# Tyler Hub

*User Guide*
*Version 2021.1*

For more information, visit www.tylertech.com.

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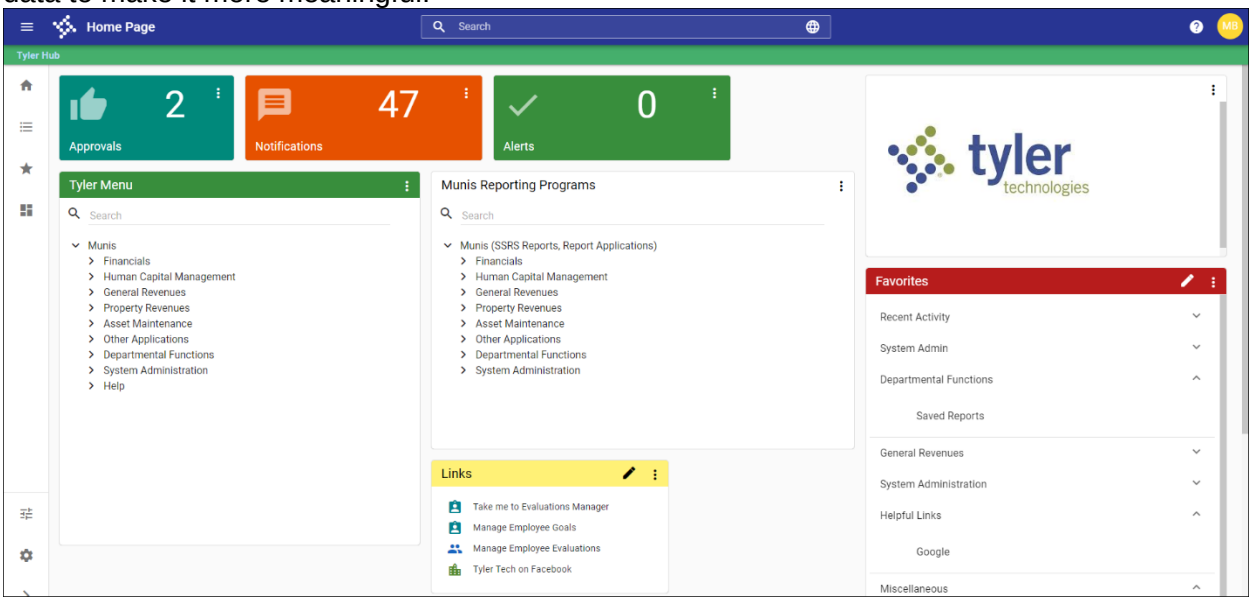
# Introduction

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



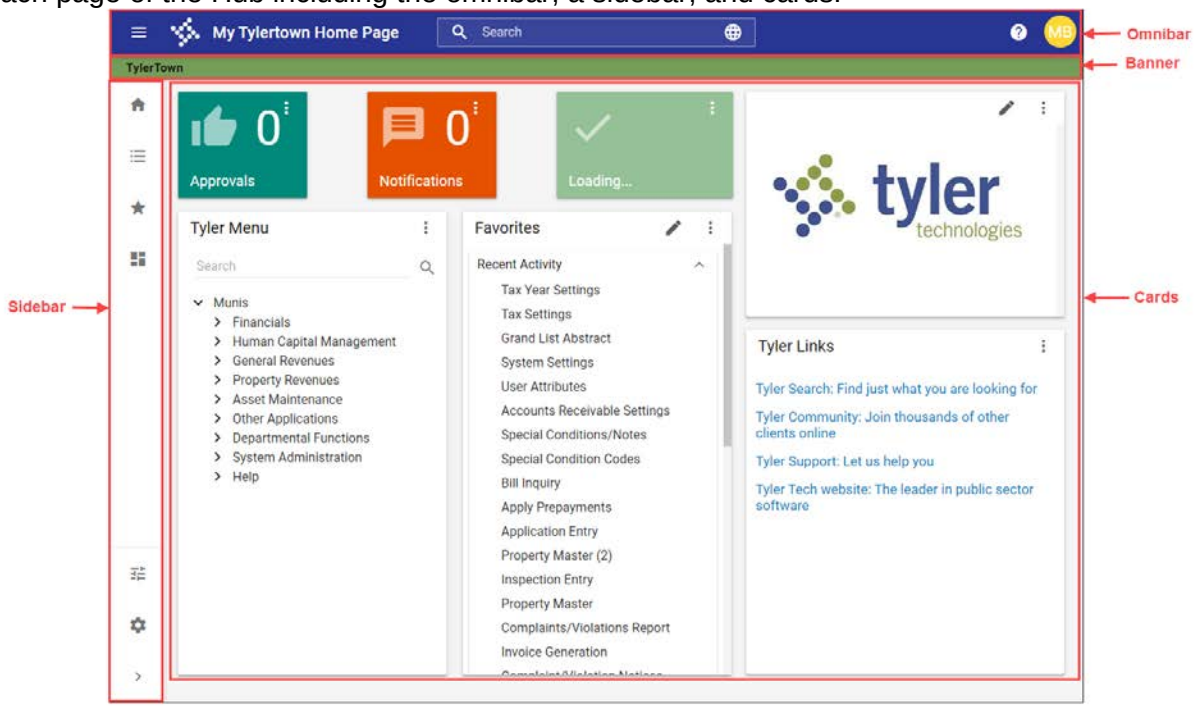

The *Tyler Hub User Guide* provides basic descriptions and procedures for using the Tyler Hub. The examples provided in this document are based on using Tyler Hub with Munis; the functionality is the same when you are using Tyler Hub with your Tyler product.

The features and options provided within Tyler Hub are available according to your user permissions. If you are unable to see an option or complete a task, see your system administrator to update your permissions.

Additional Tyler Hub documentation is available in the Tyler Hub group of the Tyler Community.

# Tyler Hub

Throughout the application, Tyler Hub shares similar characteristics and features. For example, each page of the Hub including the omnibar, a sidebar, and cards.




## Omnibar

The omnibar includes the Menu button, the Tyler logo and page name, the Search box, the Help button, and the User Information option.

### Menu Button, Logo, and Search

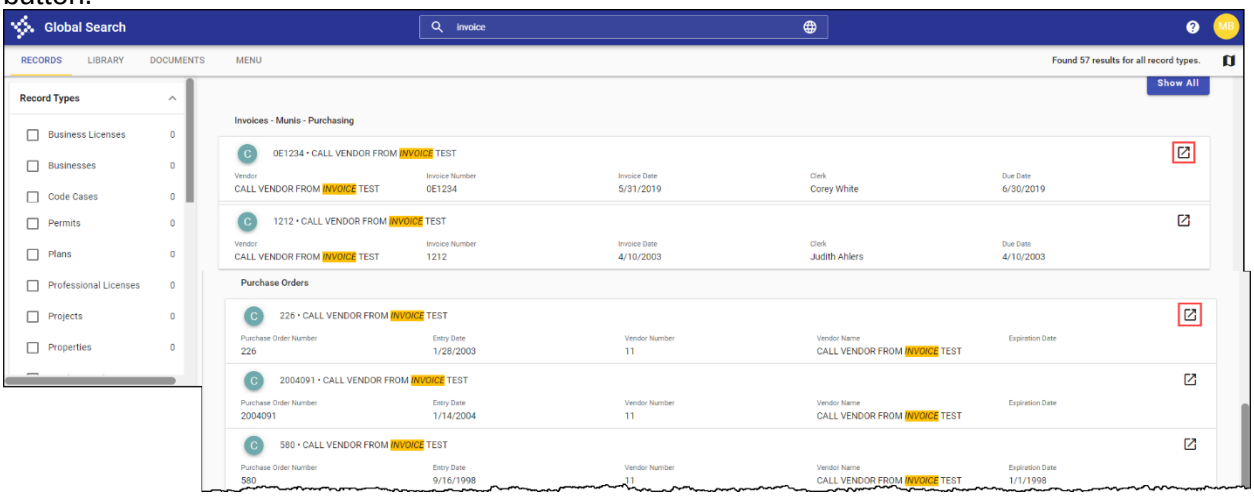
The Menu (☰) button expands or collapses the sidebar, which contains your options for using and maintaining the Hub. See the Sidebar section for more information.

The Tyler logo and page name refreshes the screen to display your Home page.

The Search feature searches the Hub and integrated systems using user-defined keywords or other search criteria.

For Munis users, entering a forward slash (/) in the Search box provides a list of actions that you can complete directly from the Hub. These actions are associated with the source program for the related product.

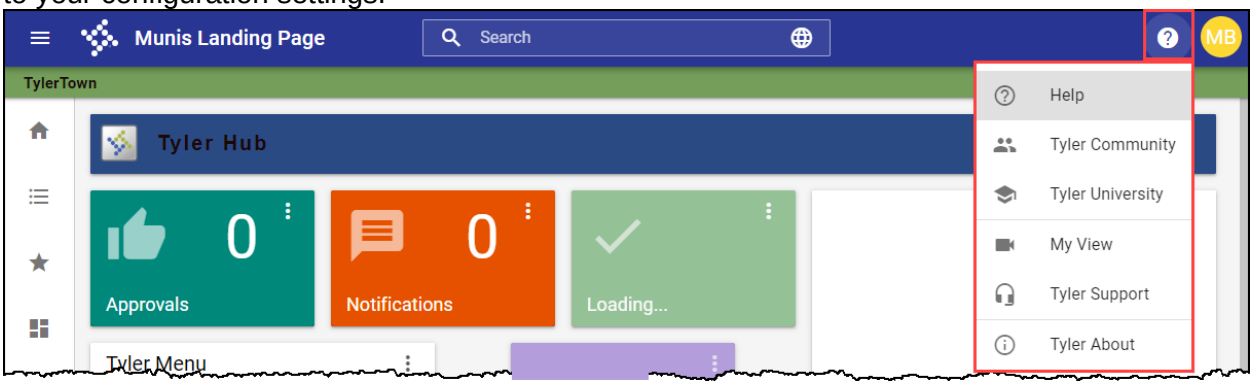
When you manually enter search criteria, the program displays applicable results from menu programs, records, and Tyler Hub content. The program presents the results as individual cards on the page. Results are restricted to five records; to show all matches, click the Show All button.




- For results in the Records tab, use the Record Types, Product, and System options to reduce the available records. Click the Launch (⧉) button on a card to open the source program or record. If the record is associated with a specific location, click the Map button (🗺) to display a map identifying that location.
- To review all content that applies to the search criteria, click the Library tab. On this tab, you can sort records by content type, Tyler-endorsed content, or functional areas.
- For documents stored in Tyler Content Manager (TCM), click the Documents tab.
- To review records associated with your current menu programs, use the Menu tab. In this case, you can sort by system (that is, Munis, ReadyForms, EnerGov, and so on). Click the Launch (⧉) button to open the source program.

## Help

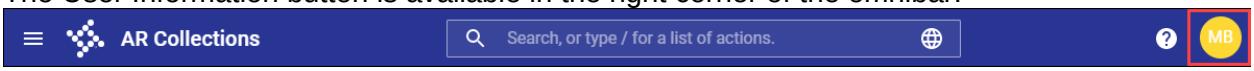
The Help button provides a menu of Tyler Hub resources, including Help, Tyler Community, Tyler University, MyView, Tyler Support, and Tyler About. These options are available according to your configuration settings.




- Help provides access to Tyler Hub online help.Within the help application, use the Contents pane to navigate to specific topics for more information or use the Search feature to define criteria to locate matching results.
- Tyler Community is a user-driven support community that provides user forums, product documentation, resource pages, and opportunities to submit product suggestions. Tyler Community is accessible from your Tyler product client support page. To join a group, select the product from the menu (for example, Tyler) and select the group to join.
- Tyler University provides access to e-learning courses offered through Tyler U. When you select Tyler University from the Help menu, the courses are presented on two tabs: Learn About… and Prerequisites.
    - The Learn About… tab contains all the available Tyler University courses. Enter your criteria in the search bar to search for classes by subject or click the arrow to expand a topic and view courses relating to that subject.
    - The Prerequisites tab contains a checklist of courses that are designed to help new users get started with the programs. A progress bar indicates the percentage of courses that have been completed. Completed courses are crossed out.
- MyView captures video of a process to include with an incident submission to Tyler Support.
- Tyler Support opens the Tyler Client Support website where you can choose your Tyler product and request access to live support or online support incidents.
- Tyler About provides information about the installed version of Tyler Hub and any integrated Tyler systems. For the Hub entry, click the Information button to show or hide the build stamp associated with your version. Click Refresh to update the Hub and all the external systems' versions.

## User Information

The User Information button is available in the right corner of the omnibar.

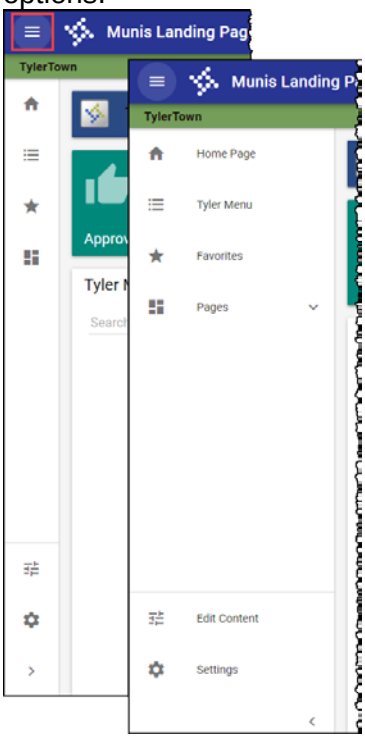



Clicking this button identifies the user who is currently logged in through Tyler Identity. An option to sign out is also available. If you sign out from Tyler Hub, you must enter a valid Tyler Identity user name and password to sign in again.

The Show User Initials setting in Administration determines if the User information button displays as an icon or displays as the initials of the current user.

## Sidebar

The sidebar provides the options for working within Tyler Hub. The Menu button controls how the sidebar displays. When you click this option, Tyler Hub expands the sidebar to display the menu names for the Home Page, Tyler Menu, Favorites, Pages, Edit Content, and Settings options.




- The Pages group provides access to all the pages that have been added to your Tyler Hub instance. An administrator may have assigned these to your user role, or you may have added them during the onboarding process. Only the pages that have been added for your user role are available in this list.
- The Edit Content group provides options to edit content and page layouts if appropriate permissions have been assigned to your user role. If you do not have the proper permissions assigned, these options are not available.
- The Settings option provides the Administration, Publish Page, and User Settings options. The Administration option is only available if your user role has been granted permission to access the Tyler Hub Administration page. The Administration pages are typically restricted as these pages contain system configurations.

# Pages and Cards

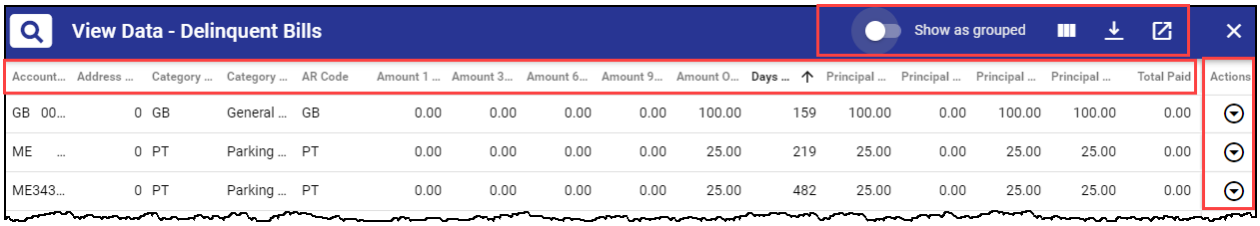
Tyler Hub is comprised of pages that focus on task-based themes. In turn, these pages are comprised of cards that provide content-specific data. See the Pages section for more information.

- Pages are available from the Content Library or you can create custom pages to combine cards and data relevant to a specific information area or solution.
- Cards are also available from the Content Library or can be created to focus on a specific information area of your choosing.

The Pages group of the sidebar features links to all the pages that have been added to your Tyler Hub. A page contains cards grouped around a task-based theme. The page groupings in the sidebar are controlled by the Group Pages By setting defined in User Settings.

To view a page, expand the Pages group on the sidebar, and then click the available page. The selected page remains the active page in your Tyler Hub until you click the Home Page button on the sidebar to return to your Home page.

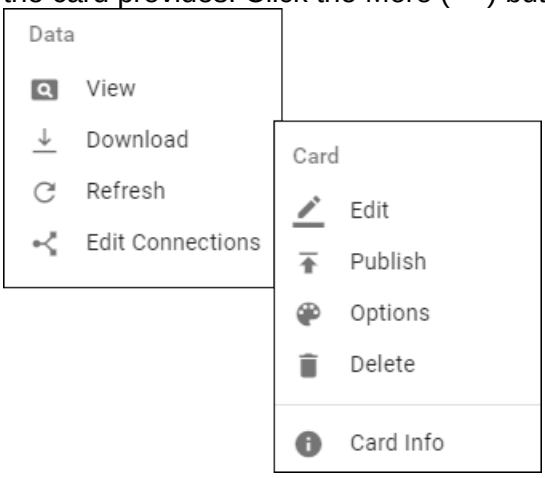
Cards included in pages can include various filter, download, or action options, depending on the card type. See the View section for more information.




Use the Page Layout feature within the Edit Content sidebar option to update the presentation of cards on a selected page. See the Page Layout section for more information.

# Card Context Menu

On an individual card, the context menu presents options for viewing or managing the data that the card provides. Click the More ( ⋮ ) button on a card to access the context menu.



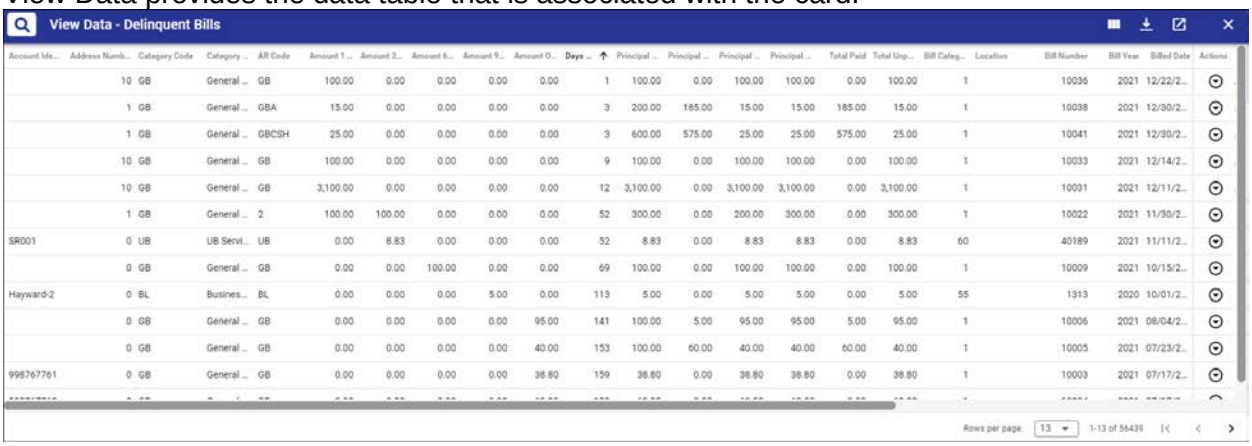

The Data group of the context menu provides options for managing the data that supports the card and the Card group provides options for managing the card format.

## Data

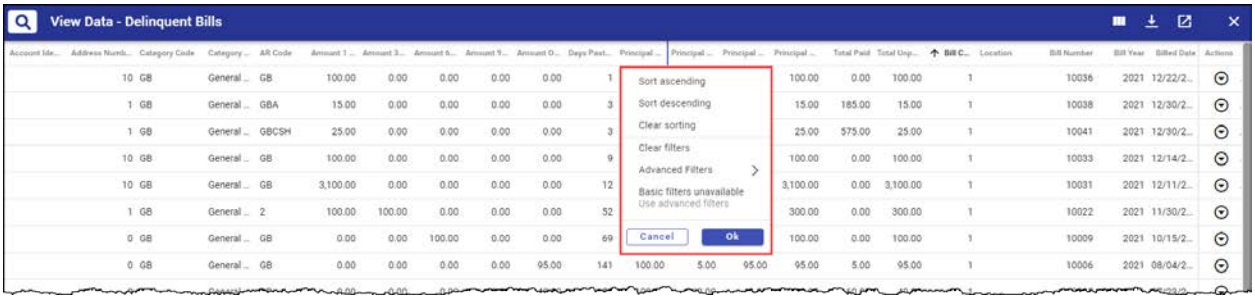
The Data group includes the View, Download, Refresh, and Edit Connections options.

### *View*

View Data provides the data table that is associated with the card.



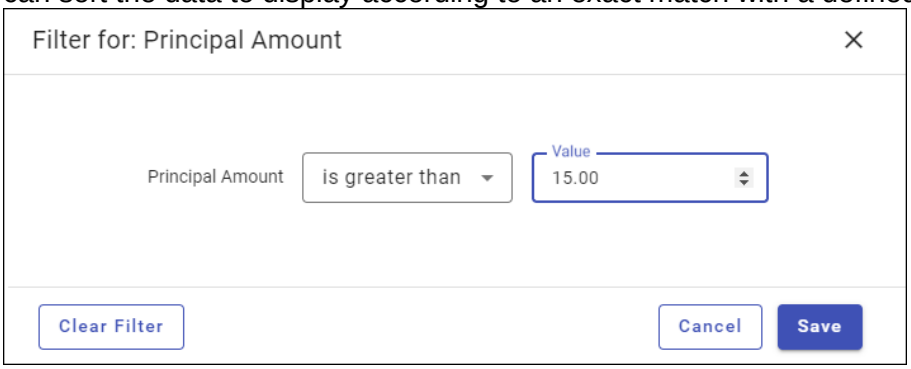

On the View Data screen, use the column header filtering options to define how the table presents the data. When you click a header, the program displays a sorting and filtering dialog box.




