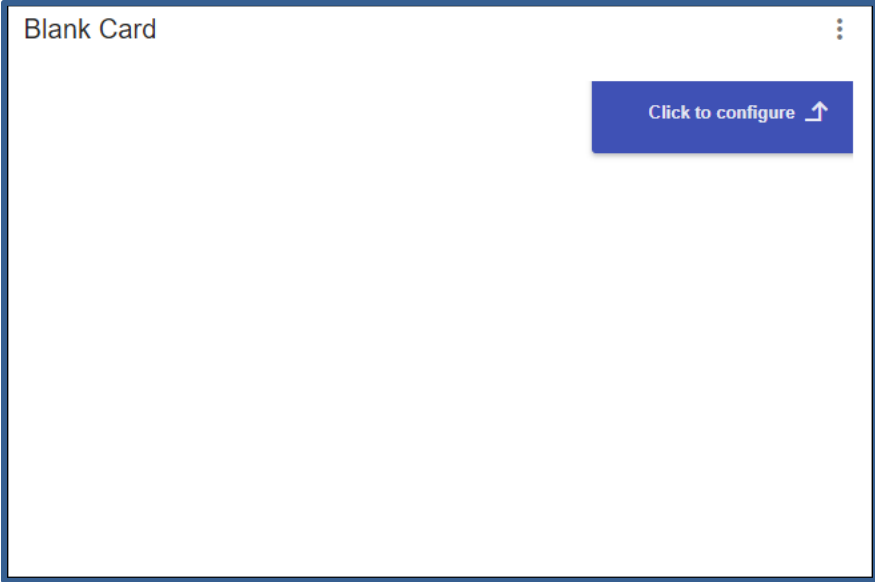
Card Type: Bar



Blank

Card Type: Miscellaneous

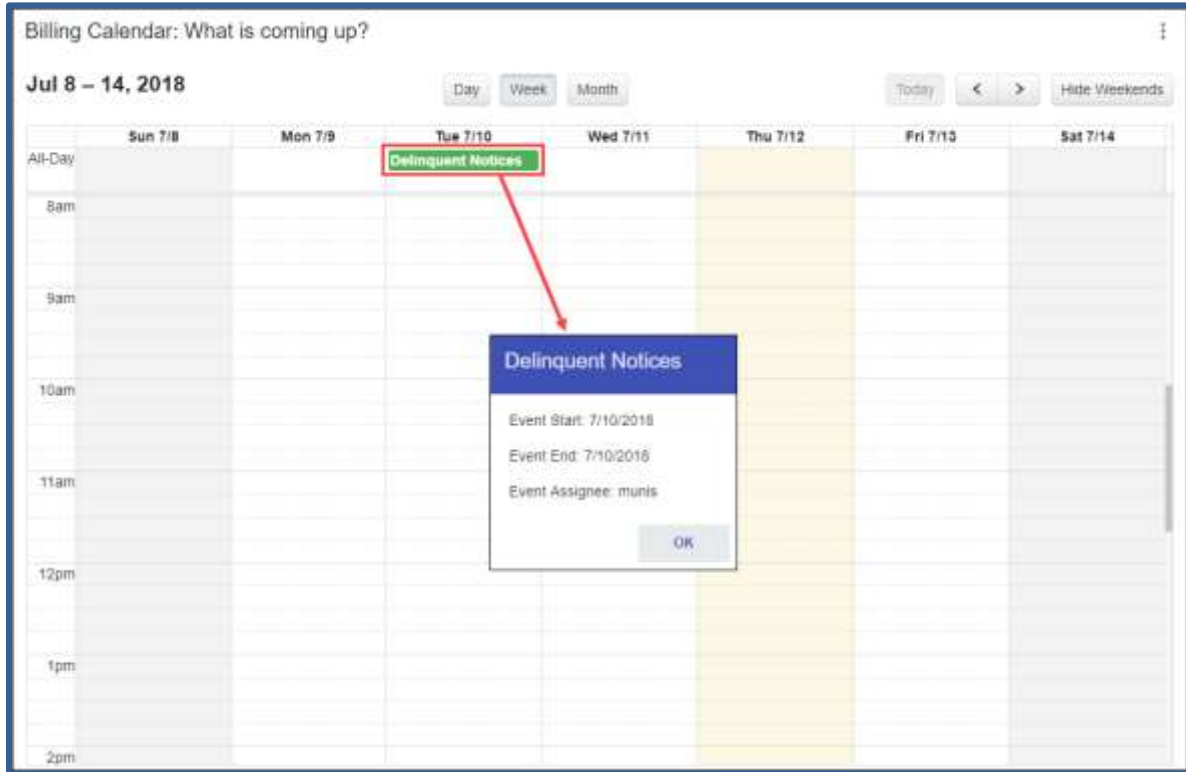
This card contains no data or connections until configured in the Card Designer.



Calendar

Card Type: Calendar

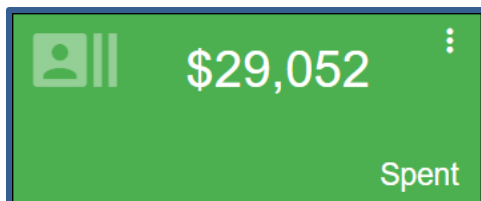
The Calendar card displays scheduled events in a daily, weekly, or monthly format. Click a scheduled event to view details. The Hide Weekends and Show Weekends options allow you to remove or include Sundays and Saturdays.



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	\$6,055.71	-\$6,055.71	✓
WEST FUND	17	\$0.00	\$0.00	\$0.00	

