Using Tyler Dashboard with Munis Version 11.3

For more information, visit www.tylertech.com.
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Tyler Dashboard

The Tyler® Dashboard is a web-based application through which you can open Tyler products and other applications. The Tyler Dashboard allows you to share information, view critical processing information, and access daily work from a single launching point. You can customize your personal dashboard using web parts, or if you are a system administrator, you can add web parts that are used by everyone in your organization.

This document outlines the tasks specific to using the Tyler Dashboard with Munis. For more general information on the Tyler Dashboard, see the Tyler Dashboard User Guide, which is available on the Munis KnowledgeBase.

Tyler Dashboard Features

The Tyler Dashboard setting and navigation options manage connections and display features. The Tyler Menu option provides your Munis menu, and the My Favorites list provides easy access to those programs you use most often. The work/display area of the Dashboard displays selected web parts.

Site Search

On the home page, the Search box provides an integrated search tool for the Tyler Dashboard. When you use this option, the search results include records stored in your Tyler menu programs, web parts, and Tyler Community. With additional SharePoint setup, this search feature also searches items stored in your organization's SharePoint directories.
When you use the Site Search option on the main page, the results are sorted into categories and indicate the number of items identified for the defined search areas (Tyler Community, SharePoint, Web Parts, and so on). The Menu results indicate the number of matching results associated with Munis menu.

To change the sort order, click **Sort By** or **Sort Direction** to display the sort options.

**Browse Tab**
When you open the Tyler Dashboard, the Browse tab is the active tab. This tab is the home view for the Dashboard. When you click the Tyler logo from other dashboard pages, the application returns you to the Browse tab.
**Dashboard Tab**
The Dashboard tab provides direct access to Tyler University and the Tyler Community.

To access these resources, your User Profile page must be completed with your Tyler user ID and password.

If you select an option in the Tyler University or Tyler Community group and your profile is not complete, the program displays a login page. If you do not have access to the User Profile setting, contact your system administrator for assistance in completing this setup.
**Tyler University**

Tyler University provides training resources for Munis and Tyler products. These resources include a mix of tutorials and documentation.

The Tyler University options include Enroll, My Courses and My Transcript. Use the Tyler University options to manage your personal training for Munis and Tyler products.

When you click **Enroll** in the Tyler University group of the ribbon, Dashboard provides a list of defined curricula for core and end users of Munis and Tyler products. Each option includes the resources available to complete the eLearning curriculum for that product area.

To enroll in a specific curriculum, select the check box and click **Enroll**. The page provides a confirmation next to the Enroll button.

Once you are enrolled in a curriculum, click **My Courses** on the ribbon to display the list of the eLearning resources available for that curriculum. The list also includes courses that you have
completed, that are currently in progress, or in which you have previously enrolled.

The Status indicator displays your progress for a particular course.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not Started</td>
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<td>In Progress</td>
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<td></td>
<td>Completed</td>
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<td>Passed</td>
</tr>
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<td>Failed</td>
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</tbody>
</table>

Click **Launch** to open an eLearning course or click the course title to display a summary page for the course.
The summary page includes a discussion board and a document library for the identified course. This page is specific to your organization, allowing you to share information with colleagues.

To open the eLearning course from the summary page, click Launch Course Material. Click Withdraw from Course to cancel your enrollment.

**Tyler Community**
The Tyler Community option provides direct access to the Tyler Community, where you can search, post, and access Tyler Community items directly from the Tyler Dashboard. Use the community to search and share information related to your Munis products.

Prior to using the Tyler Community links, you must create an API key to verify your identity when you select Tyler Community options. To create an API key, click Identity in the Tyler Community group of the ribbon, and then follow the instructions provided.

- Search—Provides search functionality specific to Tyler Community items.
- New Posts—Allows you to enter a question or discussion item to the Tyler Community.

![Tyler Community New Post](image)

- Favorites—Provides quick access to the list of favorites that you have created within the Tyler Community application.