- Use the Sort Ascending, Sort Descending, and Clear Sorting options to apply or remove the sort order for a column.
- Use the Clear Filters, Advanced Filters, and Basic Filters to define or remove specific criteria for the display. (For numerical or date columns, the Basic Filters option is not available and the dialog box indicates to use advanced filters.)

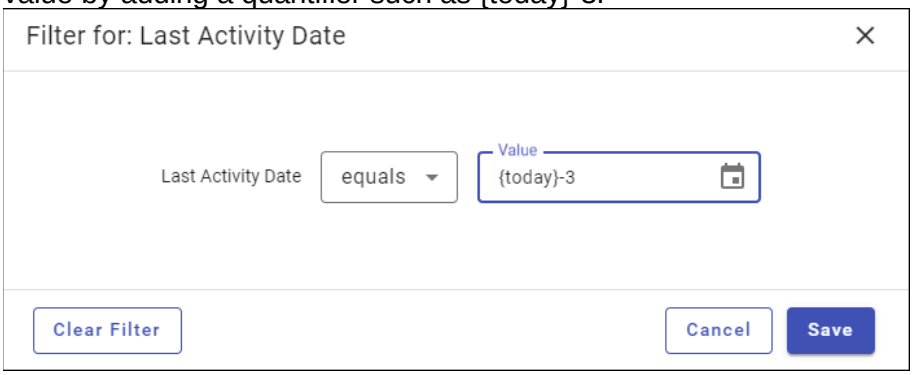
When sorting or filtering is in place, the column headers include the filter button to indicate filtering and up or down arrows to indicate sorting.

Using the Advanced Filters option, you can refine the data using quantifiers. For example, you can sort the data to display according to an exact match with a defined value.



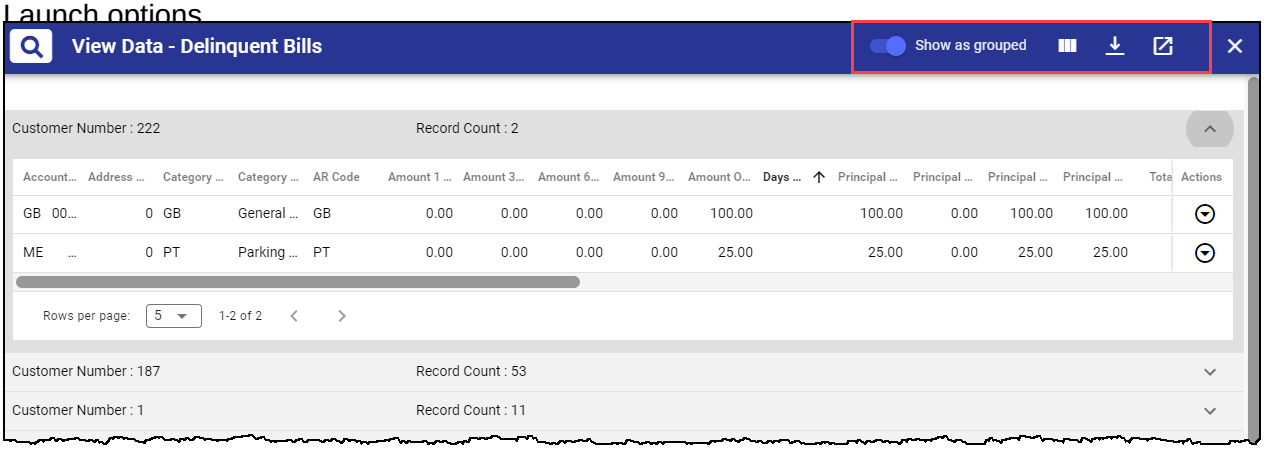

Depending on the type of data, the filter dialog box may also provide a list of distinct values that are available for filtering. In this case, you can select one or more distinct data values for filtering. When there are more than 50 available values, the dialog box provides a Show More option. Clicking Show More loads the next 50 distinct values.

For fields that include relative values such as today, month, or year, you can manually update the field to adjust the value. For example, for the relative value of Today, you can adjust the value by adding a quantifier such as {today}-3.




In this case, the results include data from three days prior to today.

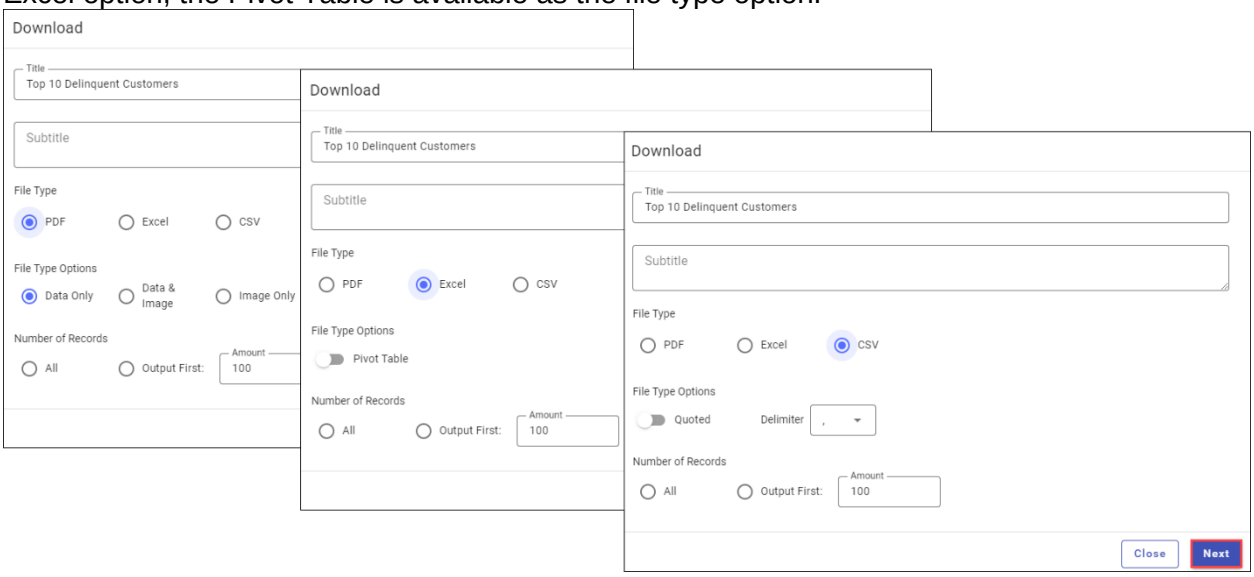
The View Data banner includes the Show as Grouped, Show/Hide Columns, Output Data, and Launch options.



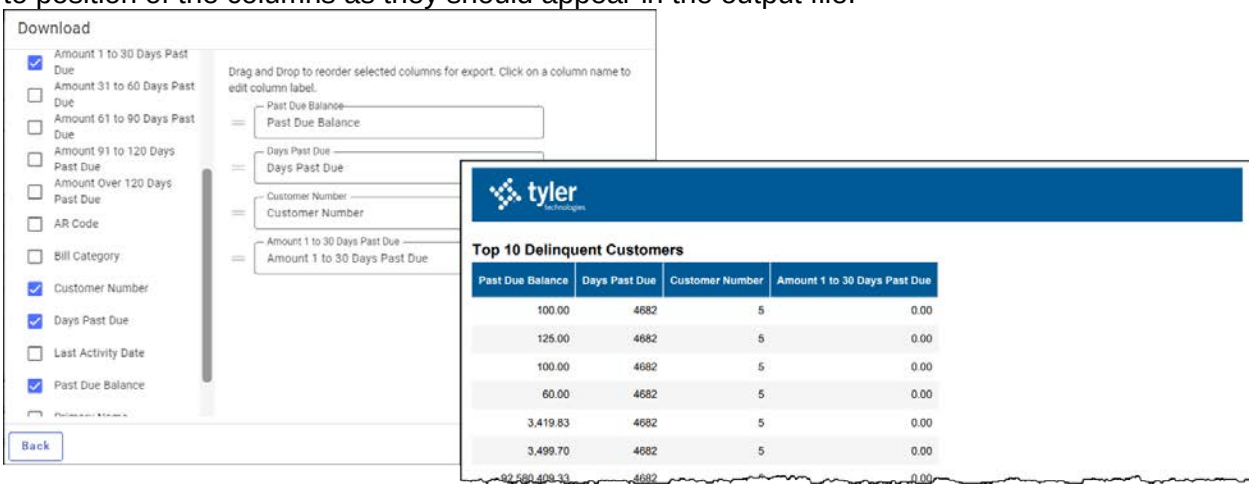

- Show as Grouped—Groups data according to the Group By setting in the Card Designer. When this option is enabled, the data is presented in groups. In this case, expand the data to view the details within a group. When this option is not enabled, the data presents without group organization.
- Show/Hide Columns ( )—Presents a list of data columns; select or clear check boxes to determine the columns that display.
- Output Data ( )—Creates a download file of the selected data. Use the Output dialog box to define the output file type. Once the file type is determined, you can further define options according to the selected file type. See the Download section for more information.
- Launch ( )—Presents the data in a new window that you can resize and move to new locations on your computer.

### *Download*

Download creates a PDF, Excel, or CSV file for the defined data. Once you select the file type, the File Type Options update to provide options for presenting the data. For example, for the Excel option, the Pivot Table is available as the file type option.




Clicking Next provides additional filtering for the data to export. Select the check boxes for the data columns to include, update the column labels if required, and then drag-and-drop the fields to position of the columns as they should appear in the output file.




### *Refresh*

Refreshes the data that displays. When you first open a card, the data is current. If the card remains open, use the Refresh option to update the data to the most current.

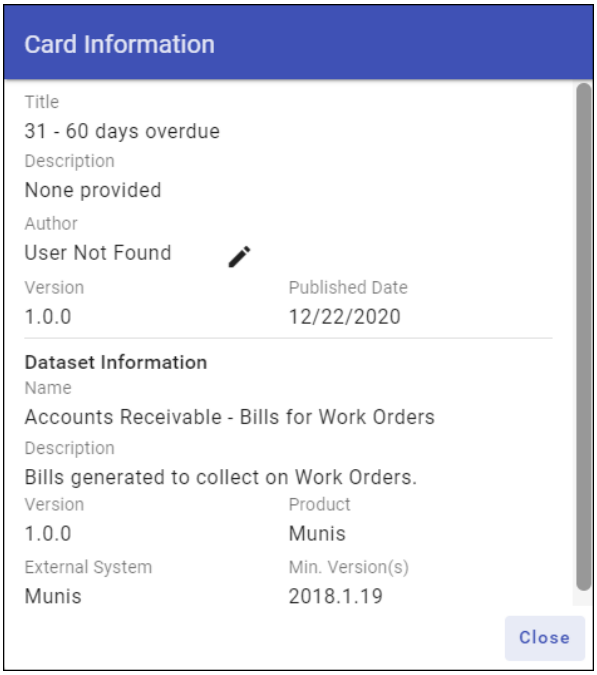
### *Edit Connections*

Presents Connection Builder, which creates data connections between cards. Using this feature, you can make data available by identifying multiple receiving cards for a single origin card. See the Connection Builder content for more information.

## Card

The Card group includes the Edit, Options, Delete, Visualizations, and Card Info options.

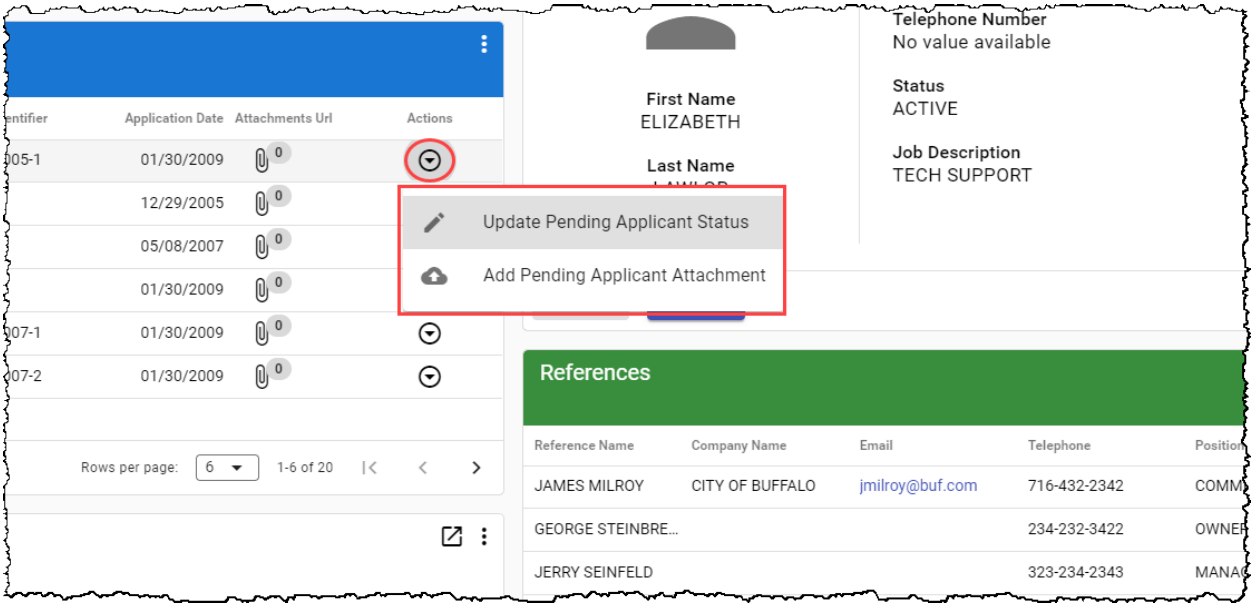
- Edit—Opens Card Designer where you can modify datasets, fields, and filtering. See Card Designer for more information.
- Publish—Publishes the card to the content library to make it accessible to others in your organization.
- Options—Sets color and automatic refresh intervals. Refresh intervals can be overwritten by system administrators; in this case, if you attempt to reset a refresh rate, you receive a warning and your change is not accepted.
- Delete—Removes the card from your page. It does not remove the card from the Content Library.
- Visualizations—Provides the different visual presentations (for example, charts) available for the data presented by the card. Changing a visualization only changes the presentation for you; it does not affect others who have the same card. Visualization options vary according to card types; for some card types, this option is not available.
- Card Info—Provides detailed card information, including title description, version, data retrieval date for the card. For each dataset contained in the card, the Card Information dialog box provides the name, description, version, external system, product, and minimum version or versions required for inclusion. If applicable, the Edit button is available for the Author field. Click Edit to select an author from the list provided.



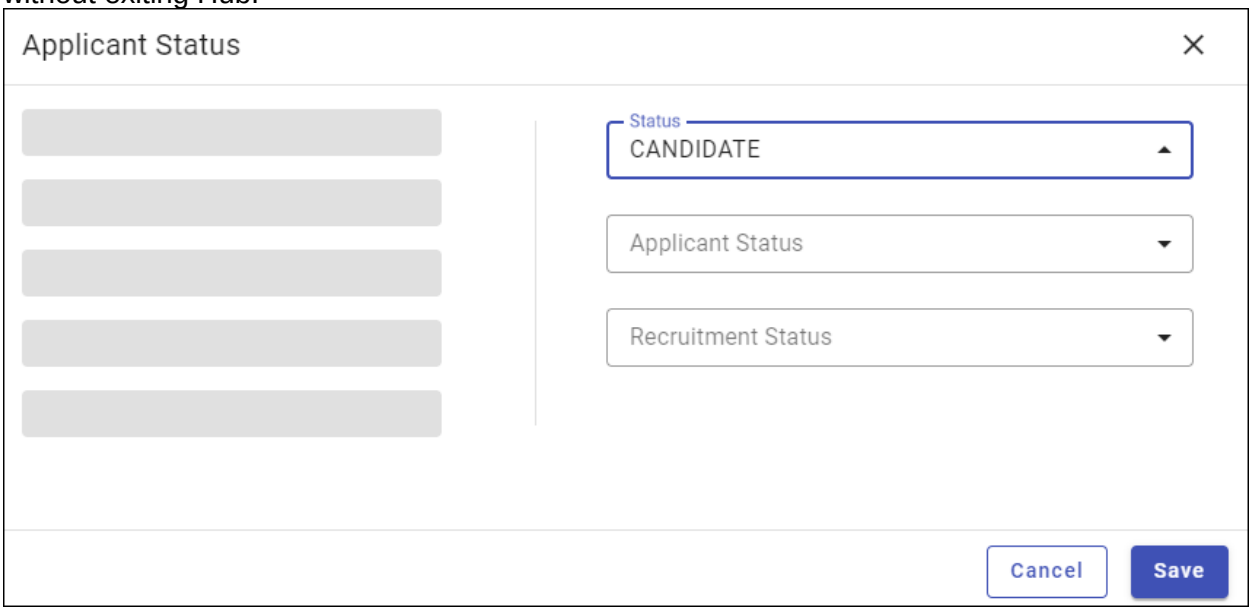
## Actions Menu

*This functionality is currently available for Munis cards only.*

For some cards, there is an action menu that allows you to update records in the source program without leaving Tyler Hub.



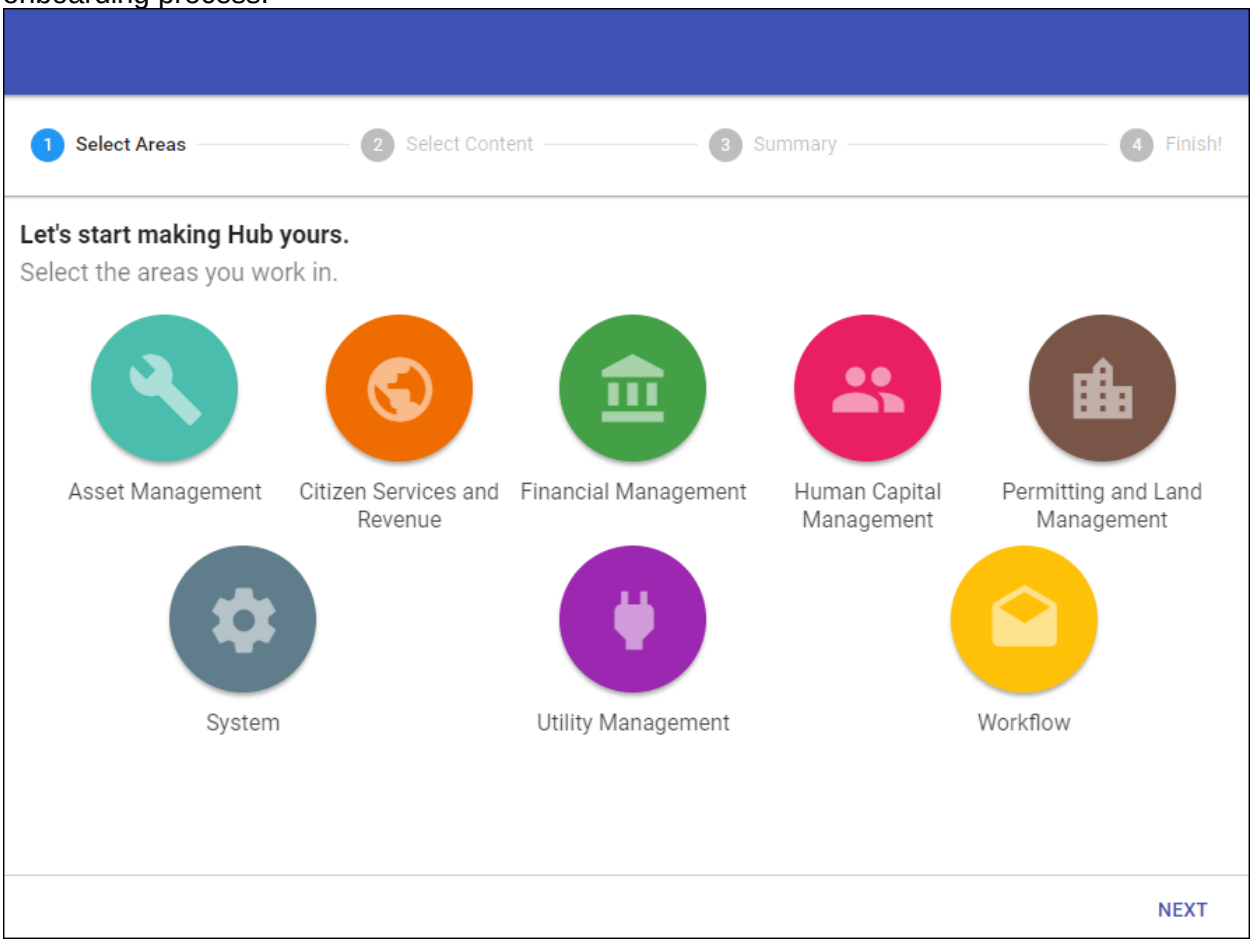

For example, if you select Update Pending Applicant Status from the Actions menu, the program provides the Applicant Status dialog box, allowing you to update the status in Munis without exiting Hub.




When you save the change, it is updated in the Munis source program.