8 total

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

Inspections Unperformed - with Actions

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

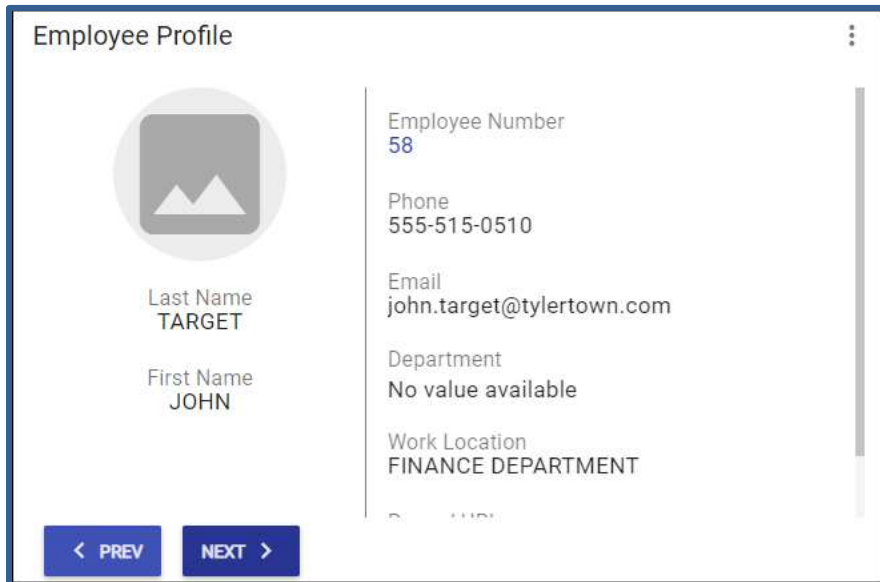
3,206 total

1 2 3 4 5

Detail

Card Type: Detail

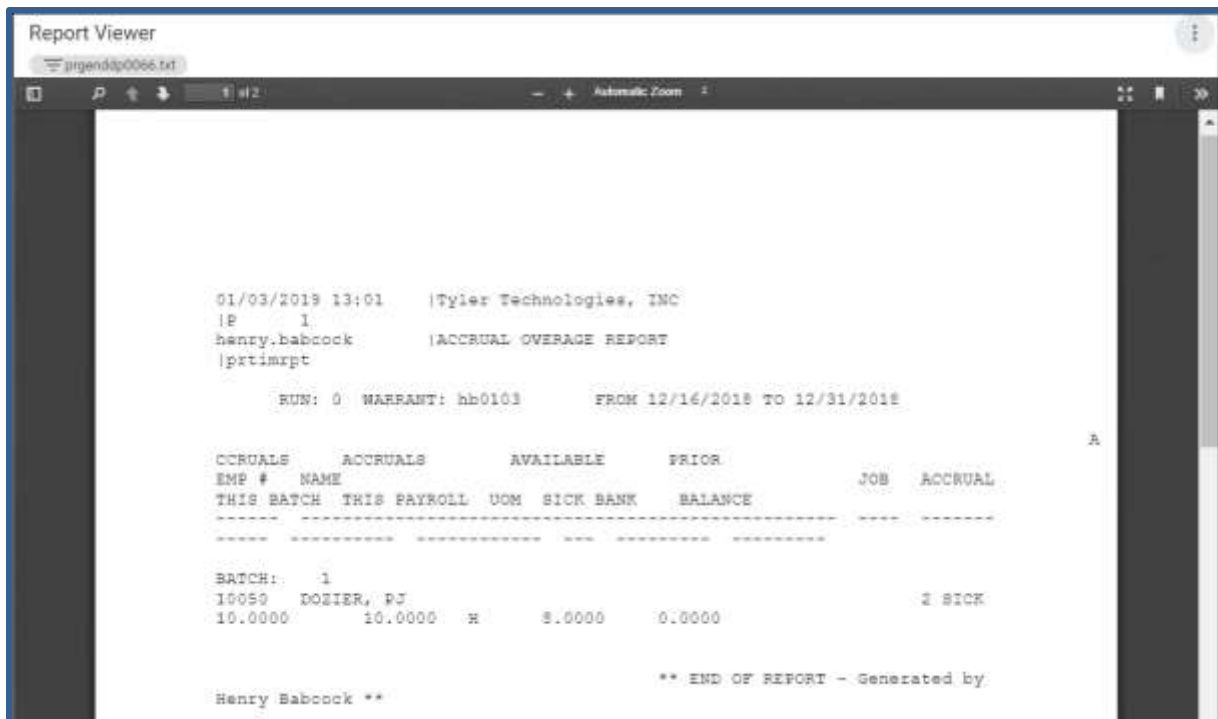
The Detail card displays additional information about a record.



Document Viewer

Card Type: Viewer

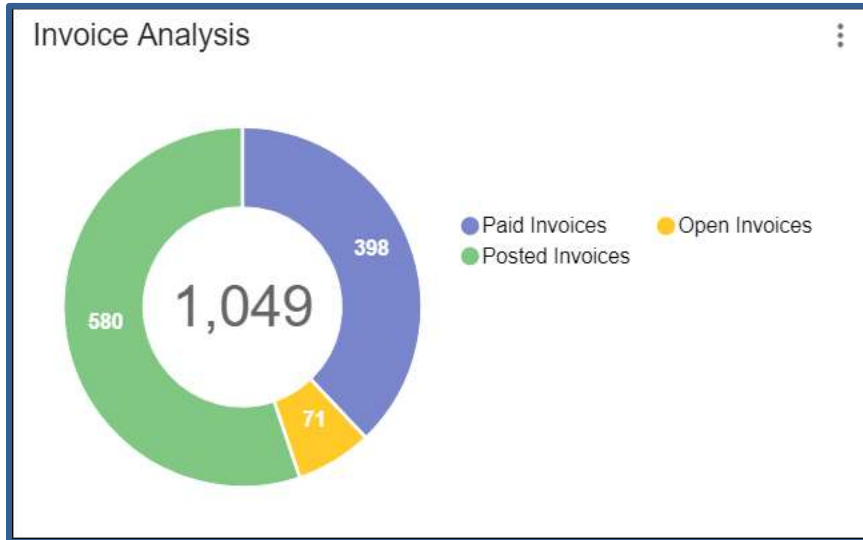
The Document Viewer card allows you to view reports within properly configured cards. When you click Output Data from the More menu on this card, the report downloads directly to the browser tray.



Donut Chart

Card Type: Pie

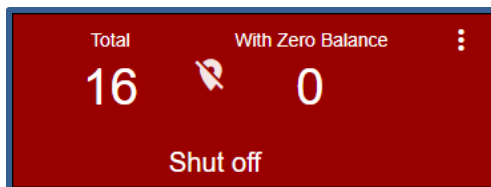
Donut charts resemble pie charts but display graphical proportions of data in arcs.



Double Count

Card Type: Statistic

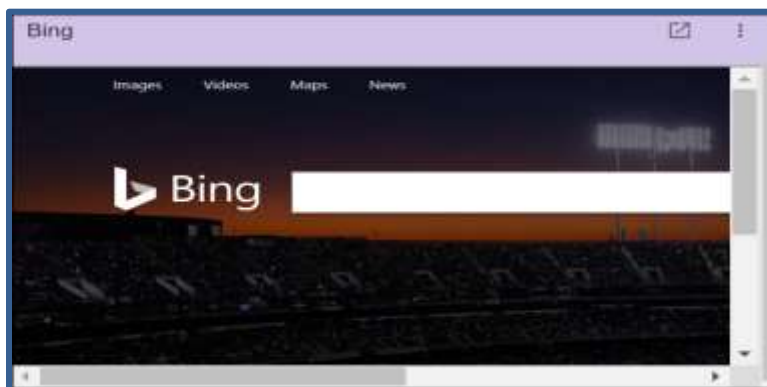
The Double Count card displays two total amounts or numbers. For example, the Shut Off card on the Customer Trending page displays the total number of customer accounts that have been through the shut-off process (16), and the number of accounts with a zero balance (0).