![Tyler Community Favorites](image)

**My Tyler**

The My Tyler menu provides access to the integrated Tyler University pages (My Courses, My Transcript, and Enroll) and the Tyler Community pages (New Post, Search, and Favorites).
Views
Views are personal dashboard views that you create to match your work requirements. For example, if you often access Munis payroll programs, you could create a view that includes web parts and program favorites specific to payroll processing.

The Home view is the default view for the Dashboard. When you click the Tyler logo from your user-defined views, the Dashboard returns to the Home view. You cannot delete or modify the settings for the Home view.
To create a view:

1. Click **Views** in the Dashboard header.
2. Click **Edit Views** to display the Edit Views dialog box.

3. Click **Add View**.
4. In the Edit View dialog box, enter the name of the view in the Name box.
   The default value for the Location box is Next Available and you cannot change this.
5. Click **Save View** to save the view and return to the Edit Views dialog box.
6. Add additional views, as appropriate.
7. In the Edit Views dialog box, click **Save Views**.
   The program refreshes the Dashboard to include the view on the Views menu.
8. Select the view to refresh the Dashboard with a blank work area.

9. With this view active, add the appropriate web parts and favorites to complete the view.

10. To return to the Home view, click the Tyler logo or select Home from the Views menu.
Munis Menu
To display your Munis menu, click **Tyler Menu** in the Dashboard header.

When you complete a search from the Tyler menu, results for multiple instances of the same program are summarized. For example, if there are two instances of an identical Employee Master program on your Tyler menu, the search results display Employee Master (2). If the program name you enter as search criteria is included in names for similar programs, the search results display the name for each program. In the example for Employee Master, the search results would
also include Projection Employee Master, Terminated Employee Master, and so on.
**My Favorites**

My Favorites manages the programs, websites, or other applications that you frequently access. Using the My Favorites option, you can define categories that meet your work requirements and then assign programs to those categories.

To customize your My Favorites options, click **Edit Favorites** on the menu, and then in the Edit Favorites dialog box, click **Add Category**.

In the Add a Category dialog box, define a category name and click **Save Category**.
To add a favorite, click **Edit Favorites** on the menu, and then in the Edit Favorites dialog box, click **Add Favorite**.

Use the Add a Favorite dialog box to select the category and define the program name and applicable executable or URL. When you click **Save Favorite**, the program is available in your My
Favorites menu.

The Edit Settings options on the Edit Favorites dialog box provide additional options for personalizing your dashboard.

Use these options to remove the My Favorites or Recent Activity options from your menu and to specify the number of items returned when you complete a search.
Web Parts
Web parts are web-based portals that display information from your Munis products. The Web Parts setting adds, removes, and arranges the web parts that are available on your personal dashboard.

To add a web part:

1. Click **Web Parts** in the Dashboard header.

2. In the Manage Personal Web Parts dialog box, select the Munis tab and expand the list of available web parts for a Munis product.
3. Highlight the web part to add and drag it to the Header, Left, or Right position box.

To add a web part tile, highlight the web part name and drag it to the Left Tile or Right Tile placement location.

4. Click **Update** to save the web parts to your dashboard.
   On the dashboard, standard web parts display the data as defined; for web part tiles,
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click the tile to display the full web part.

5. To hide a web part from view or to remove a web part, open the Web Part Maintenance page and right-click the web part to display the Close and Delete options.

6. Click Close this Web Part or Delete this Web Part, and then click Update.

Use the Show Shared Web Parts and Show Personal Web Parts buttons to refresh the dialog box to display the personal view (your personal web parts) or shared view (web parts assigned
and shared within your organization).

Shared web parts are web parts that display for all users. Sharing web parts creates a default user view with web parts that individual users cannot remove. Only system administrators can manage shared web parts.
To add shared web parts:

1. In the Manage Web Parts dialog box, select the **Show Shared Web Parts** option.

2. Navigate to the web part to add and drag it to a position box. When you save the change, the web part is available in the shared view.

For more information on available web parts, see *Tyler Dashboard Available Web Parts for Munis*, which is available in the Munis KnowledgeBase.