# Onboarding

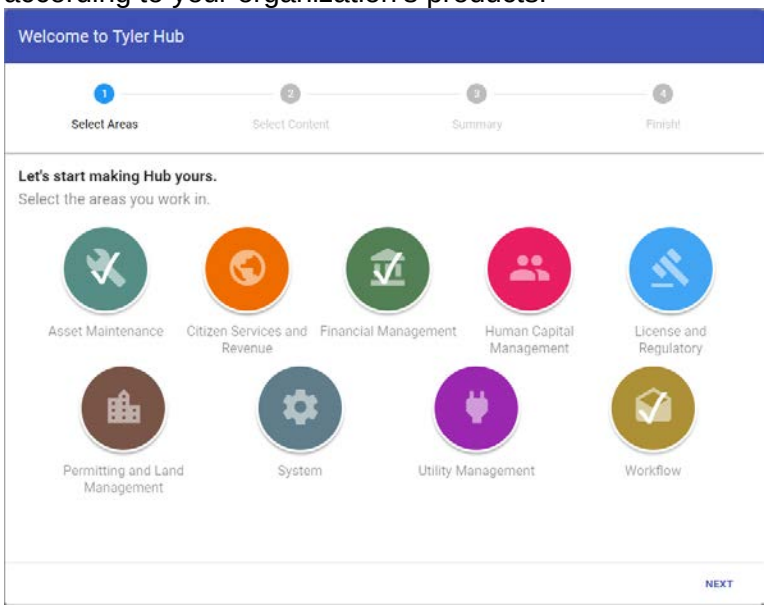
When you access Tyler Hub for the first time or after clicking the Restart Onboarding button in User Settings, the program provides step-by-step instructions for completing the Tyler Hub onboarding process.



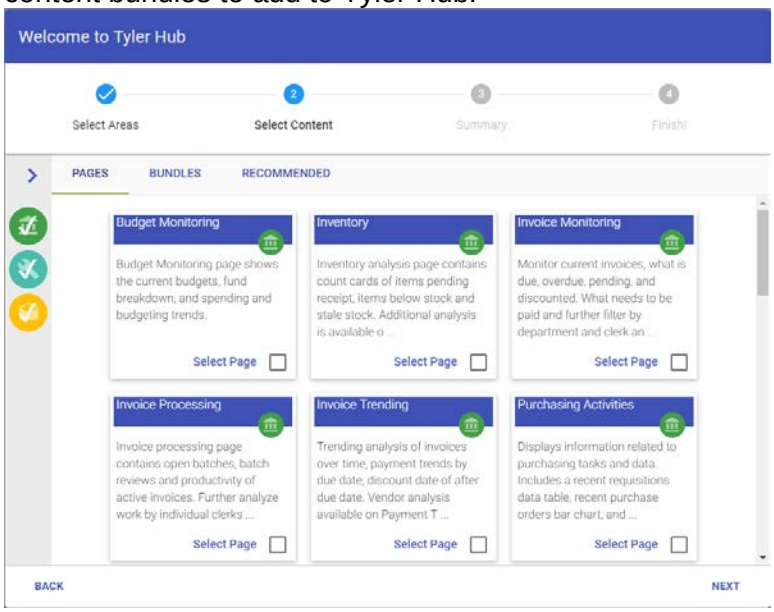

**Note:** Administrators can disable the onboarding process so depending on your organizational requirements, your environment may not include onboarding options.

To complete the onboarding process:

1. Click one or more icons to identify the areas in which you work. The available options vary according to your organization's products.



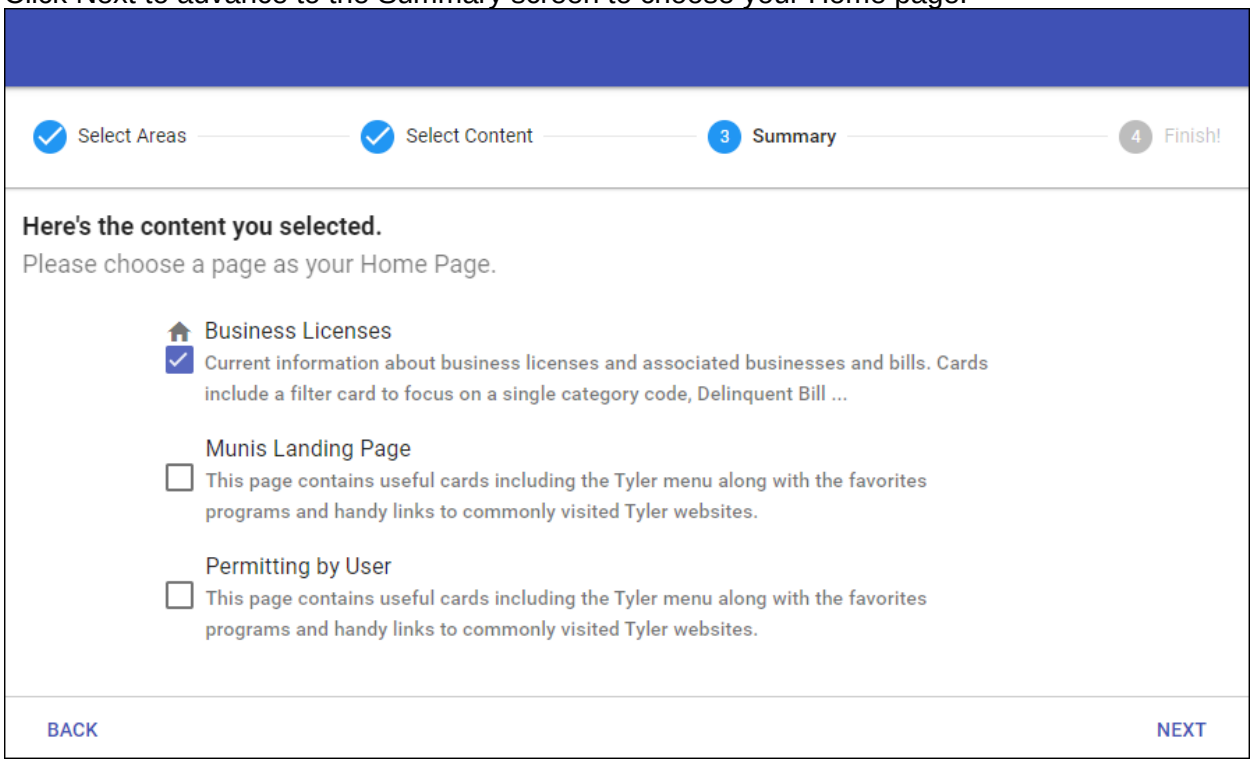

2. Click Next.
   The program advances to the Select Content screen where you can choose the pages or content bundles to add to Tyler Hub.



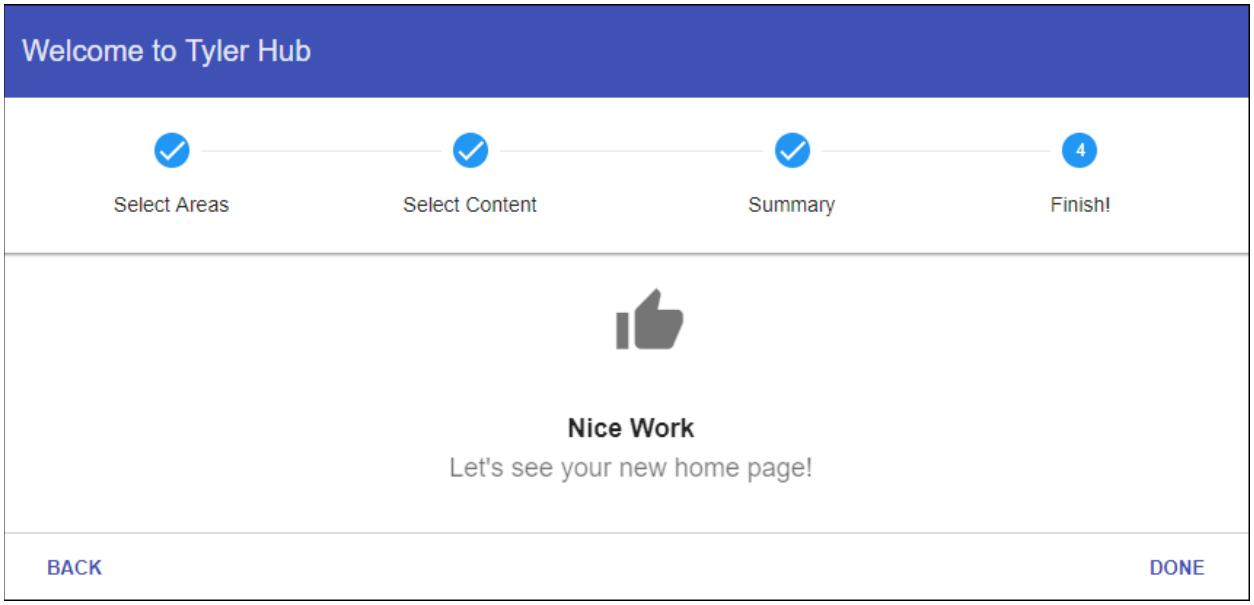

   **Note:** If you are migrating from the Tyler Dashboard, the system displays the **Recommended tab.** This tab suggests pages to add in Tyler Hub based on your existing web parts and favorite programs.

3. Select the check box for each page or content bundle to include.

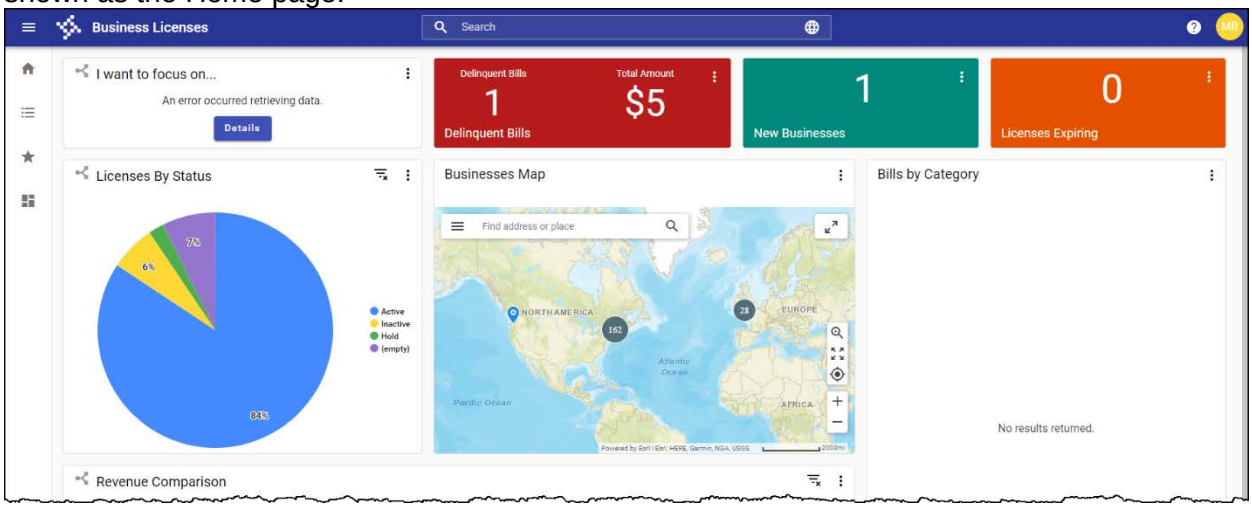
4. Click Next to advance to the Summary screen to choose your Home page.




5. Click Next to advance to the final screen.

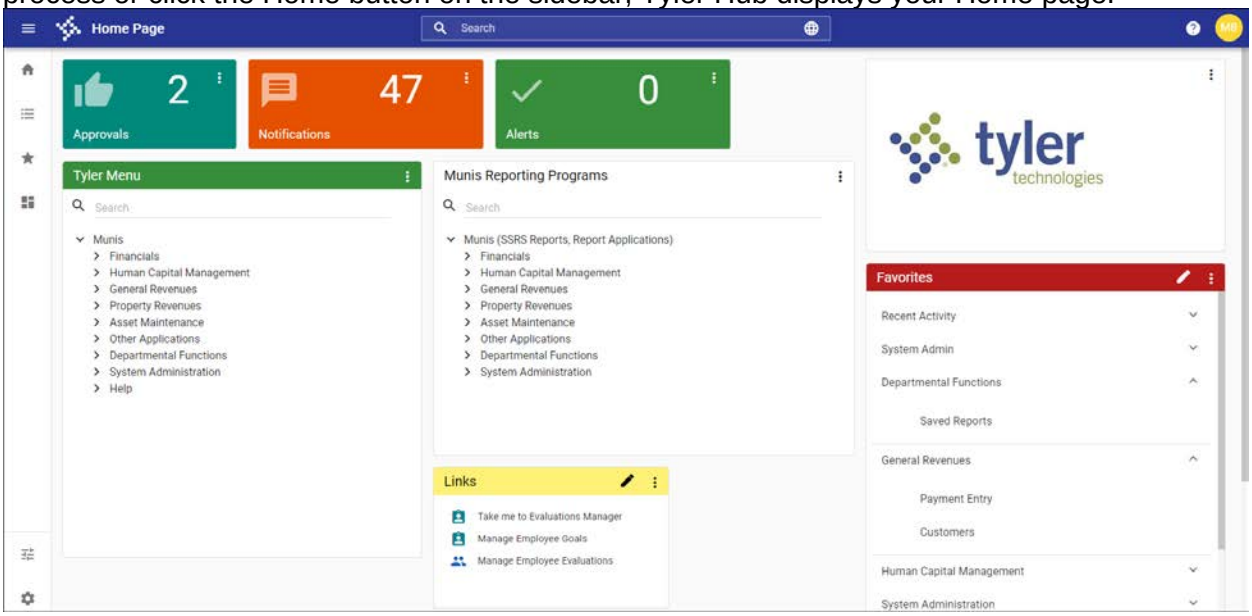


6. Click Done to complete the onboarding process.
   The program generates the Home page. In this example, the Business Licenses page is shown as the Home page.



# Home Page

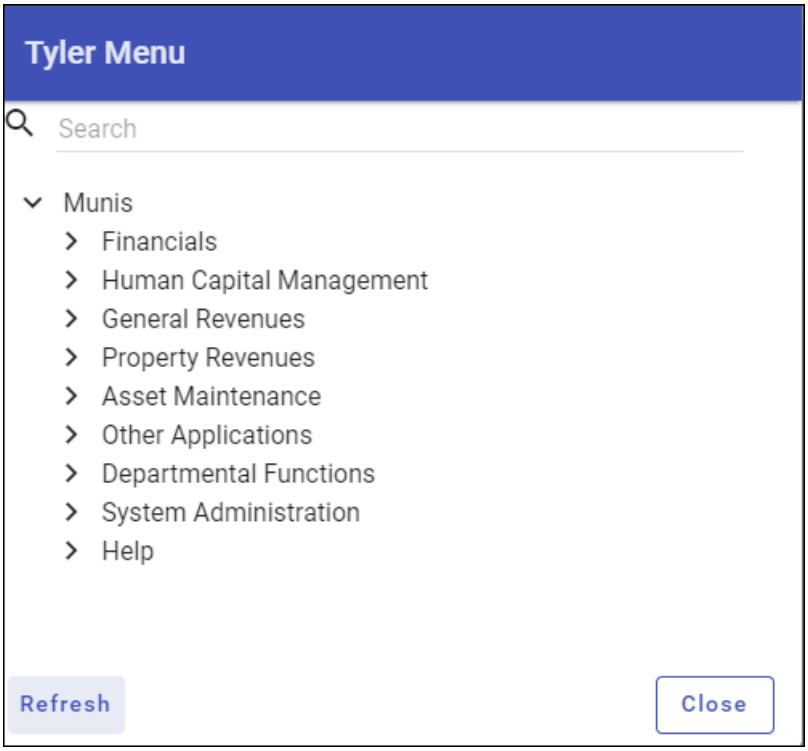
The Home page provides access to your Tyler menu and other cards that you or your administrator have applied to your Tyler Hub application. When you complete the onboarding process or click the Home button on the sidebar, Tyler Hub displays your Home page.




To set any installed page as the Home page, click the User Settings options in the Settings group of the sidebar and select a new Home page from the Home Page list.

# Tyler Menu

The Tyler Menu option displays the Tyler menu that is applicable to your organization. For example, if you are a Munis user, the Tyler Menu displays the Munis menu. Additionally, if your organization has integrated multiple Tyler products, those options are also included in the menu. The Tyler menu enforces all applicable menu- and role-based permissions based on your user ID.



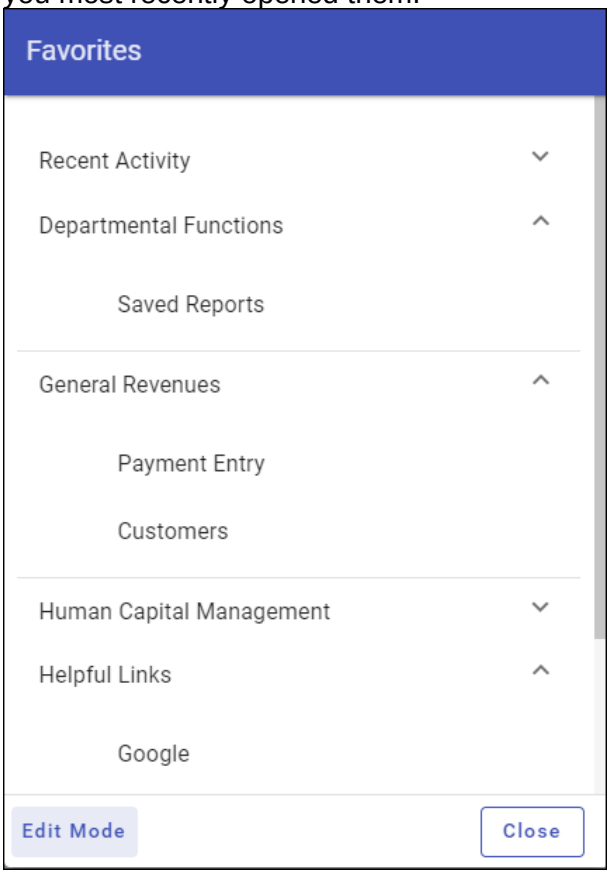

When you enter search criteria in the Search box, the system produces a list of programs that match the defined criteria. Select an option to open that program in your Tyler product.

After entering search criteria, the Search button refreshes to a Cancel button. Click Cancel to clear the entered search criteria.

Click Refresh to close any open menus and clear any currently displayed search results.

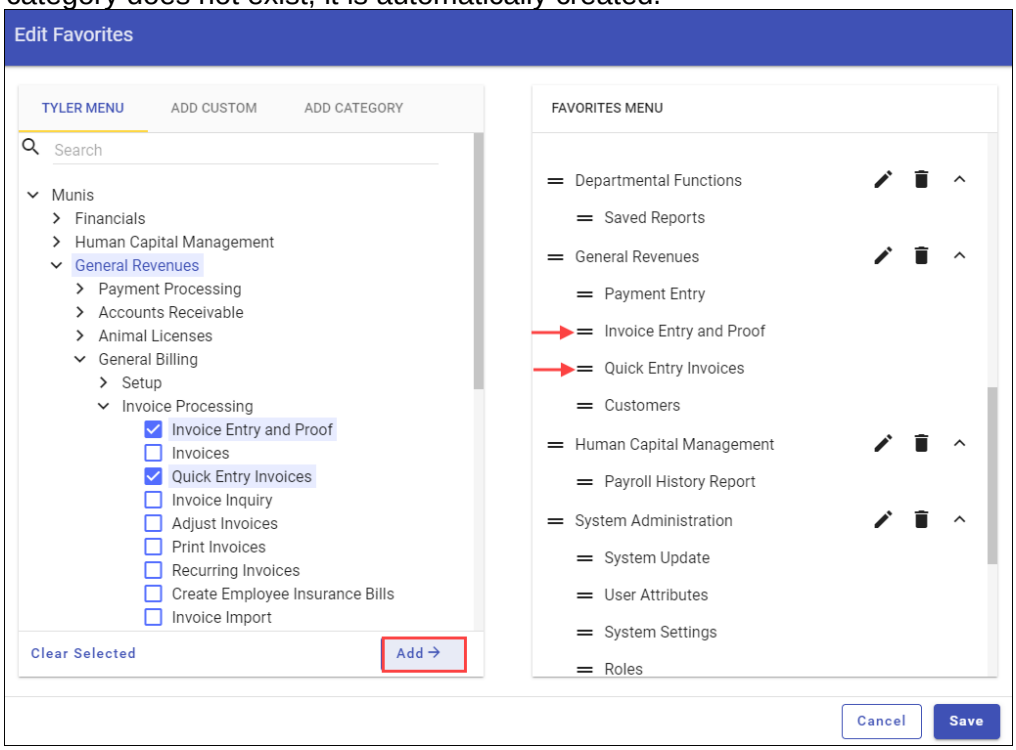
# Favorites

Favorites lists programs and categories you have added to your Favorites menu. The Recent Activity group within Favorites provides your recently accessed programs in the order in which you most recently opened them.