Embedded Source

Card Type: Viewer

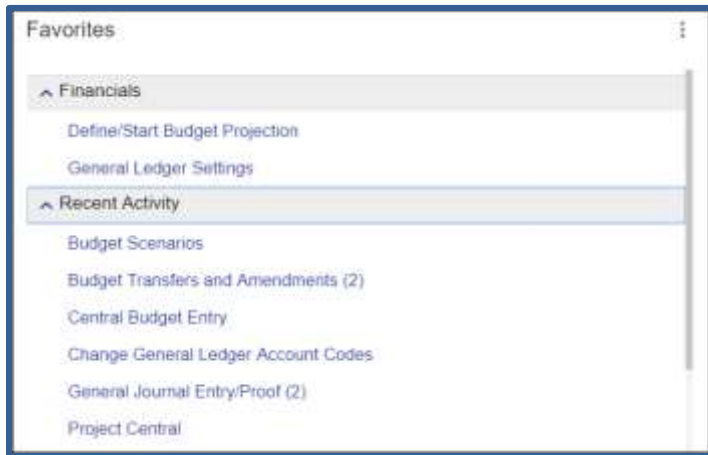
The Embedded Source card allows you to embed a custom URL into an existing page.



Favorites

Card Type: List

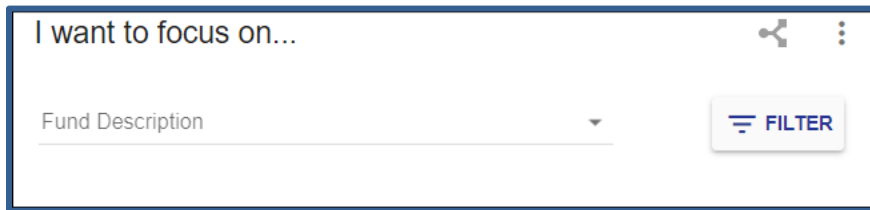
This card displays the current user's favorite programs and recent activity.



Filter Drop Down

Card Type: Filter

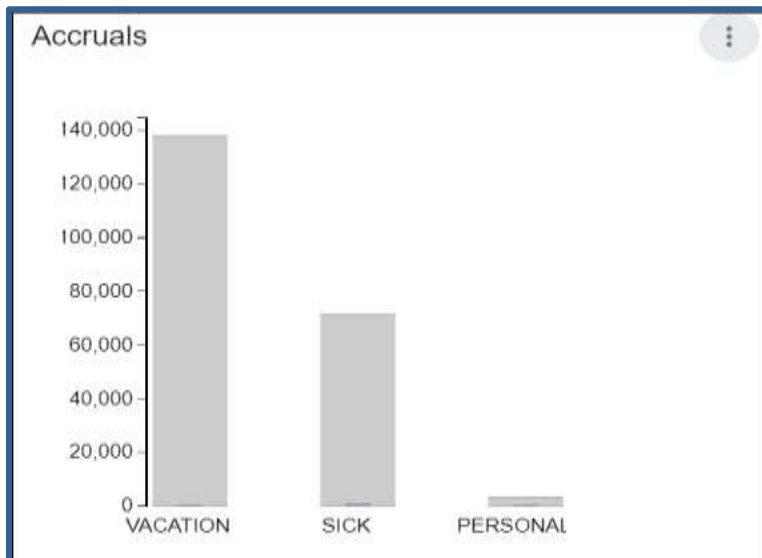
The Filter Drop Down card provides options to apply a filter to the displayed data.



Goal Chart

Card Type: Bar

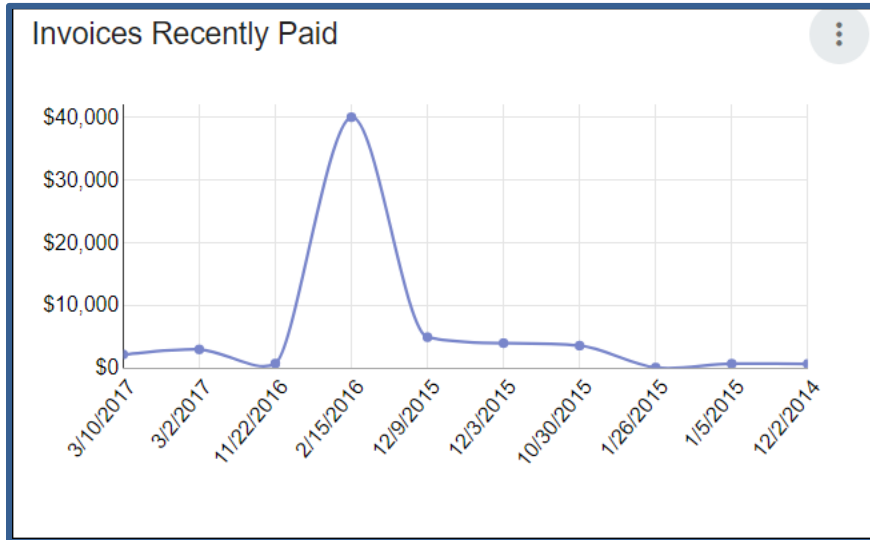
Goal charts show an overall goal, such as an amount, and the progress toward achieving it.



Line Chart

Card Type: Line

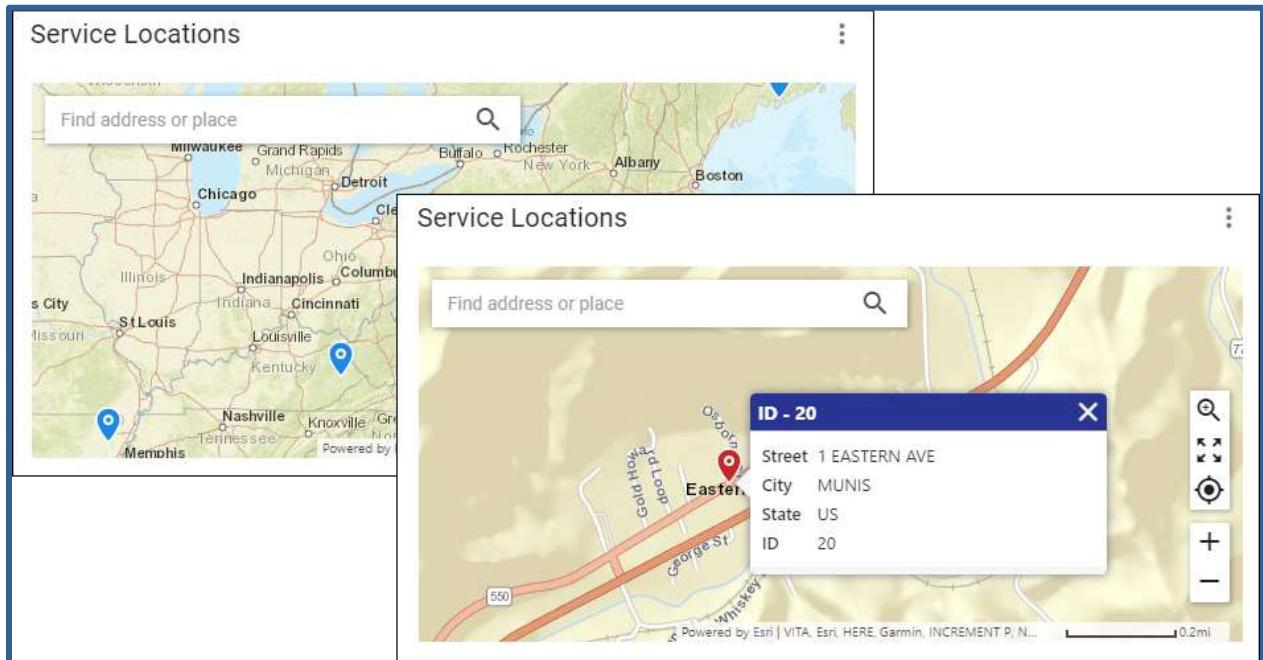
The Line Chart card displays historical trends over time.



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

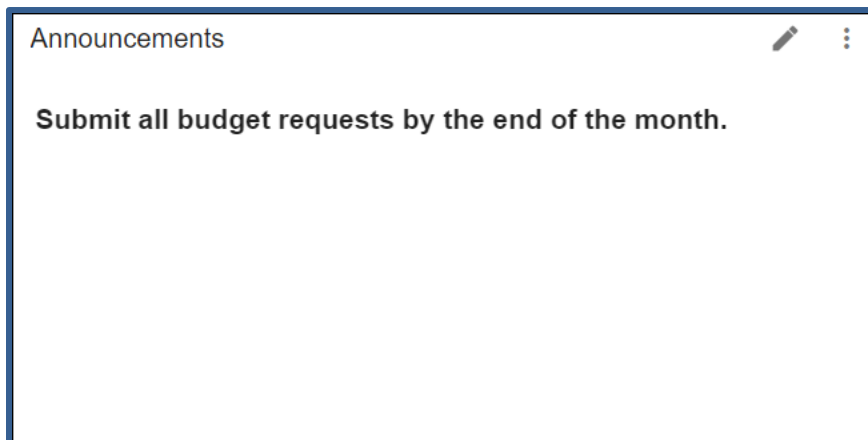
The Media card displays embedded media, such as videos.



Narrative

Card Type: Detail

The Narrative card provides a text box for displaying information and announcements. When text is updated, the card refreshes to display the updated text for all users who have added the card to a page.



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 navigation menu.

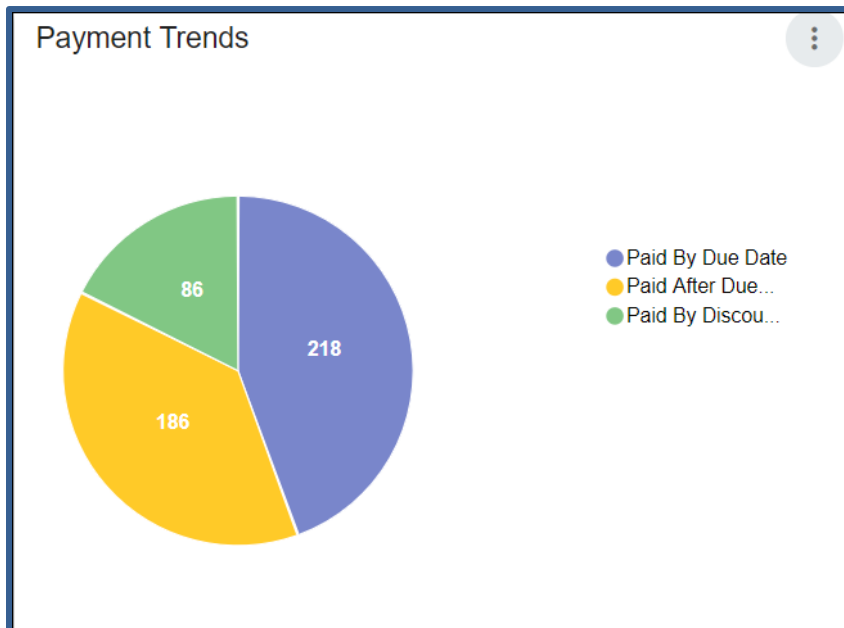
Content Pages

- Asset Maintenance**
 - [Work Order Queue](#)
- Financial Management**
 - [Budget Monitoring](#)
 - [Inventory](#)
 - [Invoice Monitoring](#)
 - [Invoice Processing](#)
 - [Invoice Trending](#)
 - [Purchasing Activities](#)
- Human Capital Management**
 - [Employee Review](#)
 - [Hiring](#)
 - [Payroll Trending](#)
 - [Workforce Trending](#)
- System**
 - [Invoice Trending](#)
 - [Munis Landing Page](#)