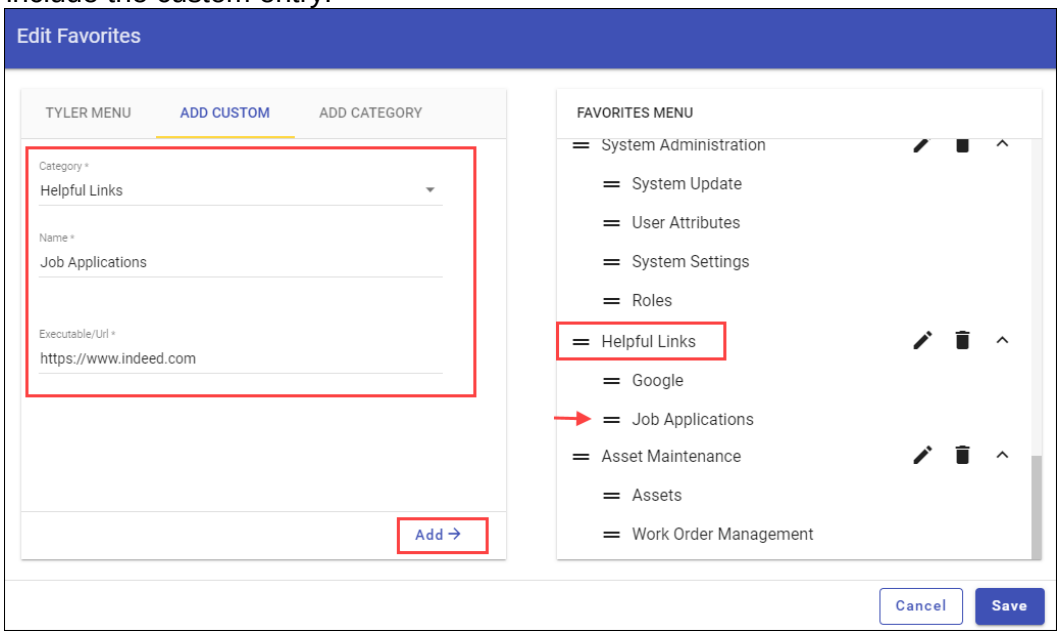



When you click Edit Mode on the Favorites display, you can add menu programs to your Favorites list, add custom links, and create custom categories that group similar programs or websites for easy access. For example, creating a Reports category allows you to group the reports you frequently use.

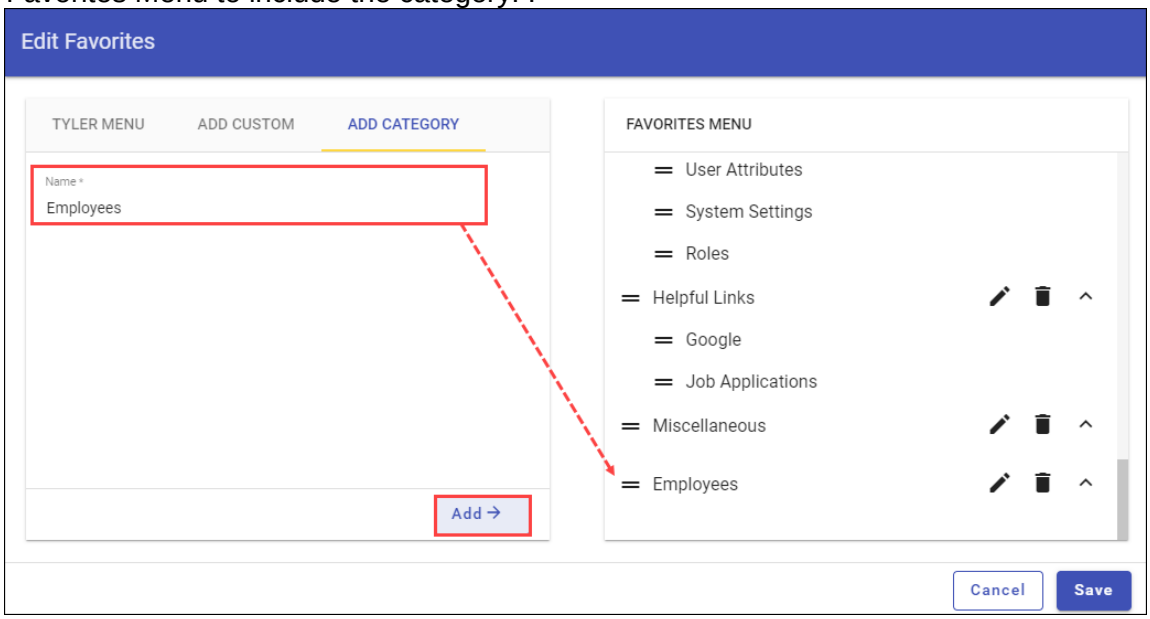
- To add a menu program, click the Tyler Menu tab, select the program or programs, and then click Add. Tyler Hub updates the Favorites Menu to include the selected programs. The favorite is automatically placed in a category that aligns with your menu. If the category does not exist, it is automatically created.



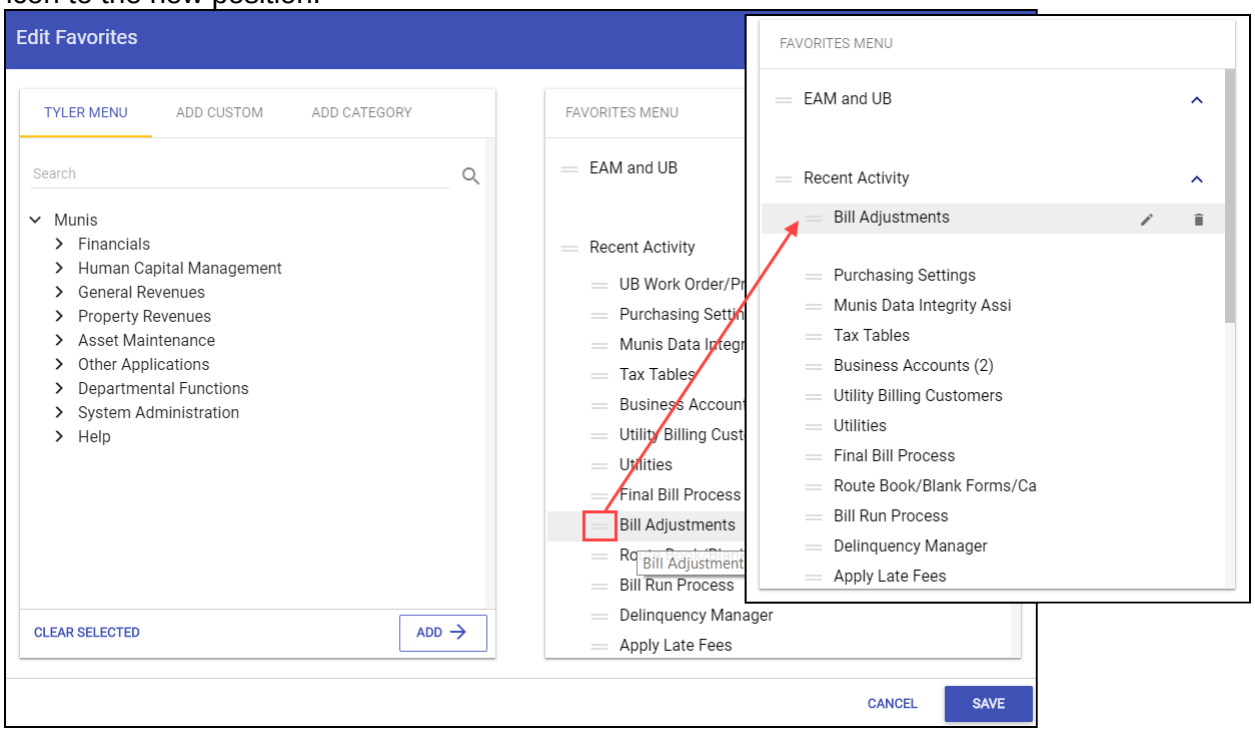

- To add a custom favorite, click the Add Custom tab, select a category, enter a name, and assign the program executable or URL. Tyler Hub updates the Favorites Menu to include the custom entry.



- To add a category, enter the category name and click Add. Tyler Hub updates the Favorites Menu to include the category. .




- To reorganize the Favorites Menu, highlight the item to move and then drag the Move icon to the new position.



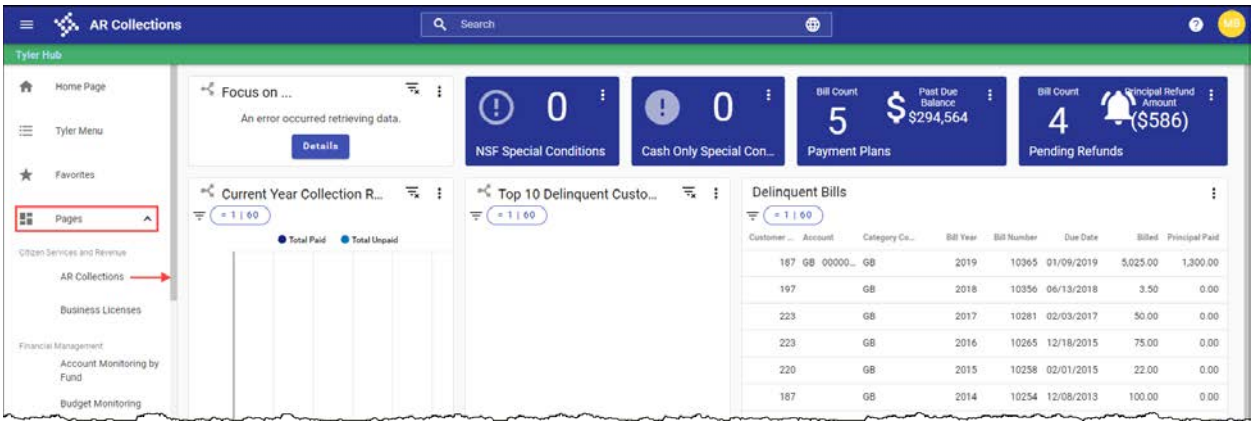

For each entry on the Favorites Menu, use the Edit and Delete buttons to maintain your selections. Clicking Edit allows you to update names and Delete removes the selection.

When you have completed the favorites activity, click Save to retain the changes.

# Pages

Pages are groups of cards that contain similar content or that provide a task-based theme. The Pages group of the sidebar features links to all the pages that have been added to your Tyler Hub.

Page groupings in the sidebar are controlled by the Group Pages By setting in the Edit Pages option in User Settings. To view a page, expand the Pages group in the sidebar and select the appropriate page.

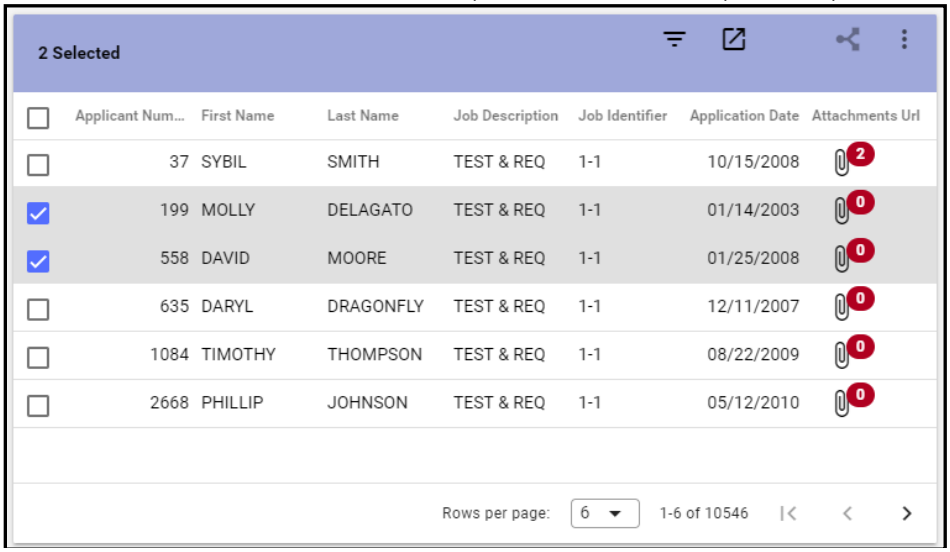



Page content varies, but all pages are made up of cards that summarize and display data. To remove a page from your Hub, use the Edit Pages option in User Settings.

See the Cards section for specific information on cards.

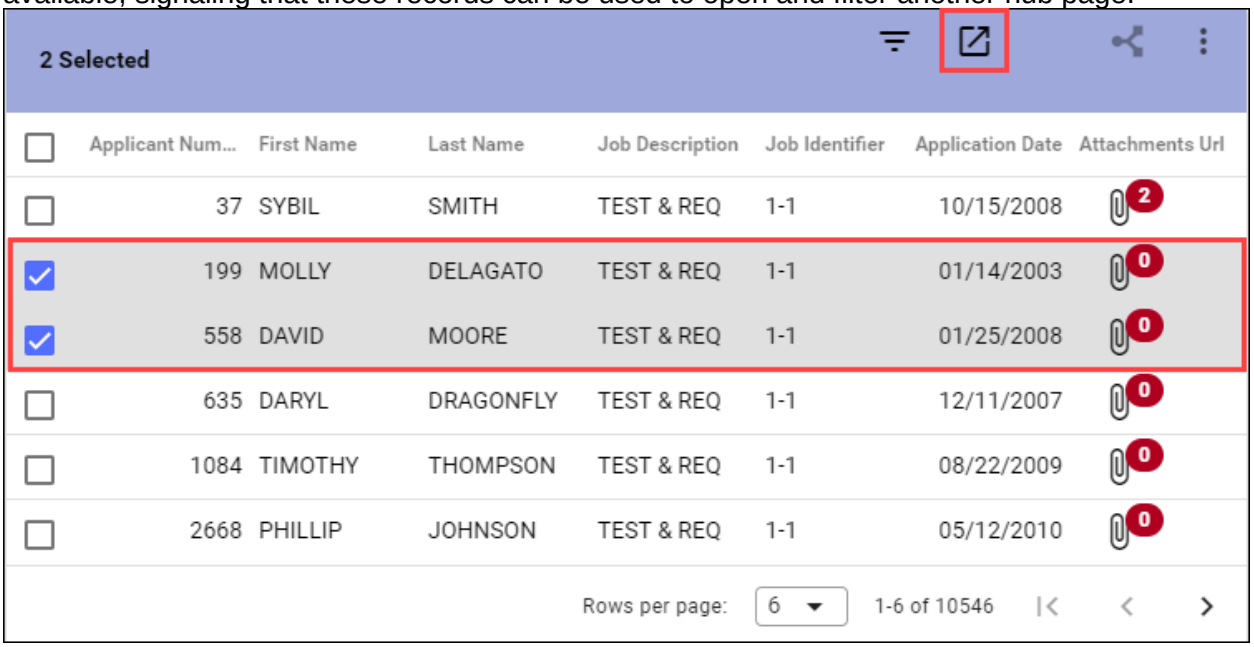
## Page-to-Page Filtering

Values from a data table on one page can be passed to a different page that contains a filter card and utilizes the same dataset. By passing values from a data table to a filter card on another page, you can view only the data that pertain to the records you selected. If record passing is available for a data table, when you select one or more records, the card header refreshes to include the Filter button, the Launch button, or both, according to the card setup.

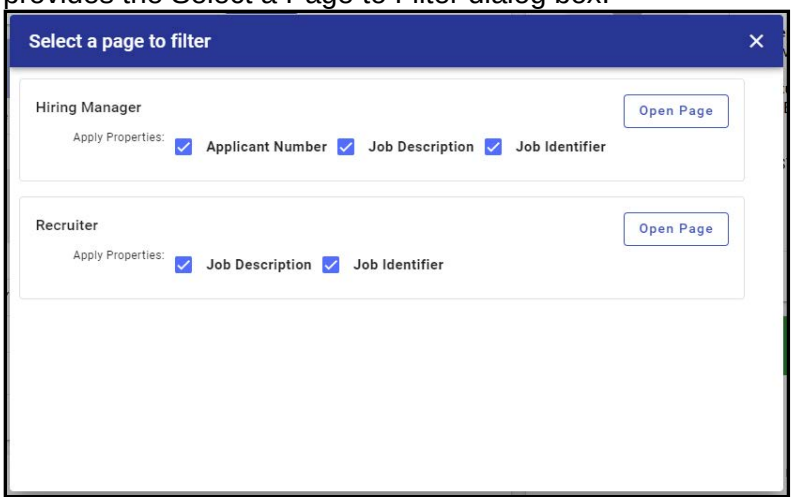


- The Filter ( ) button displays when the card connects (as an origin card) to other cards on this page. The Filter button filters the other cards on this page that are connected to this card as receiving cards, using the fields set up in the connection.
- The Launch ( ) button displays when there are filterable pages associated with the card and defined dataset. When you click the Launch button, Hub provides a menu of filterable pages associated with this card (that is, pages that have a filter card that use the same dataset and fields as this card.

For example, when you select one or more records on a data table, the Launch button is available, signaling that these records can be used to open and filter another hub page.

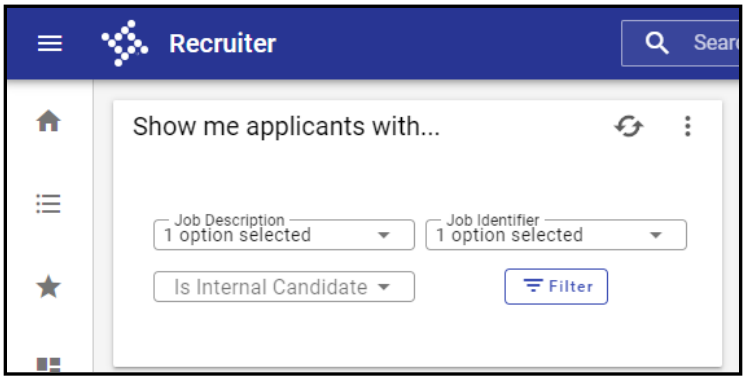



When you select Advanced Page Filtering from the menu (after clicking the Launch button), Hub provides the Select a Page to Filter dialog box.



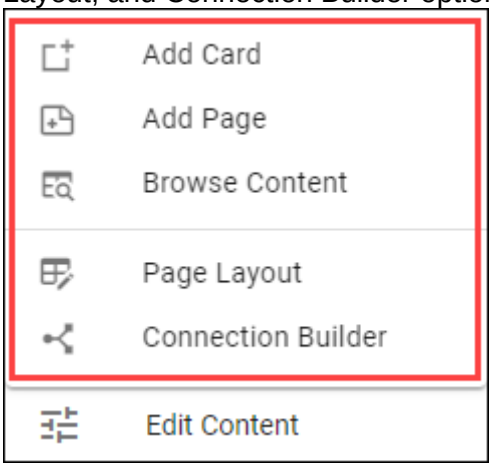

This dialog box presents all the pages that are available to use with the Advance Page Filtering option, not just those you have incorporated into your Hub. Select or clear the check boxes as

applicable and then click Open Page. Hub opens the page in a new browser tab with the page filtered by the values from the selected rows in the data table. For example, if you click Recruiter from the page selection dialog, the Recruiter page opens with the selected values prepopulated in the filter card.




# Edit Content

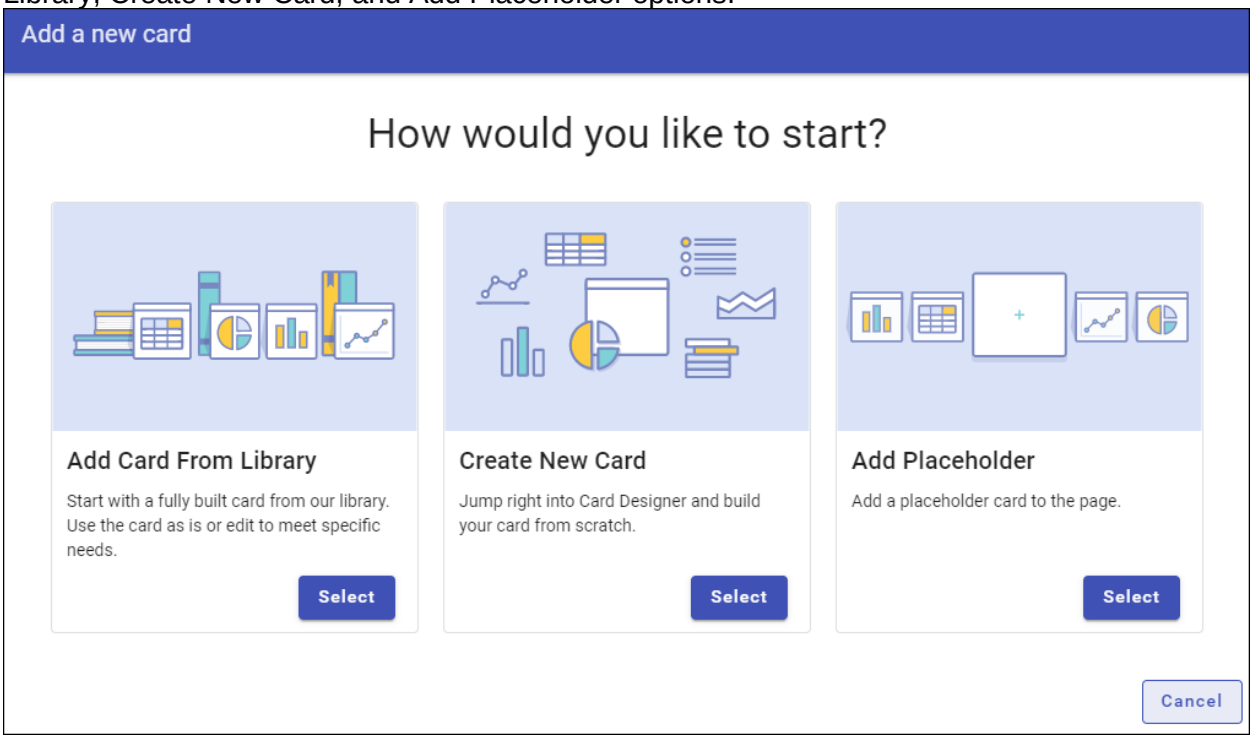
The Edit Content group in the sidebar features the Add Card, Add Page, Browse Content, Page Layout, and Connection Builder options.