Pie Chart

Card Type: Pie

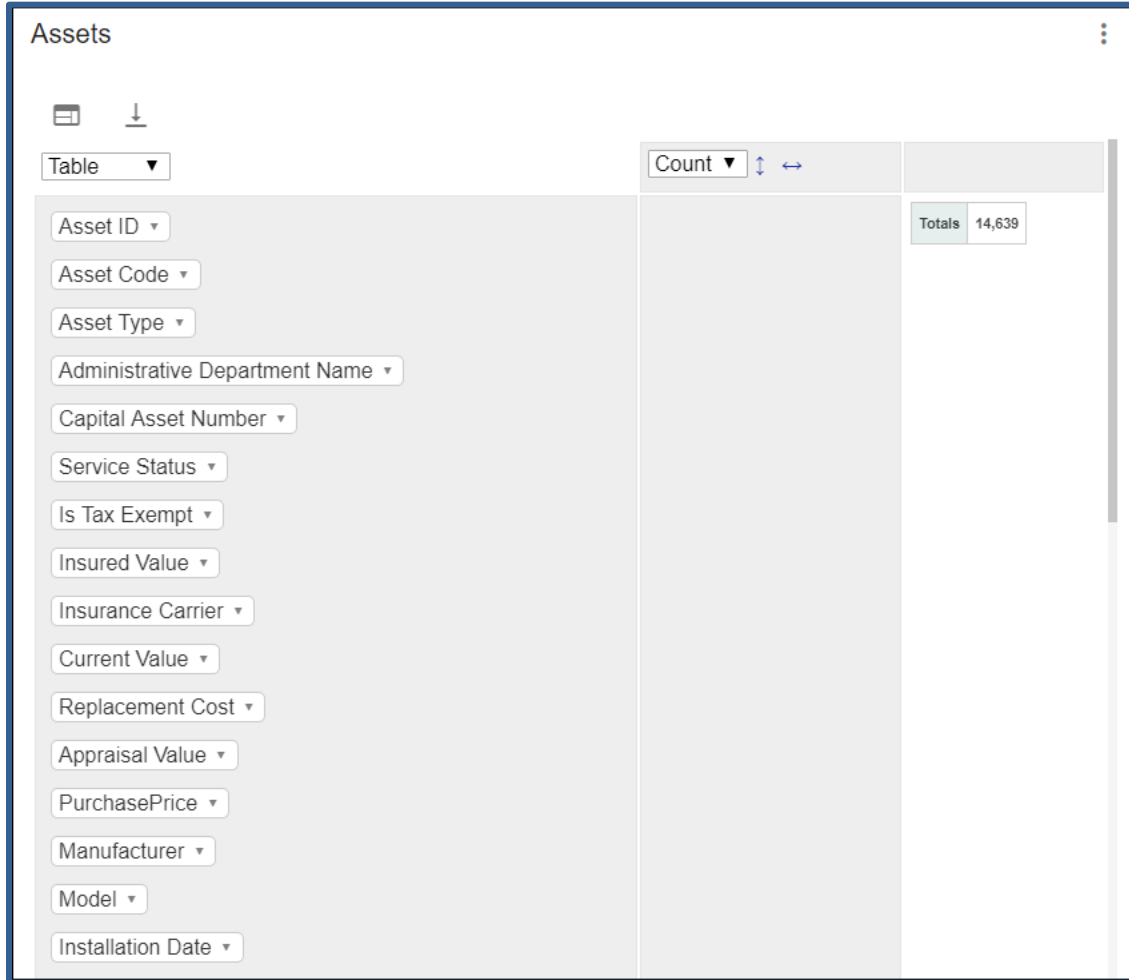
The Pie Chart card shows how the data make up parts of a whole. A legend identifies the different parts.



Pivot Table

Card Type: Detail

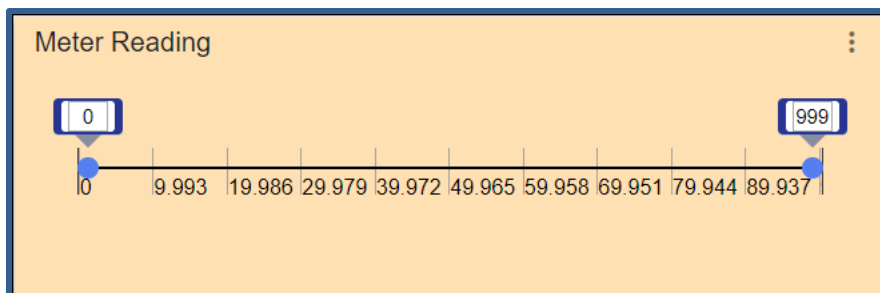
The Pivot Table card displays data in a pivot table format. Using the list values, you can manipulate the data to display different aspects.



Range Slider

Card Type: Filter

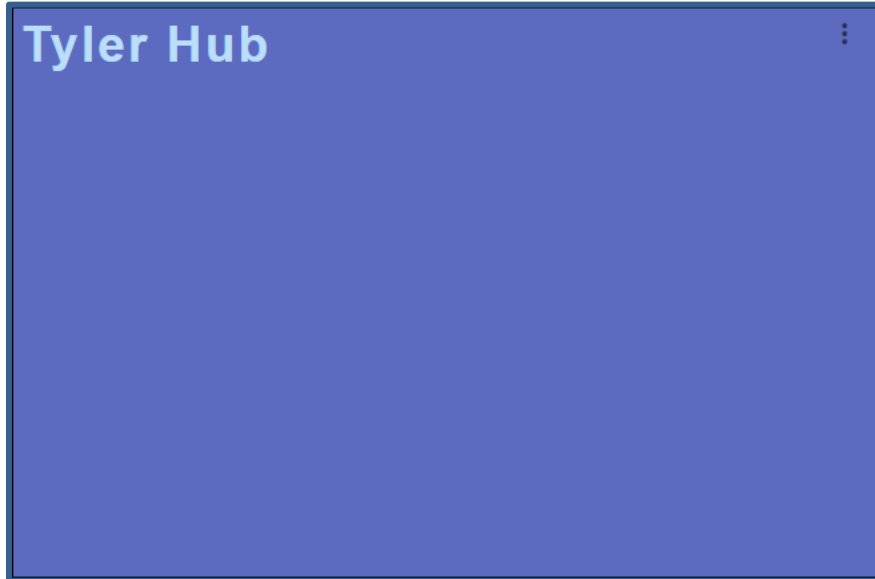
The Range Slider card allows you to filter other cards on the page based on the values selected in the range. Moving the end points of the slider filters the results accordingly.



Site Banner

Card Type: Miscellaneous

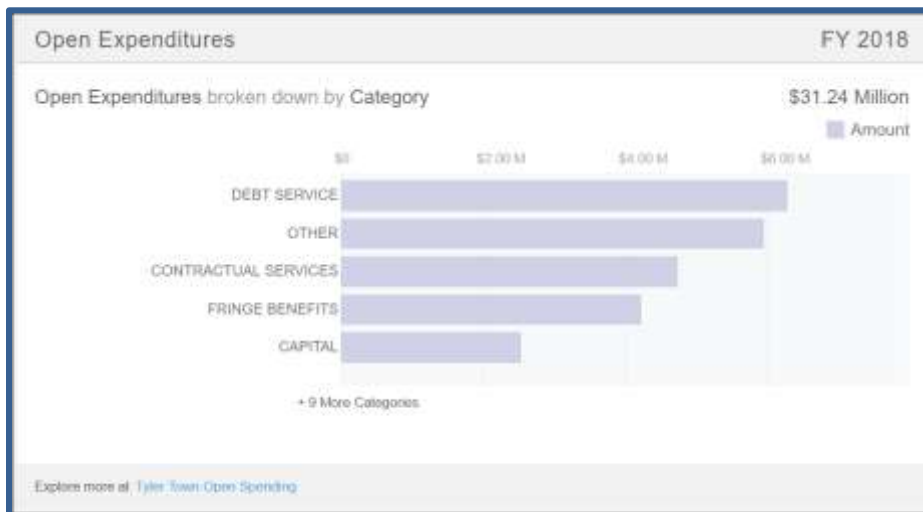
The Site Banner card displays the same text and images, if applicable, used for the sitewide banner.



Socrata

Card Type: Viewer

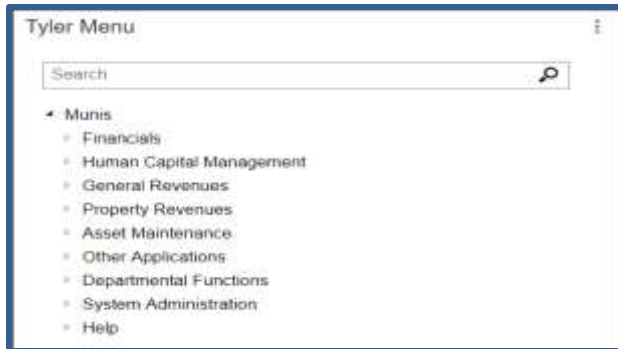
The Socrata card displays embedded data from the Socrata solution, if configured.



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

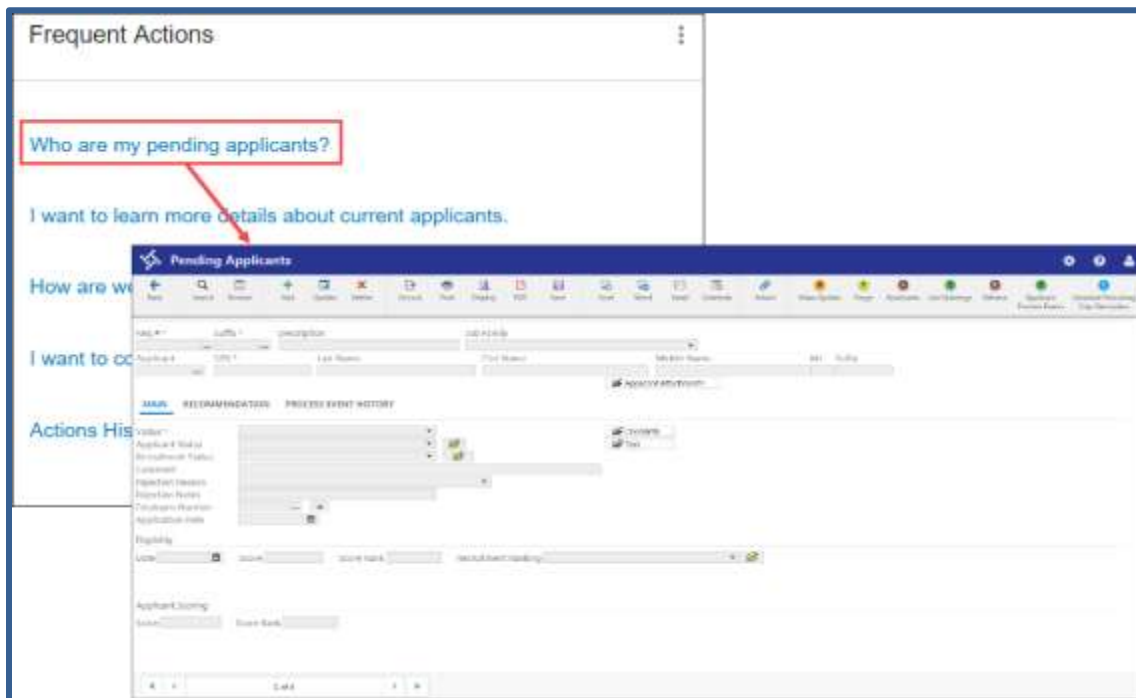
Card Type: List

This card displays the Tyler Menu. For Munis users, this card can be configured to display SSRS reports and/or report applications in the Card Designer.

User Links

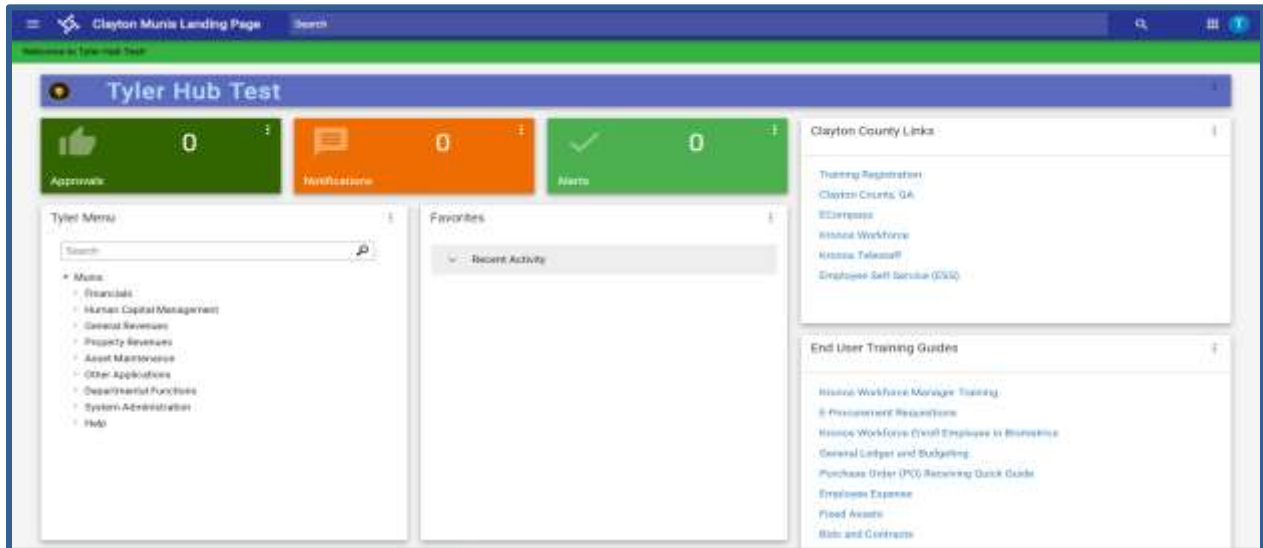
Card Type: List

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



Appendix B—Clayton Munis Landing Page

For Munis users, the **Clayton Munis Landing Page** provides convenient access to Munis resources. This page is commonly assigned to Munis users as the Home page.



This page features **Workflow** cards, the **Tyler Menu** card, the **Favorites** card, the **Clayton County Links** card, the **End User Training Guides** card, and the Tyler Links card.