Edit Content options vary according to your assigned permissions.

# Add Card

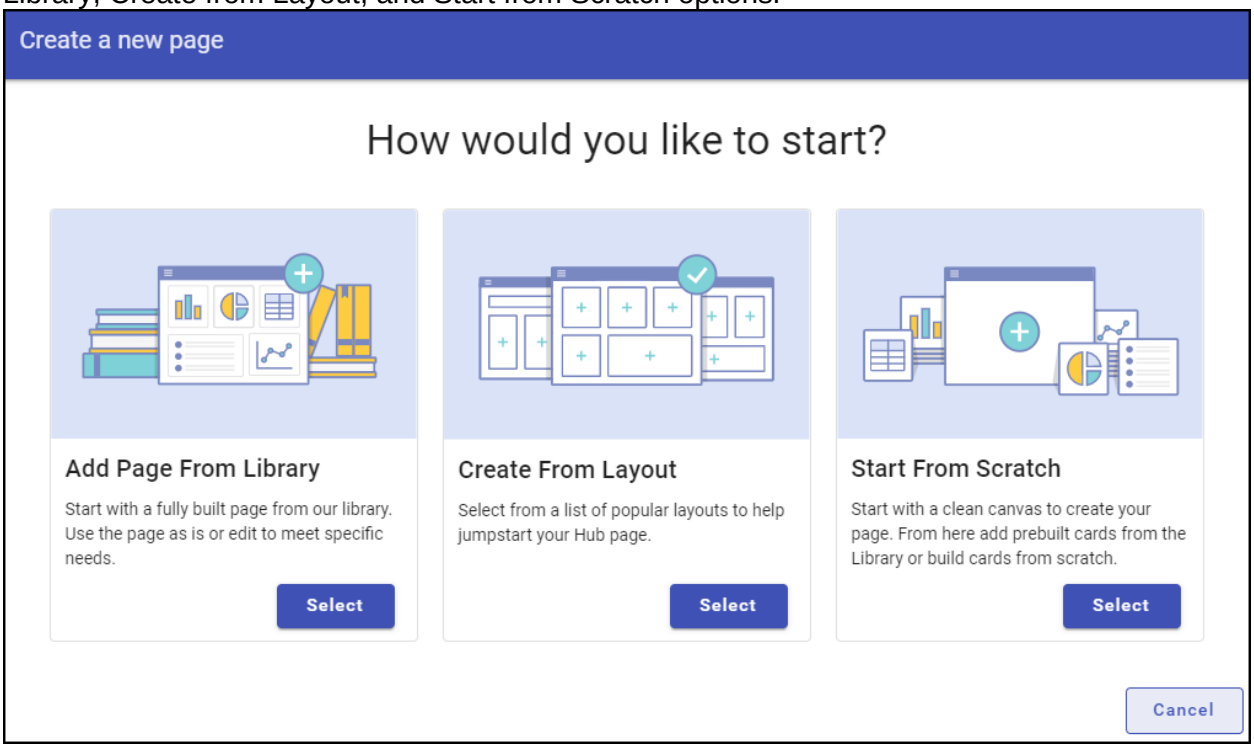
Add Card provides a guided process for adding a card to your Tyler Hub. When you click Add Card from the Edit Content menu, the Add a New Card dialog box provides the Add Card from Library, Create New Card, and Add Placeholder options.




- Add Card from Library—Opens the Content Library with a list of cards from which you can select to use as-is or customize to meet your needs.
- Create New Card—Opens the Card Designer to a selection of predefined layouts from which you can select to get started. See Appendix A for more information on the Card Designer.
- Add Placeholder—Opens the Card Designer to a blank page to which you can add cards from the Content Library or you can create customized cards to include.

## Add Page

Add Page provides a guided process for adding a page to your Tyler Hub. When you click Add Page on the Edit Content menu, the Create a New Page screen provides the Add Page from Library, Create from Layout, and Start from Scratch options.

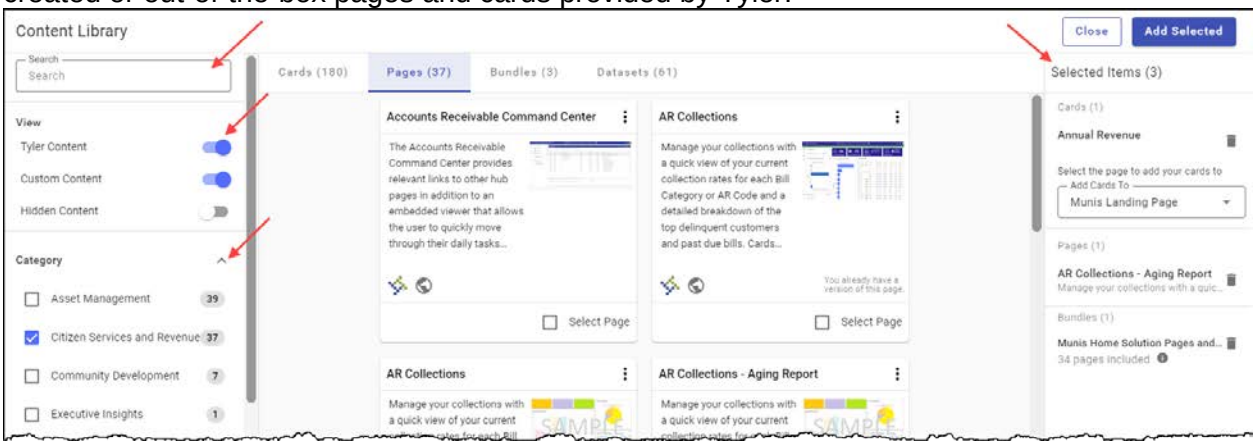



- Add Page from Library—Opens the Content Library with a list of pages from which you can select to use as-is or customize to meet your needs.
- Create from Layout—Opens the Page Designer to a selection of predefined layouts from which you can select to get started.
- Start from Scratch—Opens the Page Designer to a blank page to which you can add cards from the Content Library or you can create customized cards to include.

## Browse Content

Browse Content provides the Content Library, which stores pages, cards, and content bundles that are available for adding to your Tyler Hub. The Datasets tab shows available datasets and allows you to preview the details.

Within the Content Library, you can add custom content that users at your organization have created or out-of-the-box pages and cards provided by Tyler.



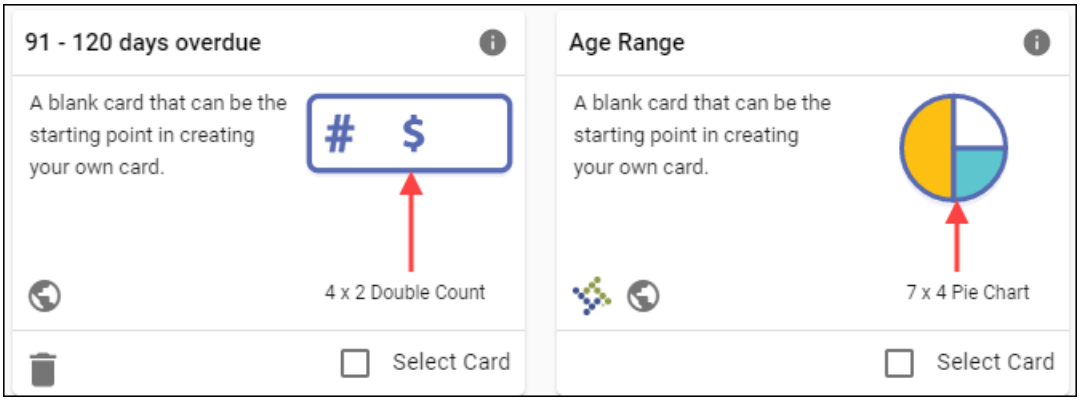

The sidebar provides the Search, View, and Category groups:

- Entering a keyword in the Search box causes Hub to display items containing that keyword in either the title or the description.
- Selecting the Tyler Content, Custom Content, or Hidden Content options determine the items that display on the Cards, Pages, Content Bundles, and Datasets tabs. For example, if you disable the Custom Content option, any cards, pages, content bundles, or datasets that have been published by other users are not available for review or selection. (Hidden content and the Hidden Content option are only available to users with administrator permissions.)
- Specifying a category or categories causes Hub to display only items contained in those categories. When your Tyler Hub contains a large number of cards, pages, content bundles, or datasets, this can significantly reduce the number of items that are available for review and selection.

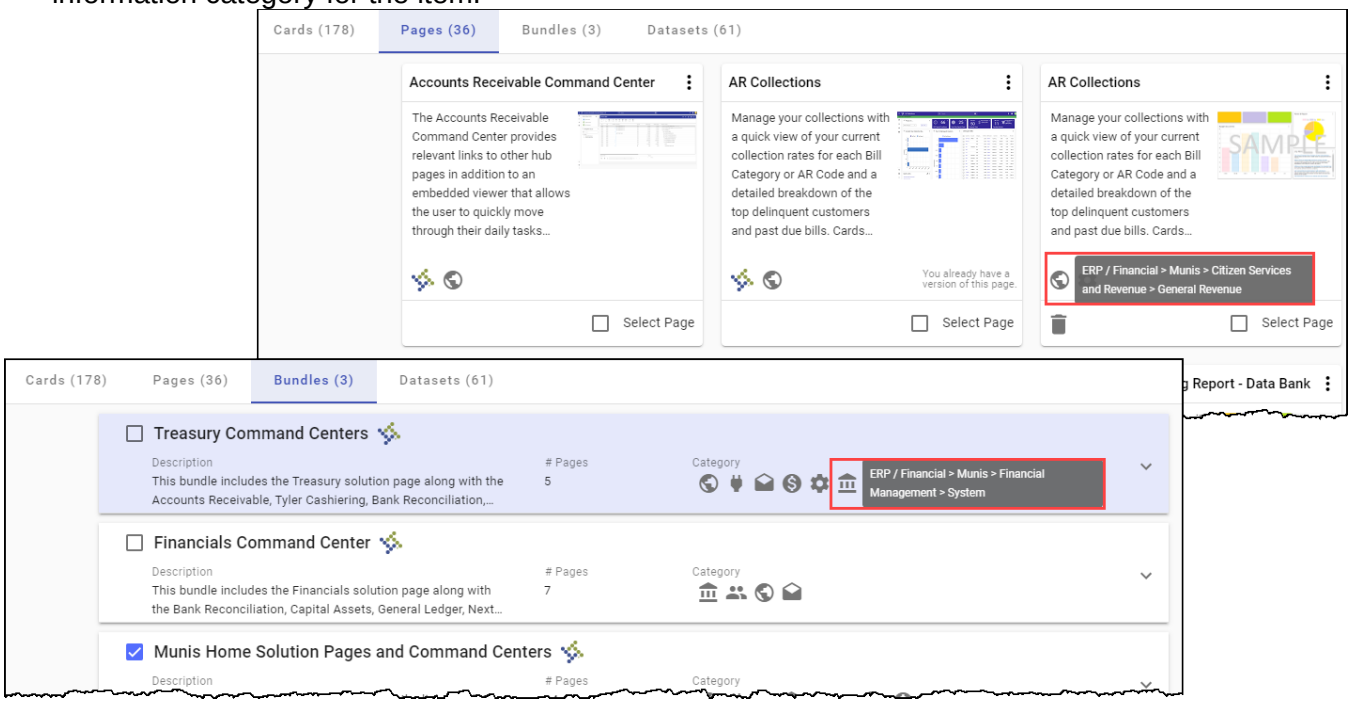
The Selected Items pane provides a list of all items selected for addition to your Tyler Hub. Once you have chosen the cards, pages, or content bundles to add, clicking Add Selected assigns these items to your Tyler Hub. If you select multiple pages, the page most recently selected is the active page when you return to the main Tyler Hub page.

On the cards, pages, and content bundles tiles and lists, icons provide visual assistance for determining the card content:

- For cards, the icon represents the card type, for example, a double-count or pie chart card.



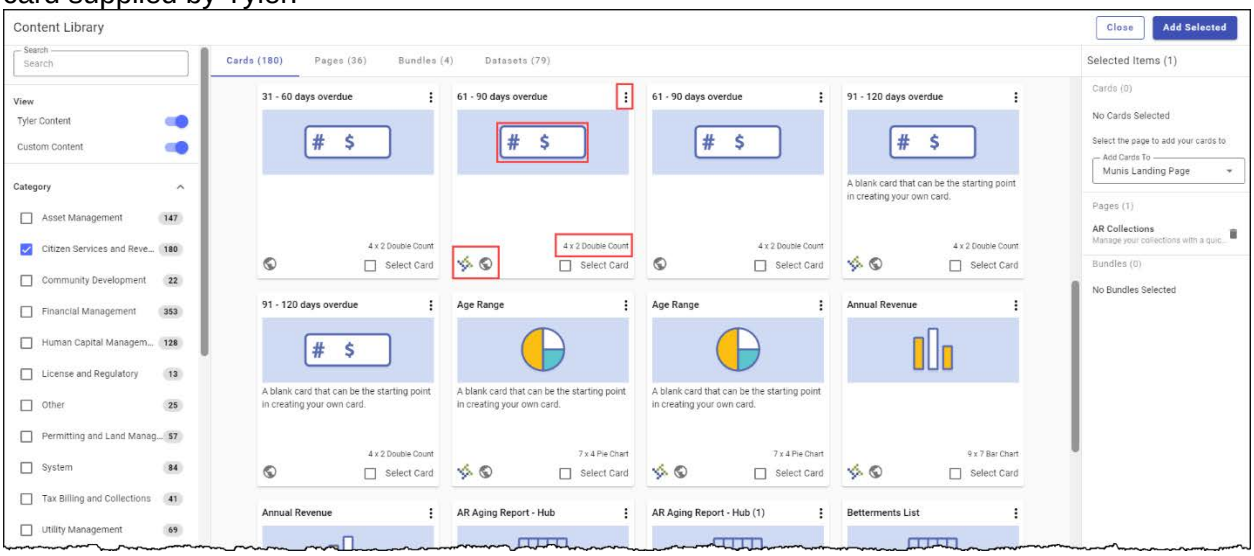

- For pages and content bundles, hovering your pointer over an icon displays the information category for the item.



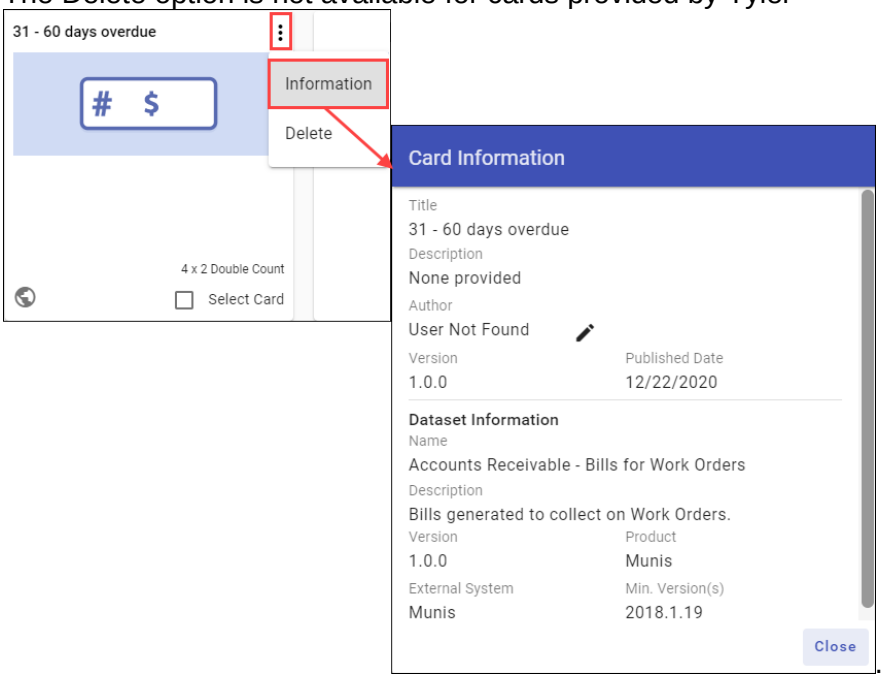
## Cards

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

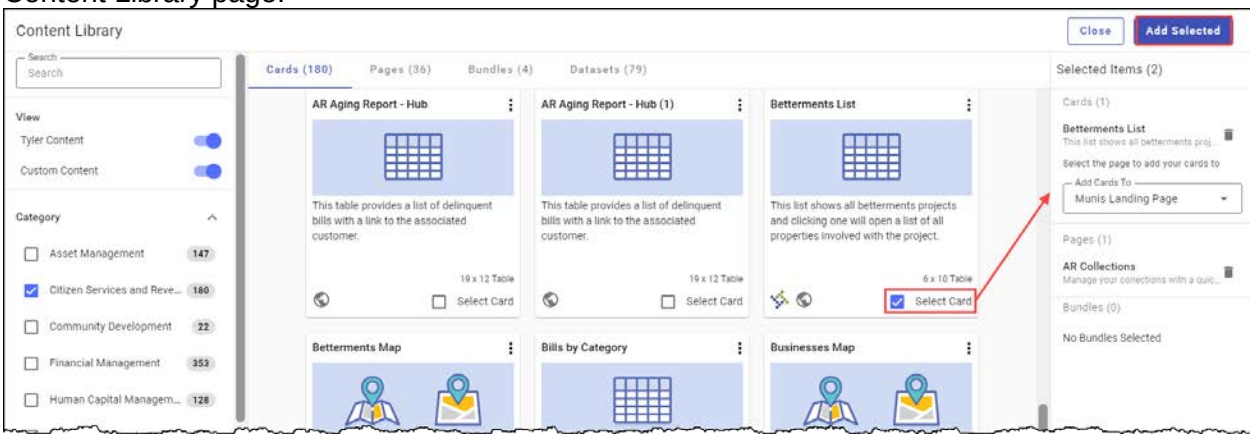
The Content Library presents cards in a tile format. Each tile typically includes the card title, a large icon indicating the card type, the card size, a small icon (or icons) indicating the area or areas to which the card applies, and if applicable, the Tyler logo indicating the card is a default card supplied by Tyler.




Clicking the More ( ⋮ ) button provides the context menu, which includes the Information and Delete options. The Information option presents the card details. The Delete option, which is available to users with administrator permissions, removes the card from the Content Library. The Delete option is not available for cards provided by Tyler



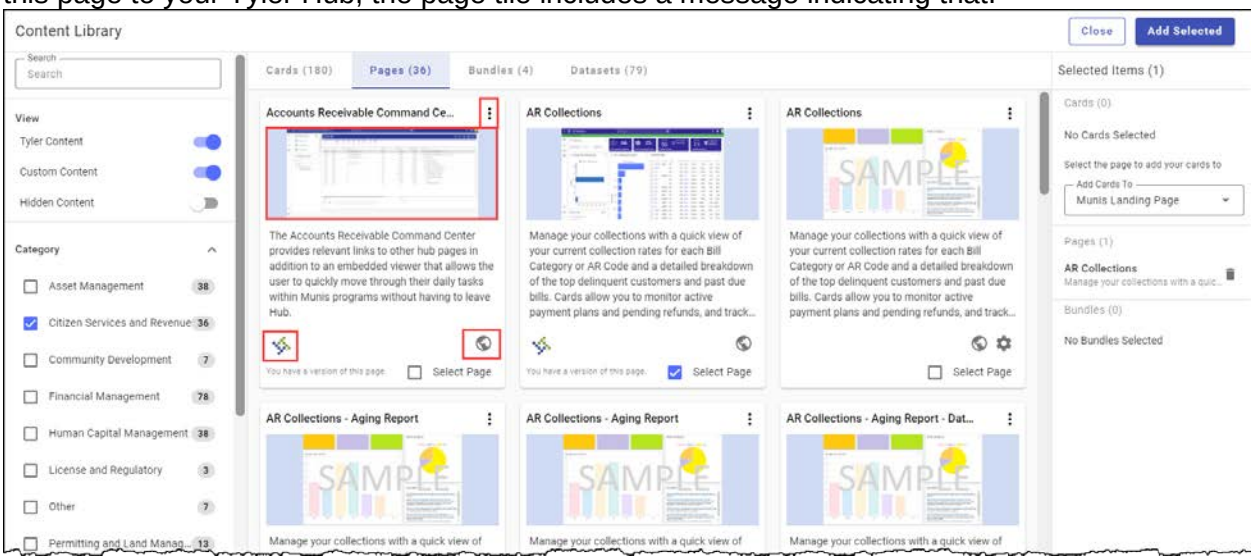
To add cards to a page, select the Select Card check box, use the Add Cards To list to specify the page to add the cards to, and then click Add Selected in the upper-right corner of the Content Library page.