Workflow Cards

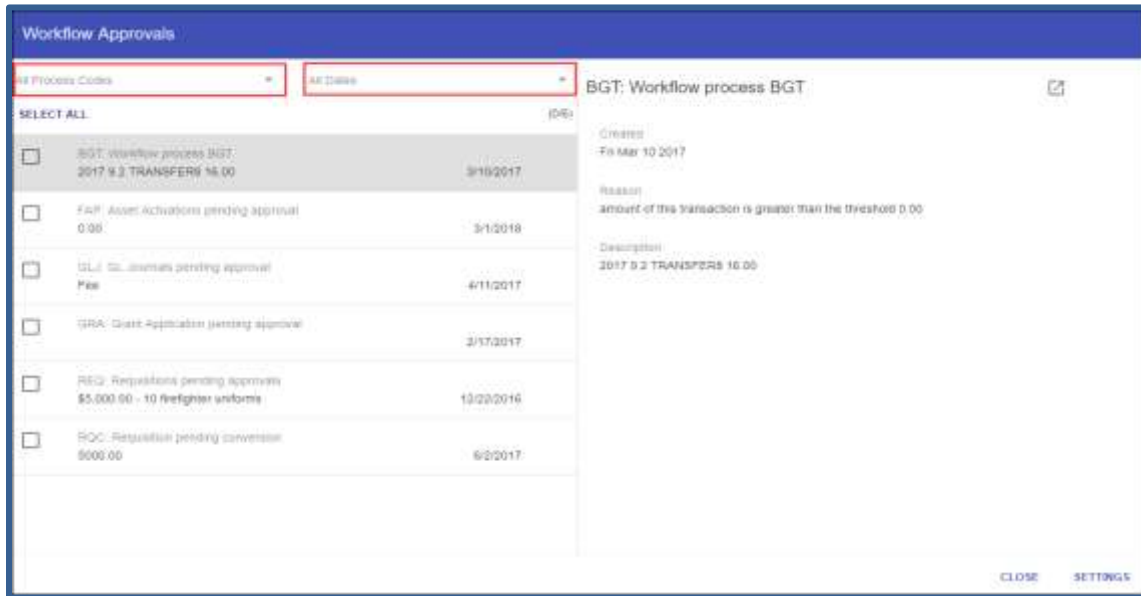
The **Alerts**, **Notifications**, and **Approvals** cards relate to workflow processes.



When you click a card, the system displays workflow data based on your organization's defined workflow business rules. Card contents also vary depending on the selected card:

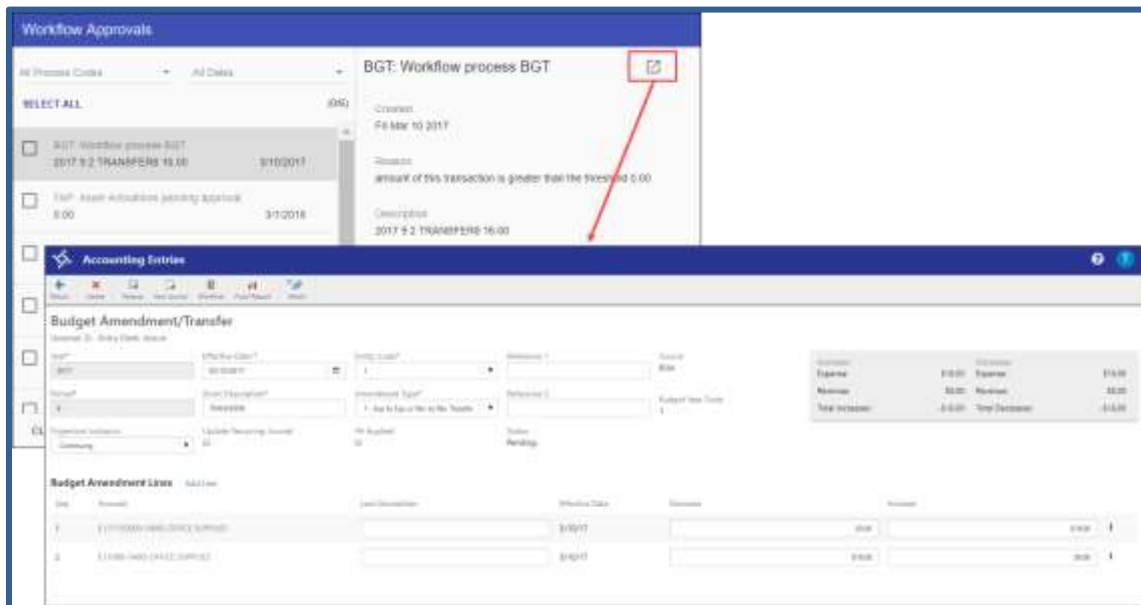
- **Alerts**—Displays alerts related to specific records.
- **Notifications**—Provides notifications.
- **Approvals**—Displays items that are pending approval.

For the **Approvals** card, use the **All Process Codes** and **All Dates** lists to sort the items.



Attachments are indicated by a paper clip icon. When clicked, an **Attachments** dialog box displays a list of attached documents that are available for review.

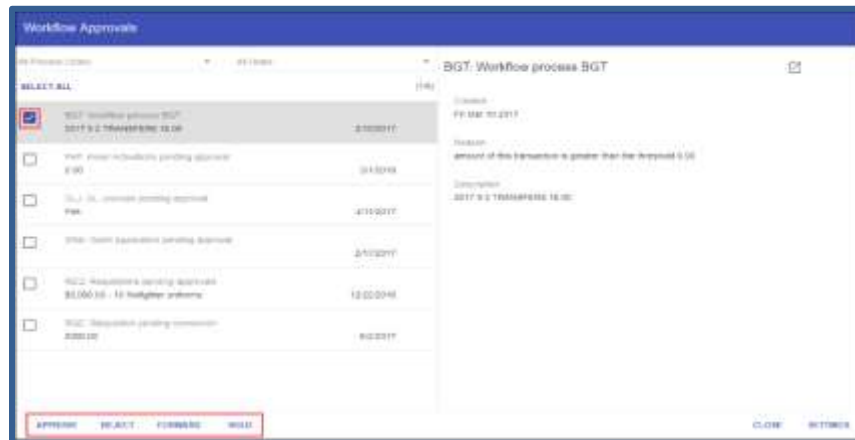
When you click the **Launch** option for a record, the applicable program opens, providing the record details.



Once you have reviewed the record, you can select the check box for that record, and then choose an action:

- **Approve**—Identifies the item as approved and sends a notification to the next approver, if any.

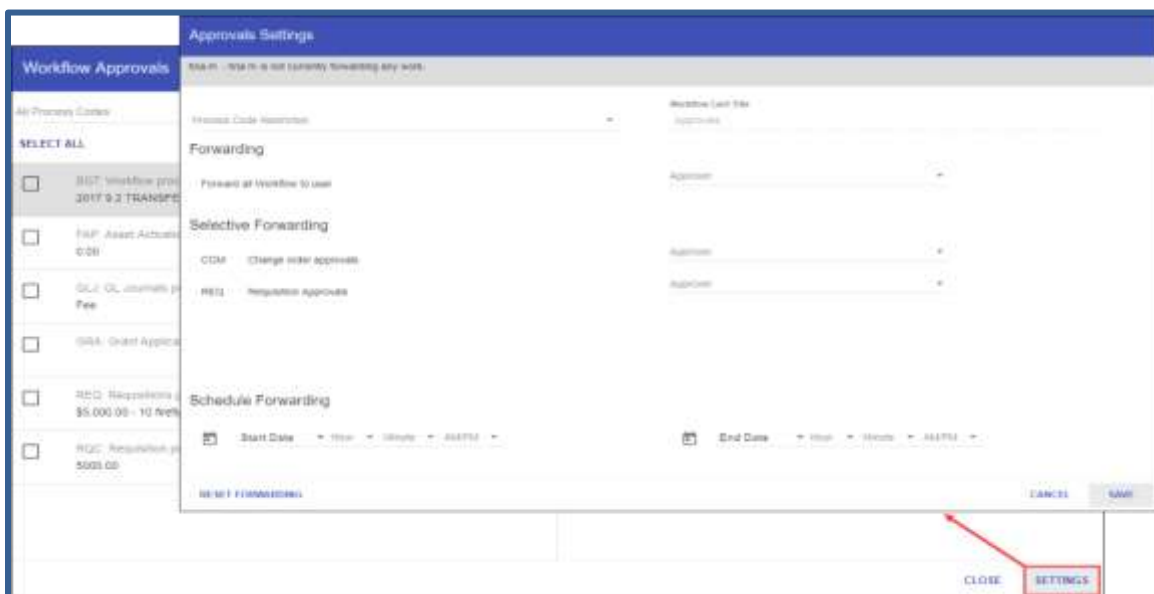
- **Reject**—Rejects the item. You must enter a reason for the rejection. The originator of the record is notified of the rejection and the reason, and can take additional action as necessary.
- **Forward**—Sends the record to another approver to review. If you are receiving forwarded records already, this option is not available.
- **Hold**—Keeps the item in the approval queue, such as when further review is required. The record stays in the queue until additional action is taken.



Note: For the **Notifications** and **Alerts** cards, the available actions are **Acknowledge** and **Dismiss**. The **Select All** option allows you to choose all items and mass acknowledge or dismiss them.

When you choose an action, you can enter a comment in the provided box. The comment is optional for approved items and required for all others. For required comments, enter the reason for the action.

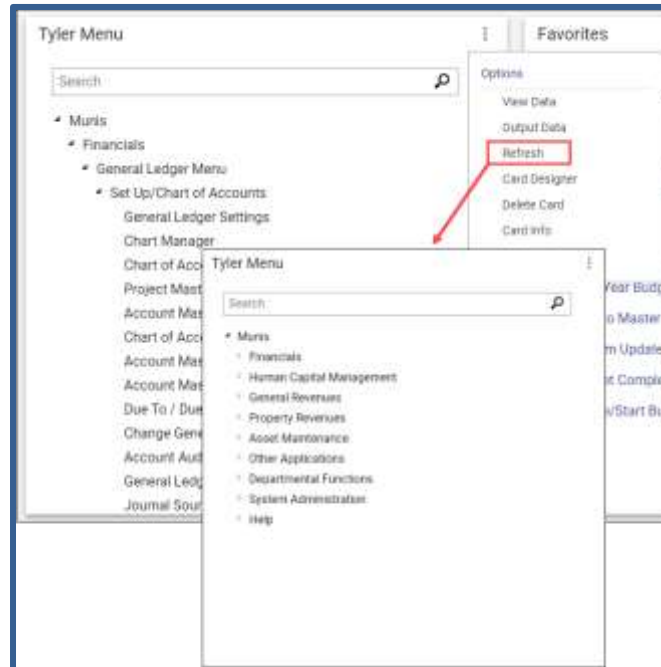
The **Settings** option allows you to maintain workflow settings, such as establishing workflow forwarding and determining how frequently the card refreshes to access data.



Tyler Menu Card

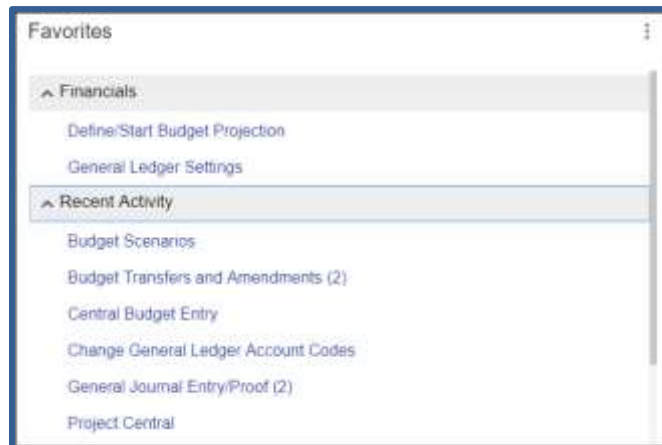
The Tyler Menu card allows you to access the programs in the **Tyler Menu** while retaining access to the other page elements, such as your defined favorite programs and links. This card can be configured to display SSRS reports and/or report applications in the Card Designer.

If you click Refresh from the **More** menu, the Tyler Menu collapses any open menus.



Favorites Card

The **Favorites** card displays the programs you have added to your Favorites menu, separated by category. Additionally, the **Recent Activity** group provides links to the 10 programs you have recently opened, which are automatically generated based on your activity history.



This card provides access to the programs, but you cannot add, update, or delete favorites from the card. To complete these tasks, click the **Apps** button in the **Omnibar** and choose the **Favorites** option.

Tyler Links Card

The Tyler Links card provides links to frequently accessed Tyler Technologies websites, including:

Tyler Search—Provides a resource for searching across several Tyler websites to find relevant documents, online help topics, and Tyler Community posts. You can sort search results by relevance or date, and apply filters to them by source. You can also save your sort preferences to retain them each time you use the search.

Tyler Community—Provides forums where you can ask questions and find user guides, release notes, and supporting documentation for Tyler products, such as Tyler Hub. You must be a member of the Tyler Community group for your specific Tyler product to access the materials and participate in the forum.

Tyler Support—Launches the Tyler Support website, where you can choose your specific Tyler solution to access support resources.

Tyler Tech Web Site—Opens the Tyler Technologies website, featuring information about all the Tyler product solutions, Tyler's philosophy, and more.