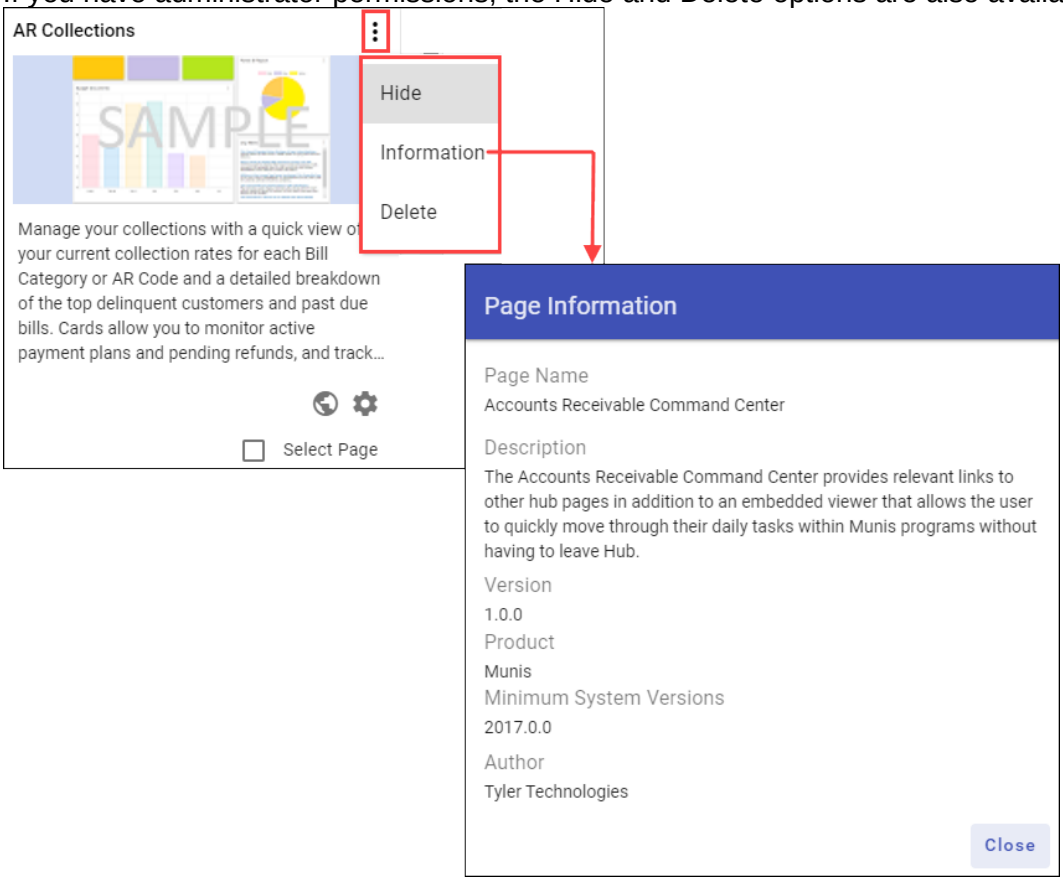

## Pages

Pages displays groups of associated cards. For published pages, cards have already been selected and defined, but you can customize these pages after adding them to your Tyler Hub.

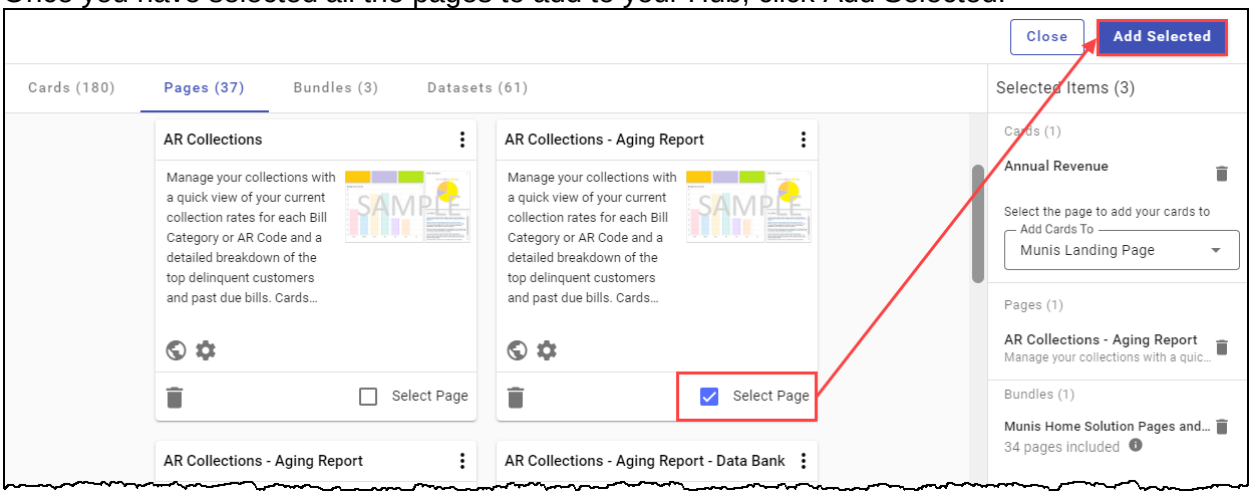
The Content Library presents pages in a tile format. Each tile typically includes the page name, a sample thumbnail of the page, a brief description of the page, an icon or icons representing the functional area or areas to which the page applies, and if applicable, the Tyler logo indicating the page is a default page supplied by Tyler. If you have already applied a version of this page to your Tyler Hub, the page tile includes a message indicating that.



Clicking the More ( ⋮ ) button provides the context menu, which includes the Information option. If you have administrator permissions, the Hide and Delete options are also available.




To add pages to your Tyler Hub, navigate to the tile for the page to add and click Select Page. Once you have selected all the pages to add to your Hub, click Add Selected.

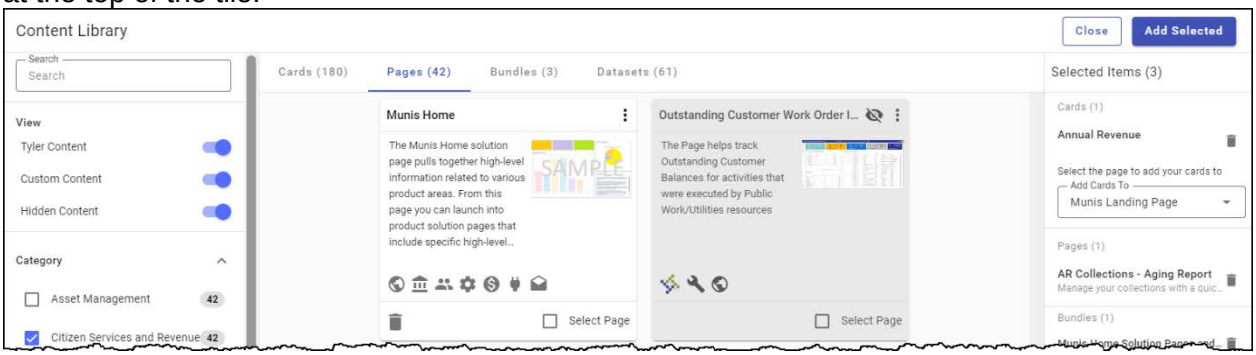



When you have selected all the applicable pages, click Close to exit the Content Library. If you selected multiple pages, Tyler Hub displays the last page selected.

### *Hiding Pages in the Content Library*

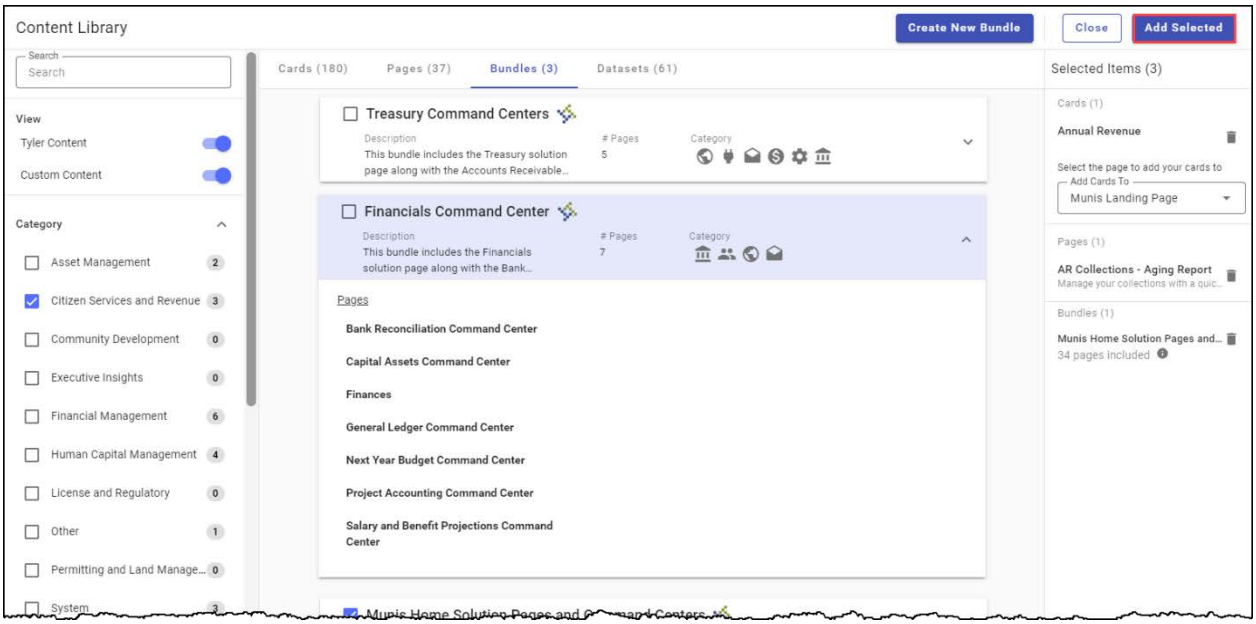
If you have content administrator permissions, you are able to identify published pages as hidden. In this case, when you click the More button for a page in the Content Library, the Hide option allows you to set that page as hidden.

When content is hidden, it is not available in the Content Library to users who do not have administrator permissions. Hidden content contains a gray background and the hidden icon ( ) at the top of the tile.

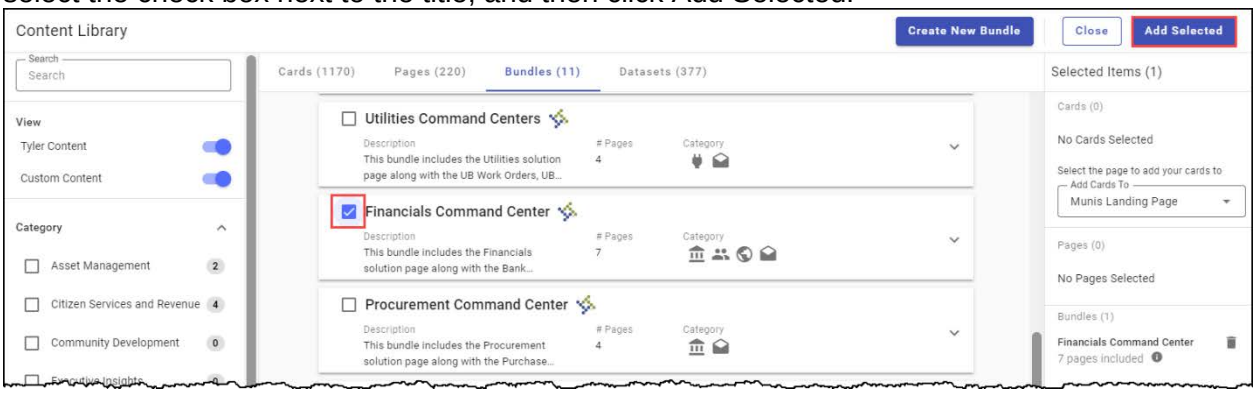


## Content Bundles

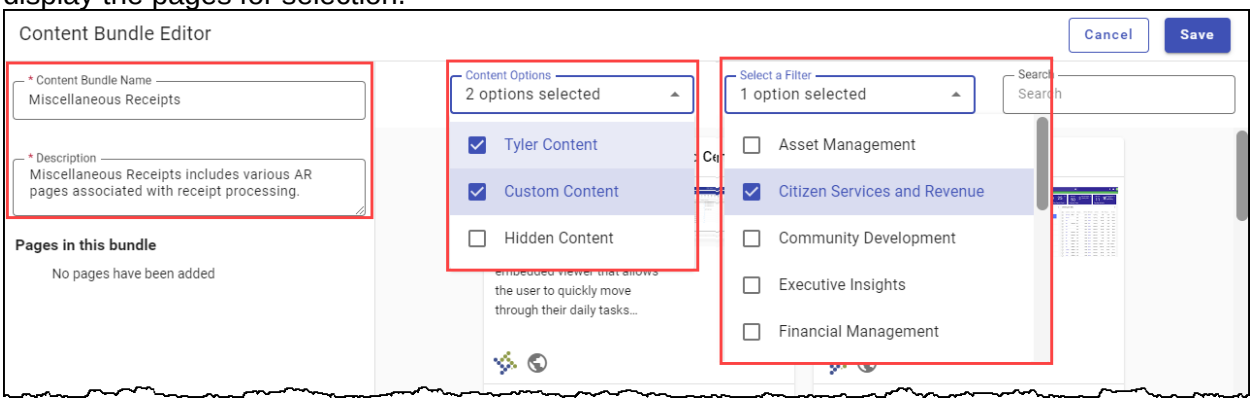
Content bundles are user-defined collections of pages and their associated cards. Click the Bundles tab to view the available bundles. Use the down arrow to expand the contents of a bundle.



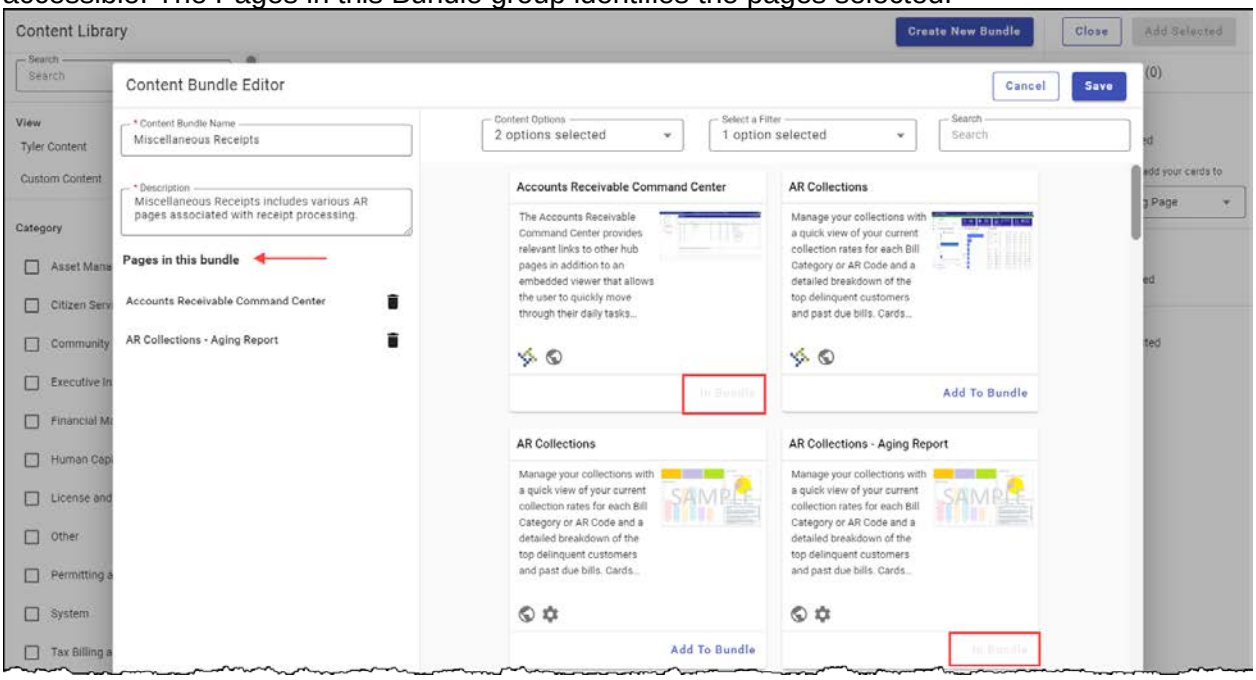

- To apply an existing bundle to your page, expand the bundle to reivew the contents, select the check box next to the title, and then click Add Selected.



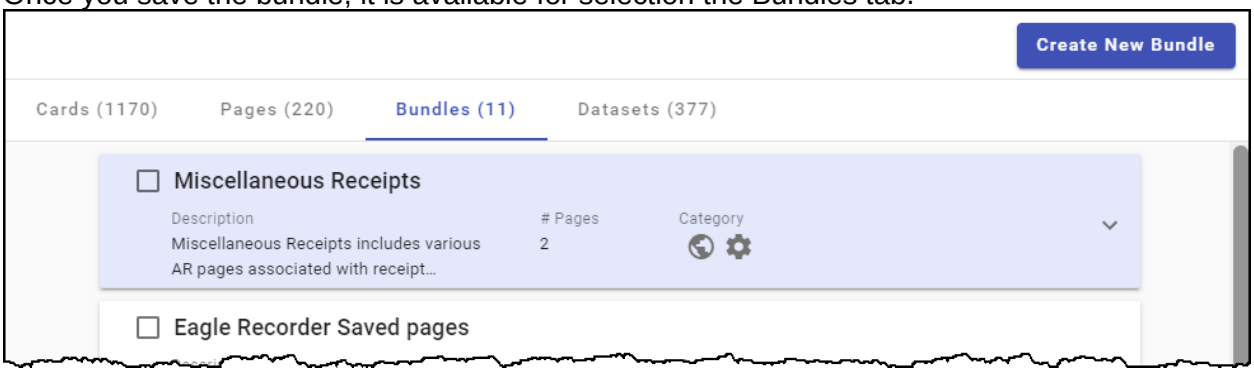
- To create a new bundle, click Add New Bundle to display the Content Bundle Editor. Assign a name, enter a brief description, and then select the pages by clicking Add to Bundle on a page tile. Define the Content Options and assign the applicable filters to display the pages for selection.




From the applicable pages, select those to include in the bundle and then click Save. As you select pages, the Add to Bundle option refreshes to In Bundle and is no longer accessible. The Pages in this Bundle group identifies the pages selected.

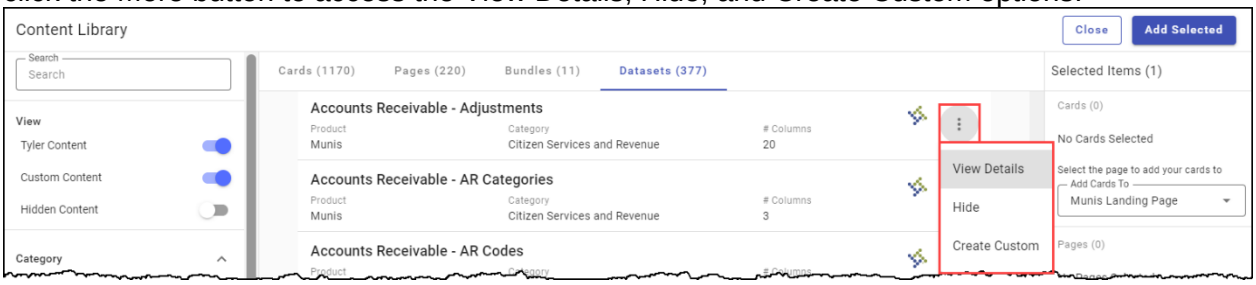



Once you save the bundle, it is available for selection the Bundles tab.



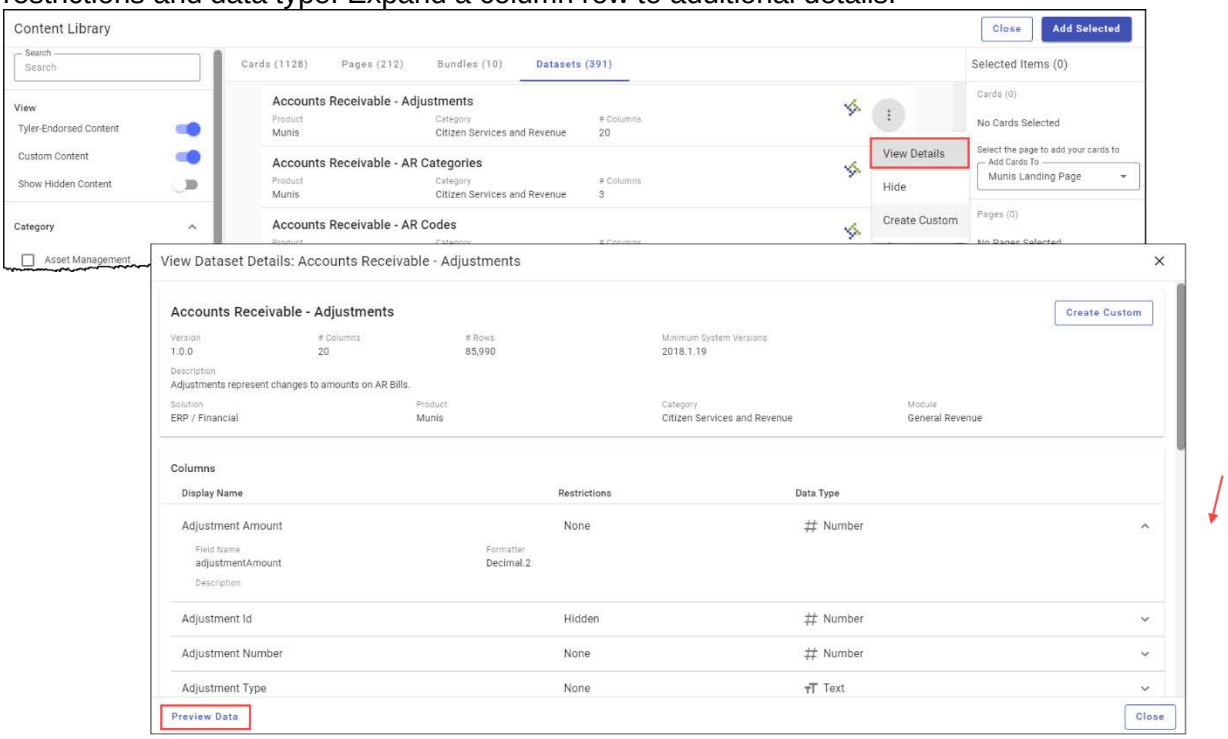
## Datasets

The Datasets tab shows available datasets and allows you to preview the details. For a dataset, click the More button to access the View Details, Hide, and Create Custom options.

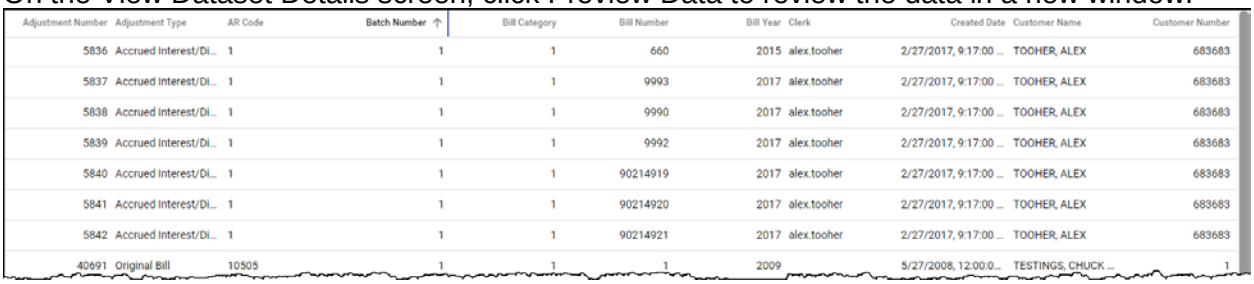


## *View Details*

Click View Details to see the version; number of columns and rows; minimum system version; description; solution, product, category, and module, along with the column details including restrictions and data type. Expand a column row to additional details.




On the View Dataset Details screen, click Preview Data to review the data in a new window.



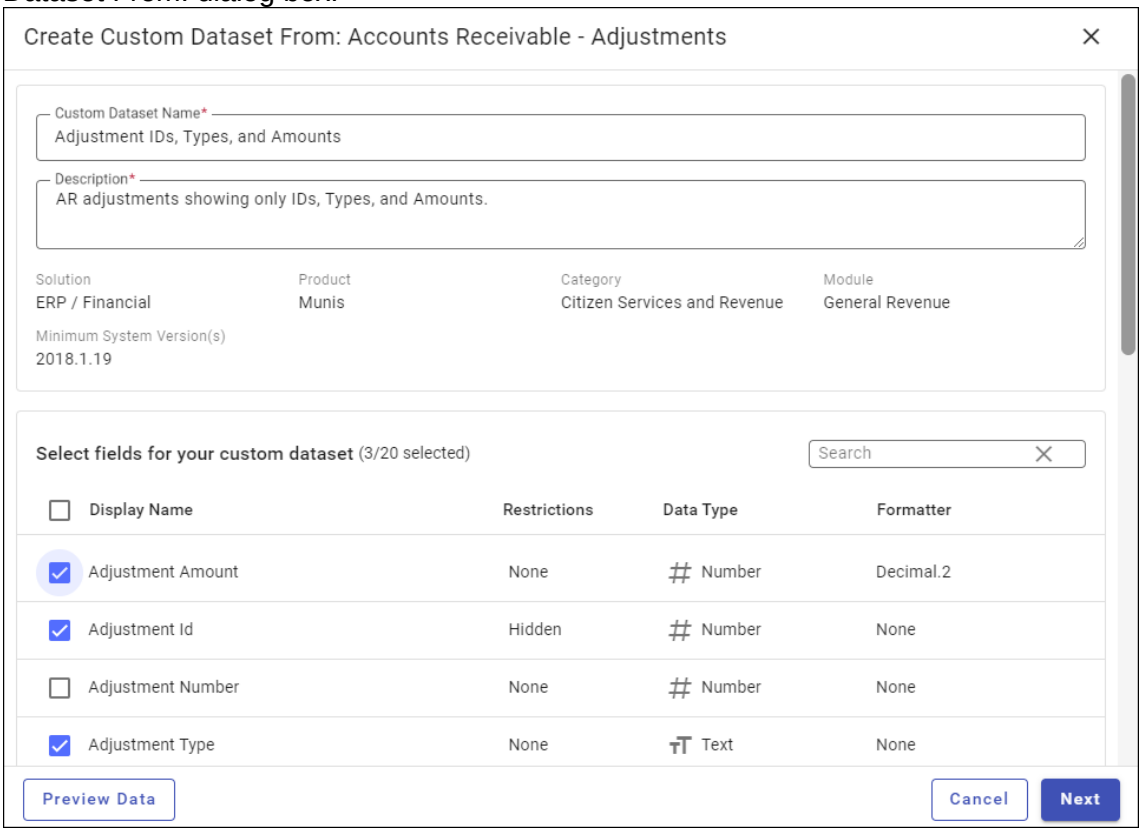
| Adjustment Number | Adjustment Type | AR Code | Batch Number | Bill Category | Bill Number | Bill Year | Clerk | Created Date | Customer Name | Customer Number |
|---|---|---|---|---|---|---|---|---|---|---|
| 5836 | Accrued Interest/Di... | 1 | 1 | 1 | 660 | 2015 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5837 | Accrued Interest/Di... | 1 | 1 | 1 | 9993 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5838 | Accrued Interest/Di... | 1 | 1 | 1 | 9990 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5839 | Accrued Interest/Di... | 1 | 1 | 1 | 9992 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5840 | Accrued Interest/Di... | 1 | 1 | 1 | 90214919 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5841 | Accrued Interest/Di... | 1 | 1 | 1 | 90214920 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 5842 | Accrued Interest/Di... | 1 | 1 | 1 | 90214921 | 2017 | alex.tooher | 2/27/2017, 9:17:00 ... | TOOHER, ALEX | 683683 |
| 40691 | Original Bill | 10505 | 1 | 1 | 1 | 2009 | | 5/27/2008, 12:00:0... | TESTINGS, CHUCK ... | 1 |

## *Hide*

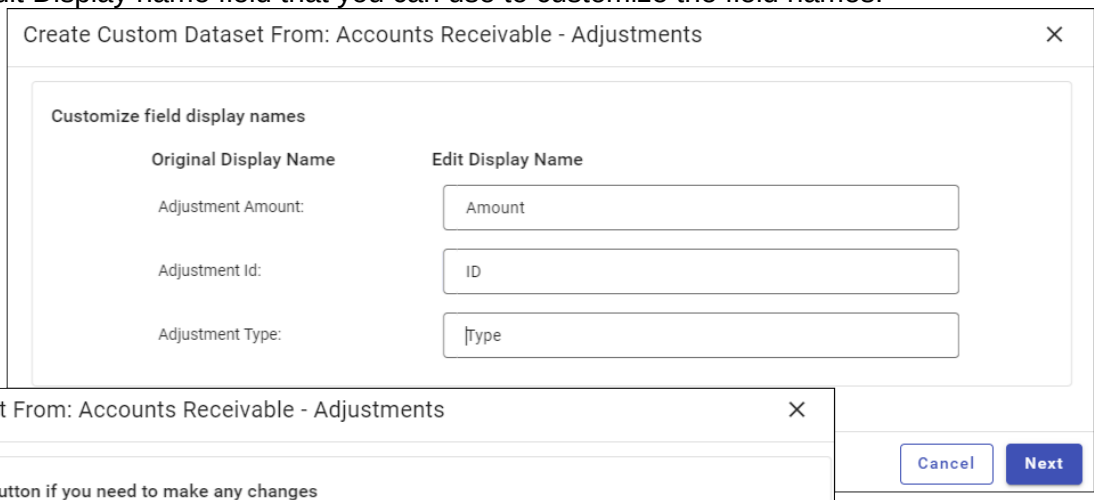
Click Hide to remove the dataset from view. In this case, the dataset is not available for selection in the Card Designer. Hidden content is available to users with administrative permissions.

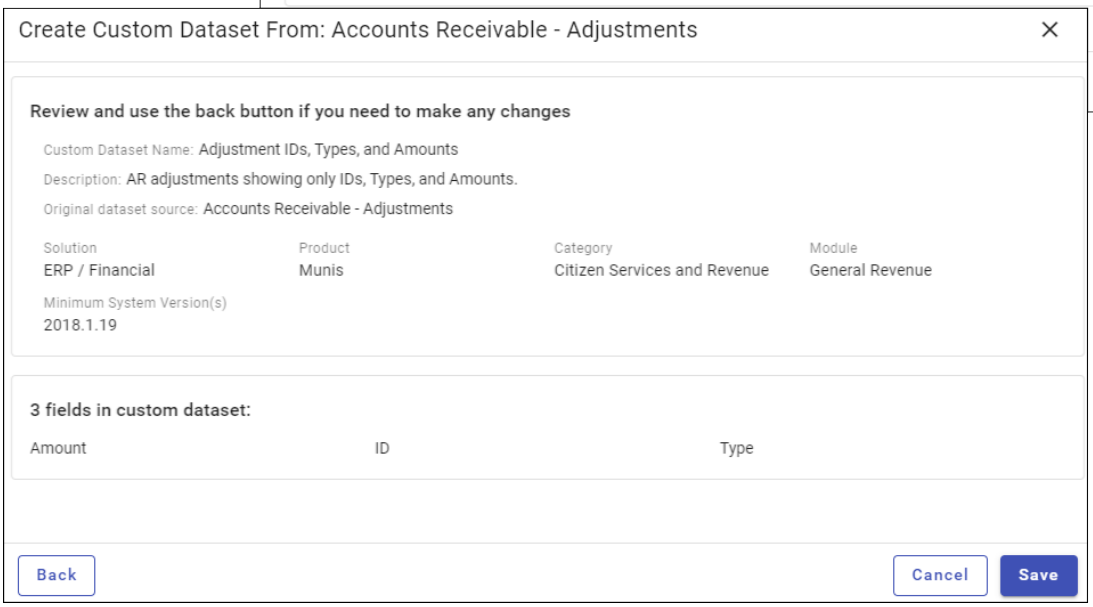
## *Create Custom*

Select Create Custom on the View Details page and on the More menu to create a new content bundle based on the features of the selected bundle. For example, for the Accounts Receivable–Adjustments bundle, selecting the Create Custom presents the Create Custom Dataset From: dialog box.

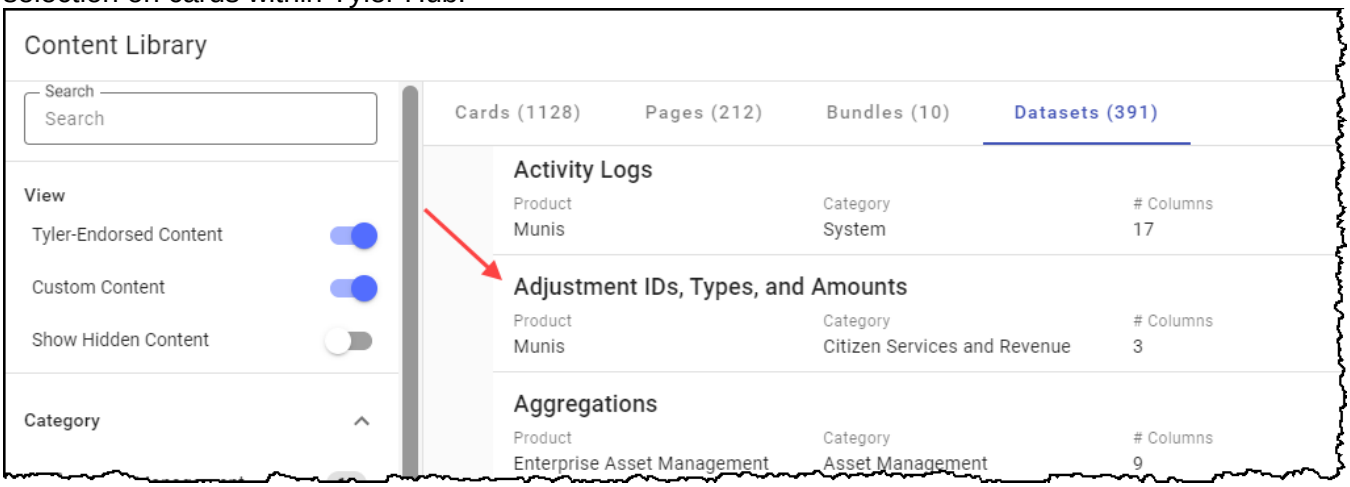


Using this dialog box, you can assign a custom name and description for the dataset, and then specify the fields to include. When you click Next, the Customize Field Display Names dialog box provides the Edit Display name field that you can use to customize the field names.



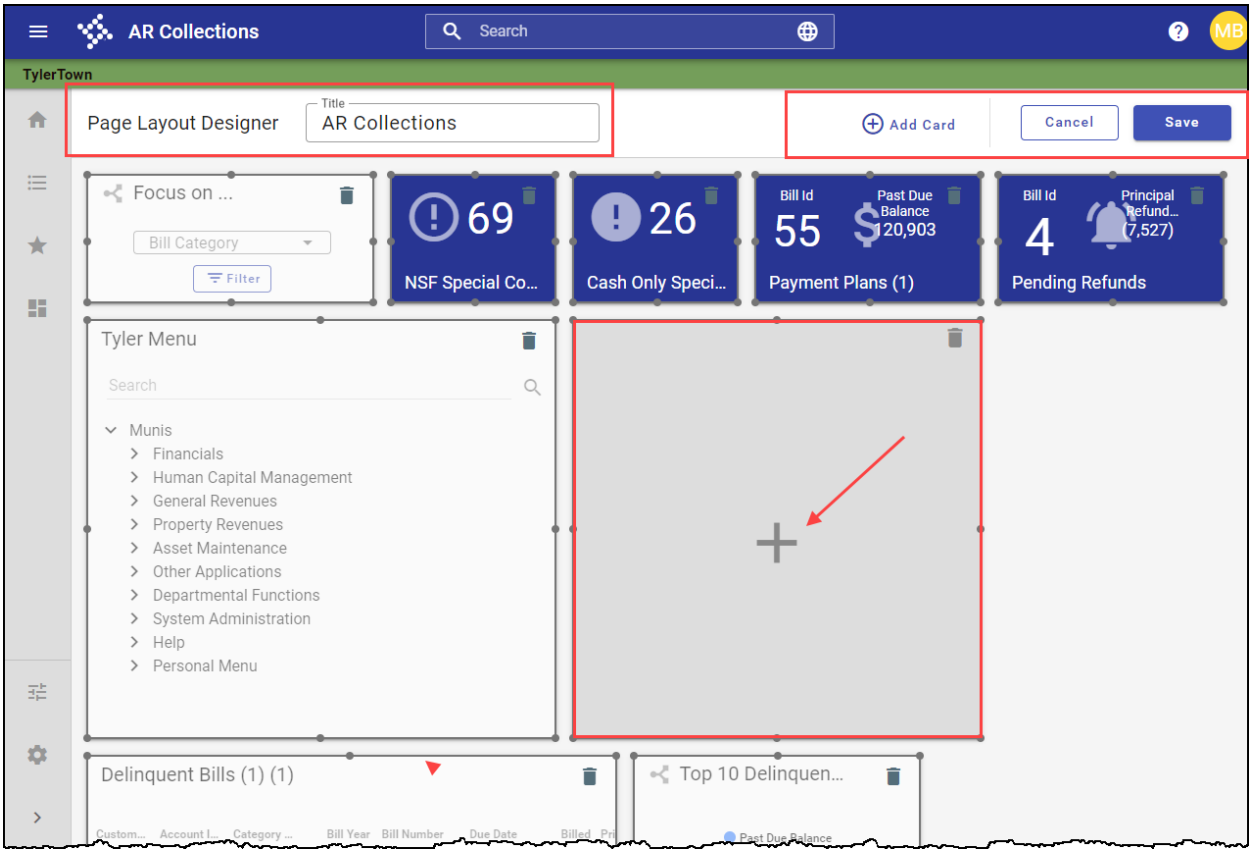




After assigning field names, clicking Next presents the Review dialog box. After reviewing the dataset, clicking Save makes the custom dataset available on the Datasets tab and available for selection on cards within Tyler Hub.



# Page Layout

Page Layout presents the active page in page layout format. Using the Page Layout Designer, you can resize or relocate cards on the page, you can add additional cards, and you can change the page title. The Page Layout option is not available for pages that have read-only functionality.




For the overall page:

- Use the Title box to change the name of the page.
- Click the Add Card button to add an additional card.
- Click Save to save and apply your changes.

For each individual card:

- Click and drag the right side, bottom edge, or lower-right corner of a card to change the size. The Hub maintains a minimal size requirement for each card to ensure that the information remains legible.
- Click a card and drag it to a new location on the page.
- Click the Delete button to remove a card from the page.

To customize a card, click the Add ( + ) button in the center of a blank card to use a guided process for adding or creating a new card. The Add a New Card screen includes the Add Card from Library and Create New Card options:

- Add Card from Library option opens the Content Library that you can use as-is or customize to meet your needs.
- Create New Card option to open the Card Designer to a create a custom card.

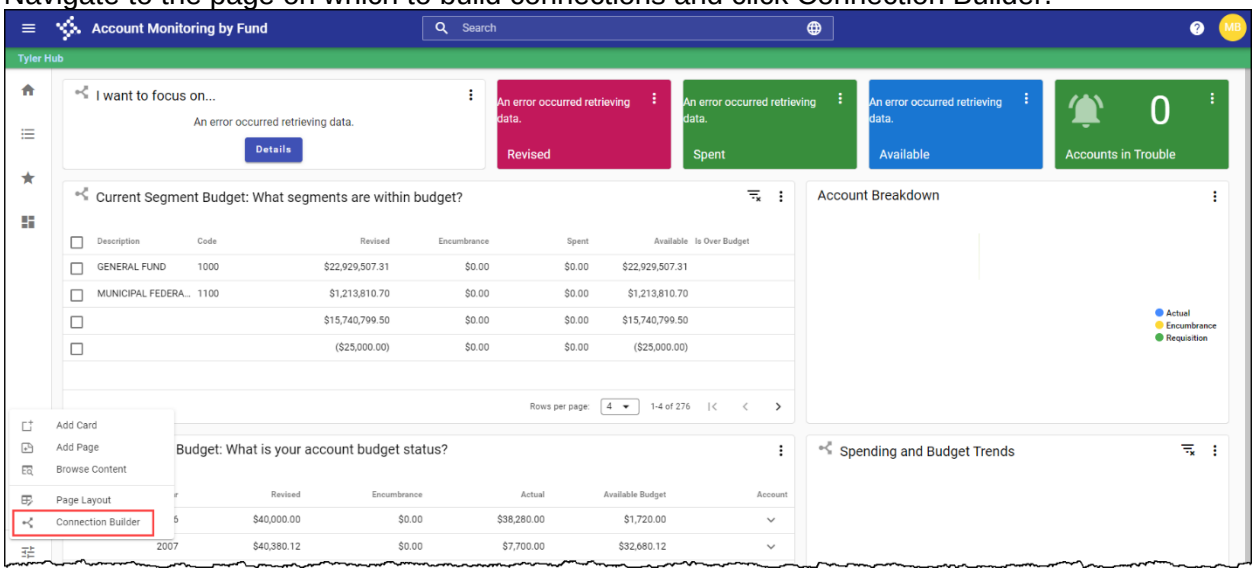
# Connection Builder

Connection Builder creates data connections between cards. Connected cards are identified as origin or receiving cards. There can only be one origin card but there can be multiple receiving cards.

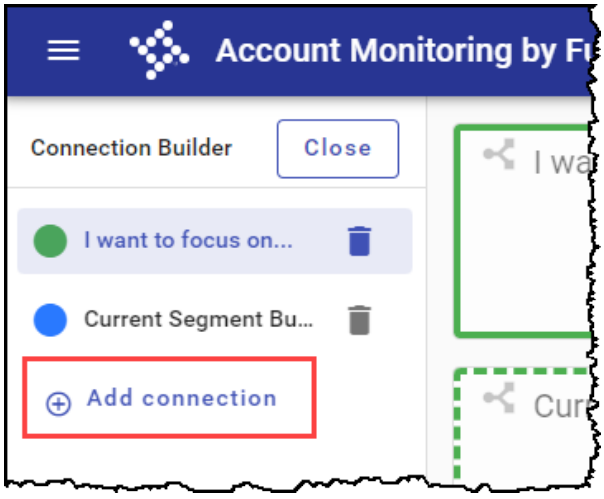
The origin card of a connection cannot be changed since an origin card defines a connection. If you need to change the origin card of a connection, you must add a new connection.

To build connections for a page:

1. Navigate to the page on which to build connections and click Connection Builder.

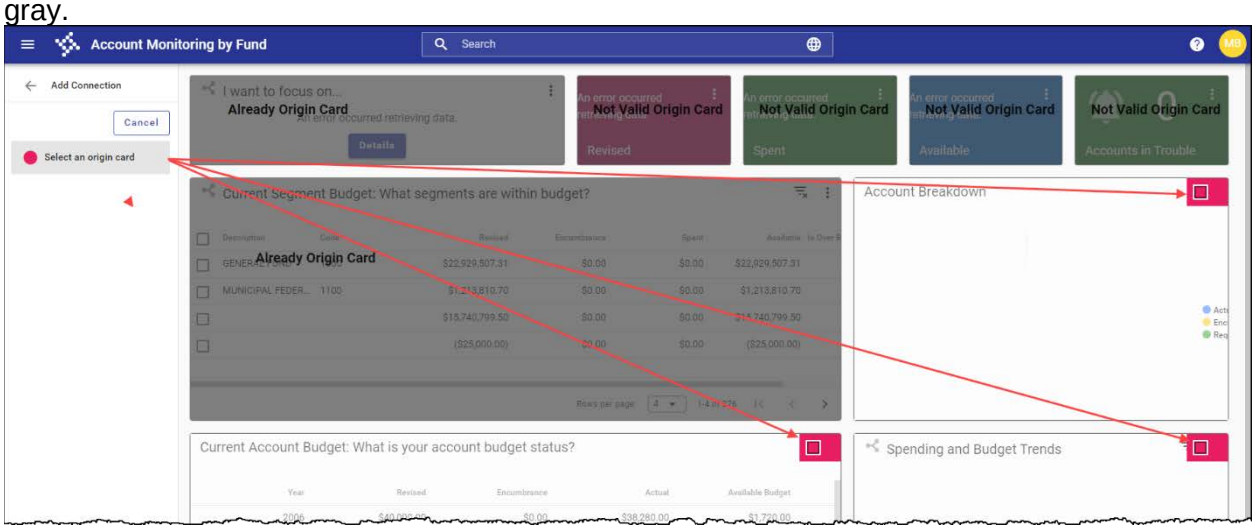



2. Click Add Connection in the Connection Builder group on the sidebar.

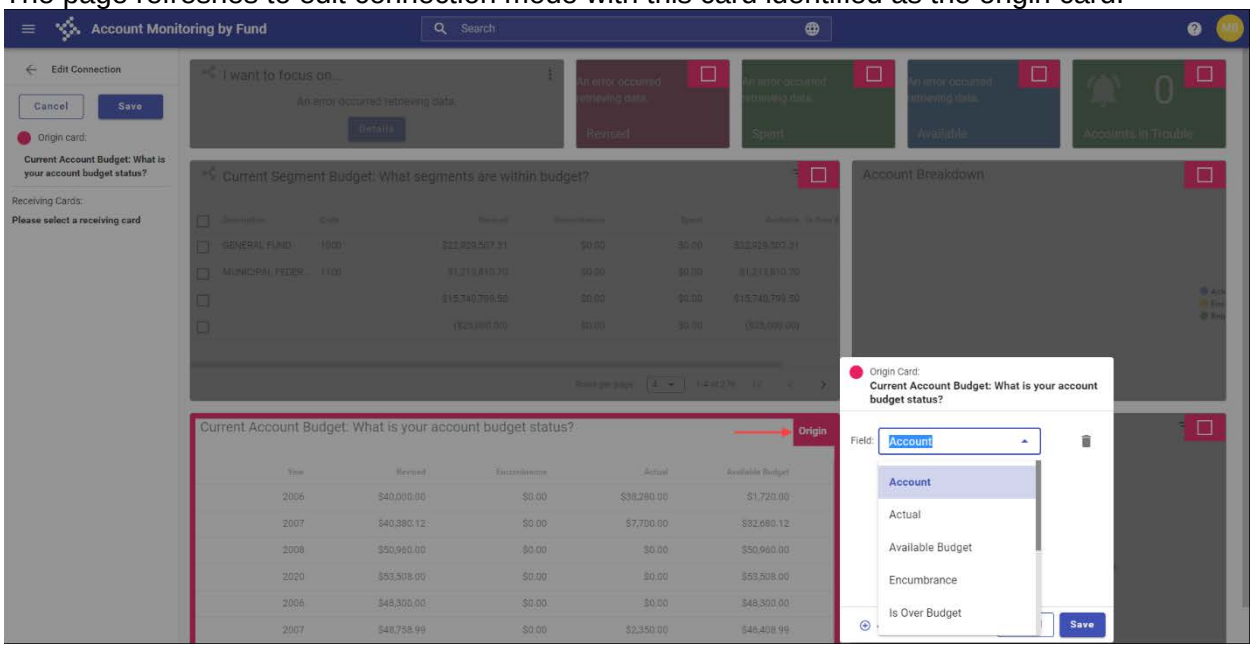



3. Select an origin card.
   Cards with check boxes are available to choose as an origin card. You cannot add a connection for an origin card that already has a connection so only cards that are not already an origin card have check boxes. All cards that are already origin cards display as

gray.

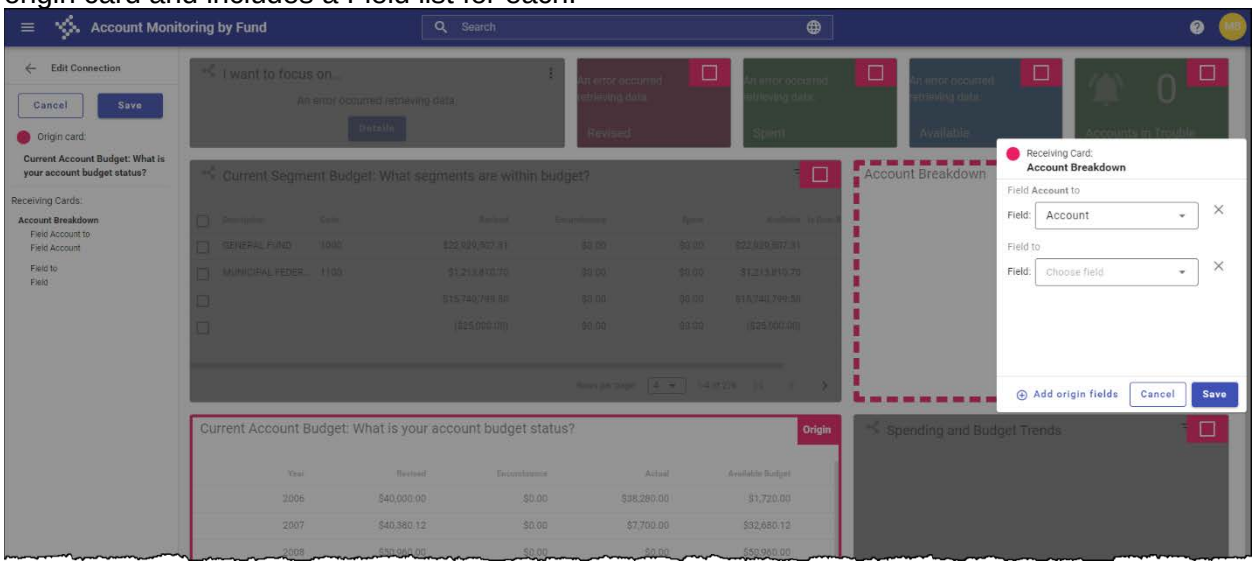



4. Select the check box for a card to designate it as the origin card.
   The page refreshes to edit connection mode with this card identified as the origin card.

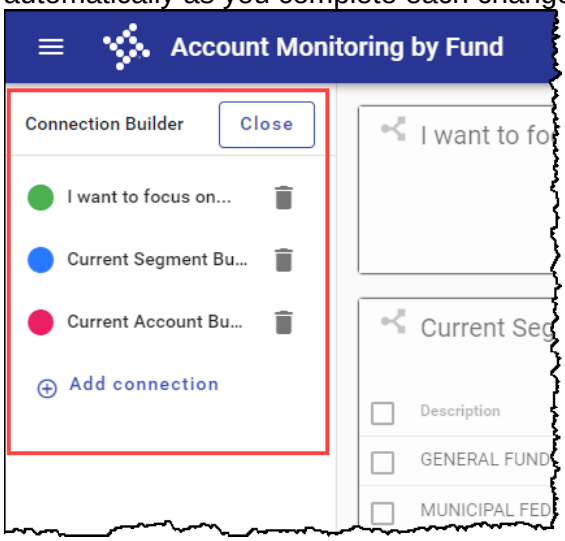



5. In the Origin Card dialog box, select the fields for which to map data to receiving cards.
6. Click Save.
7. Select a receiving card by clicking the available check box.
   The card refreshes to provide the Field dialog box, which lists all of the fields selected on the

origin card and includes a Field list for each.




8. For each origin card field, assign the mapped field for the receiving card.
9. Click Save.
10. Add as many receiving cards as applicable.
    The Configuration Builder list on the sidebar tracks each card and field addition, updating automatically as you complete each change.




Once connections have been created, when you select Connection Builder for a page, the page refreshes to identify the origin card, receiving cards, and cards that can become receiving cards. The origin card has solid outline and all receiving cards have dashed outlines. Any cards that display in gray are not currently part of the connection. Any cards on the page that cannot be connected are also identified.

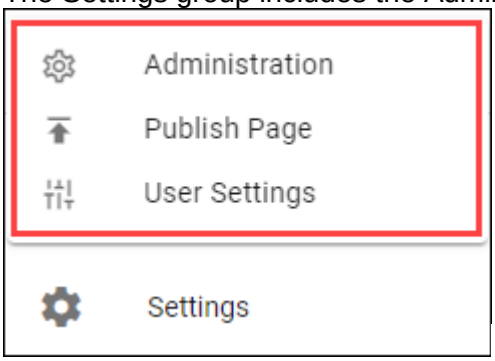
- To edit existing connections, in the Connection Builder group on the sidebar, click the More ( ⋮ ) button to display the Edit and Delete options. When you click Edit, the connections list in the sidebar displays the field names for each connection.
- To remove a receiving card from the connection, clear the Receiving check box on the Connection Builder page.

- To add a receiving card to a connection, on the Connection Builder page, select the check box for the card. Once the card is activated, click the card to display the Field dialog box. For each field included in the origin card, assign a mapped field for the receiving card.
- To add a field to the origin card, use the Add Field option in the Field dialog box. You cannot add new fields to a receiving card. The fields on a receiving card must match the origin card.
- To delete fields from an origin card, use the Delete button for the individual field in the Field dialog box. When you remove a field from the origin card, the Connection Builder list refreshes to show that the field is also removed from the associated receiving cards.
- If you edit an origin card field by selecting a new value, the receiving cards are updated to show the new value. Update the receiving cards as required to provide the correct mapping to the updated origin field.

In Connection Builder, you can set up connections to filter from the User Links, Favorites, and Content Pages cards to a connected Content Viewer card. No fields are required to connect these cards to the content viewer cards.

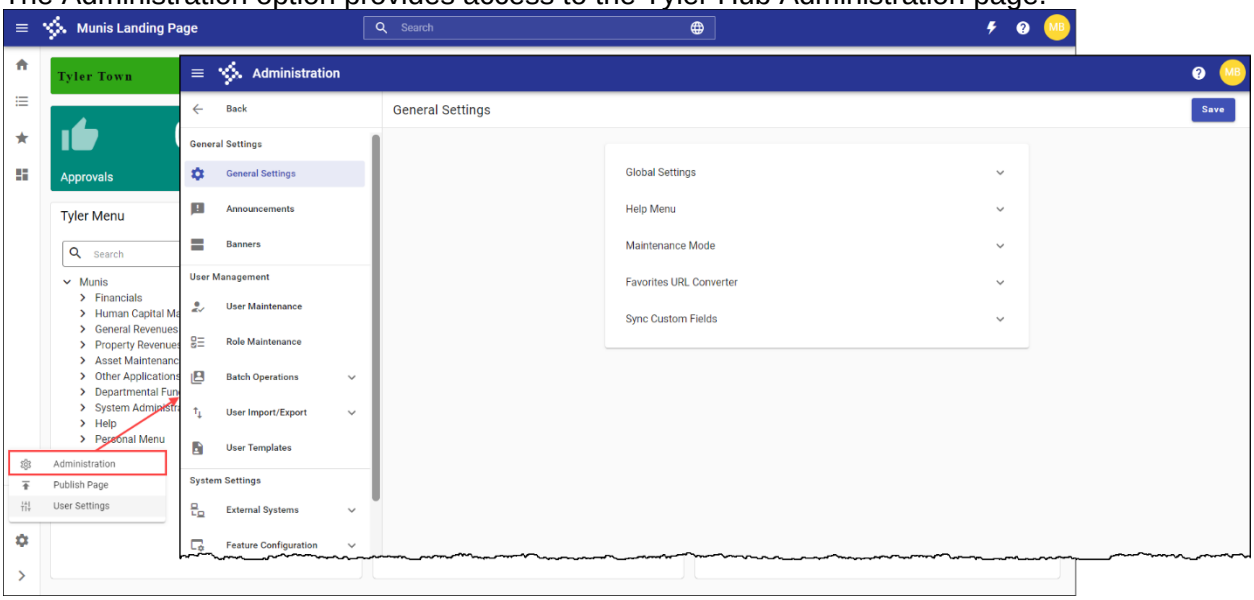
# Settings

The Settings group includes the Administration, Publish Page, and User Settings options.




## Administration

The Administration option provides access to the Tyler Hub Administration page.



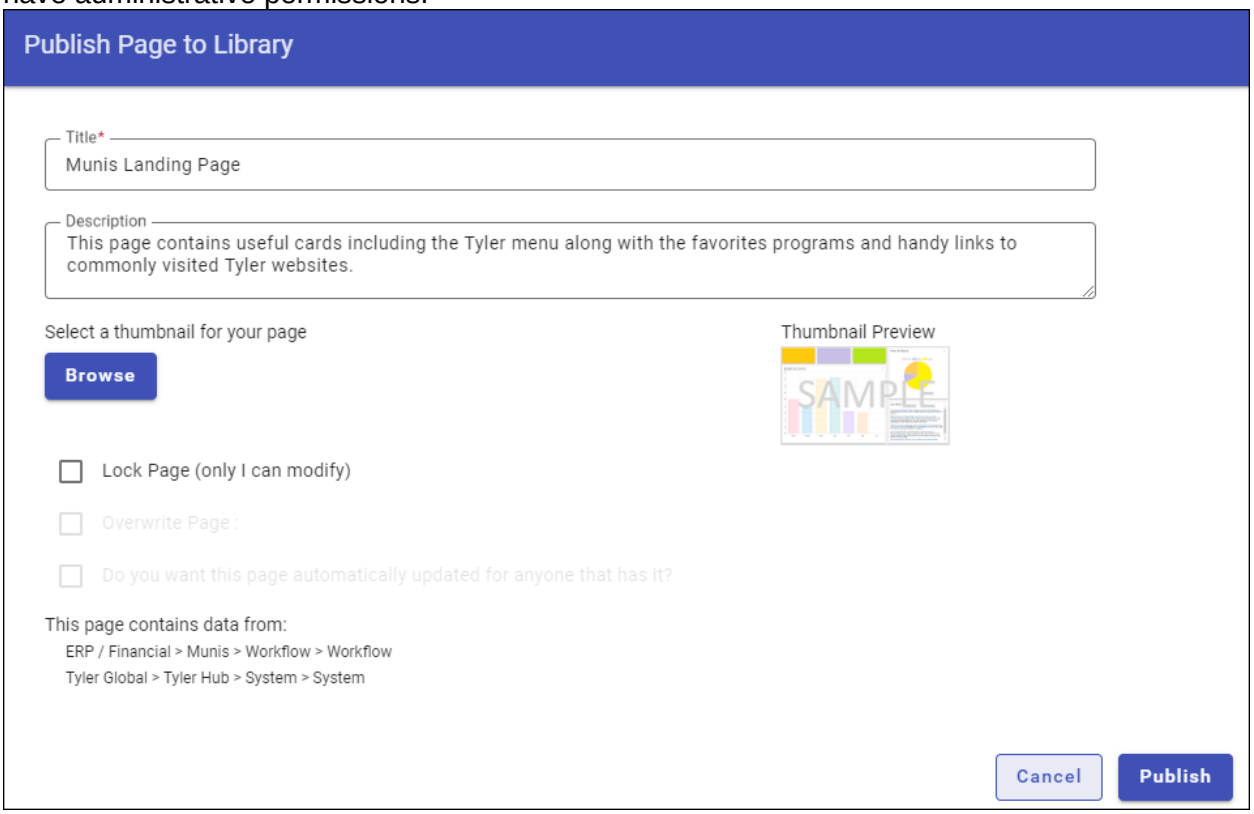

Only users with administrative access have access to this option. For most users, this option is not available.

The Tyler Hub Administration page is where administrators can establish and maintain settings related to system-wide processes, such as diagnostics, users, roles, data access, Tyler University, banners, maps, external systems, and Tyler Identity.

Refer to the *Tyler Hub Administration Guide* document found in the Tyler Hub group of Tyler Community for more information about the Administration page.

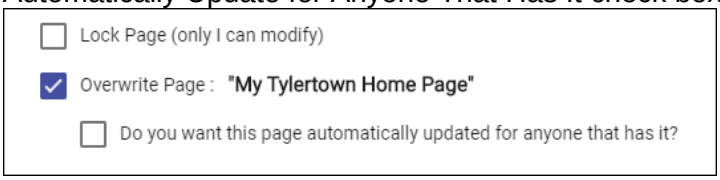
# Publish Page

The Publish Page option publishes a page to the Content Library where it is available for use by other Hub users. Other users cannot delete pages you add to the Content Library unless they have administrative permissions.

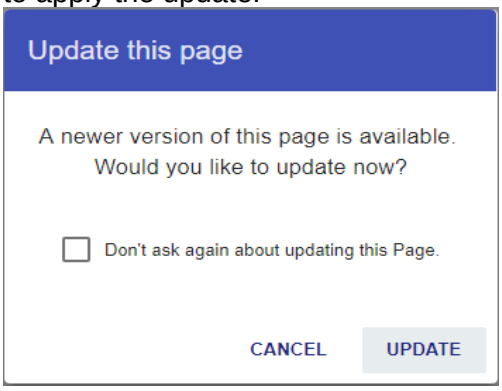



The Lock Page (Only I Can Modify) option publishes pages with read-only functionality. Such pages and the cards they contain cannot be modified or published by other users.

The Overwrite Page option replaces pages you have previously published. It is not accessible for Tyler pages or the Home page. You cannot overwrite other users' pages unless you have appropriate permissions. When you select this check box, the Do You Want This Page Automatically Update for Anyone That Has It check box is accessible.



If you select this option, users who have added the page receive a notification that a newer version of the page exists and the update is automatically applied. If you do not select this option, users receive a notification that a newer version of the page exists and they can choose to apply the update.

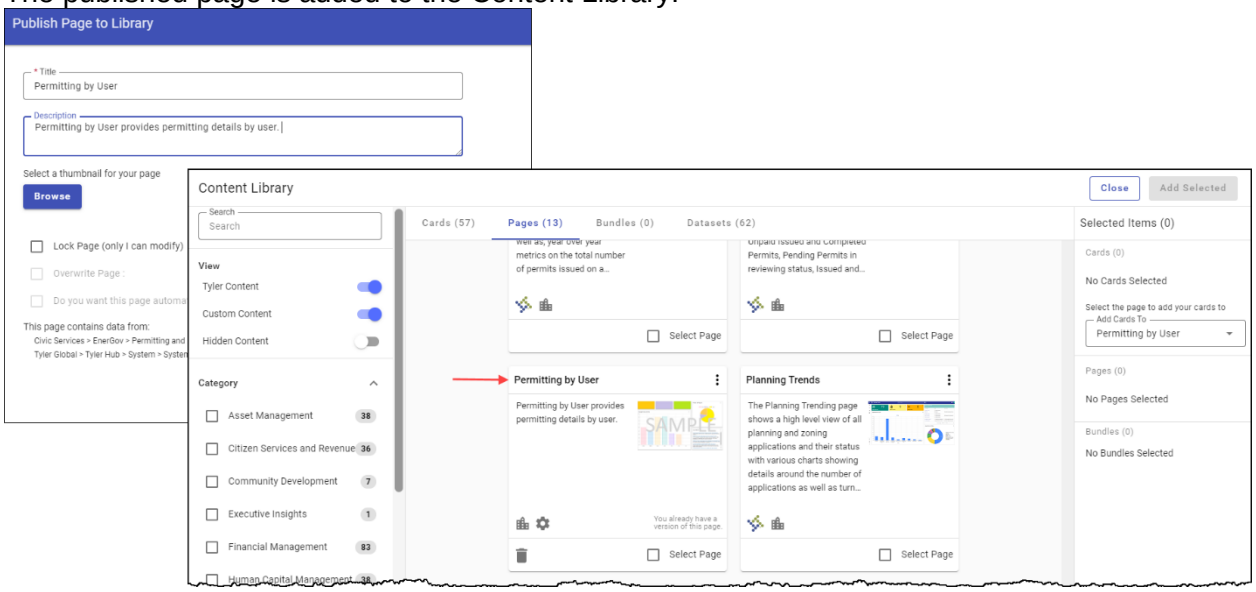



## Publishing a Page to the Content Library

When you publish a page to the Content Library, any user can access that page and add it to their collection of Tyler Hub pages. To publish a page to the Content Library:

1. From the page to publish, click Publish Page.
   The system displays the Publish Page to Library dialog box.
2. Complete the fields as required. A custom thumbnail image is optional.
3. Select the Lock Page check box to prevent other users from modifying the page.
4. Select the Overwrite Page check box to replace a page that you have previously published. You cannot overwrite other users' pages unless you have appropriate permissions, and you cannot overwrite a Tyler page or home page.
5. When the Overwrite Page setting is enabled, select the Do You Want this Page Automatically Updated for Anyone Who Has It check box to enable automatic updates for the page for all users who add it. If you select this option, users who have added the page receive a notification that a newer version of the page exists and the update is automatically applied. If you do not select this option, users receive a notification that a newer version of the page exists and they can choose to apply the update.
6. Click Publish to publish your page to the Content Library.
   The program displays a confirmation message.

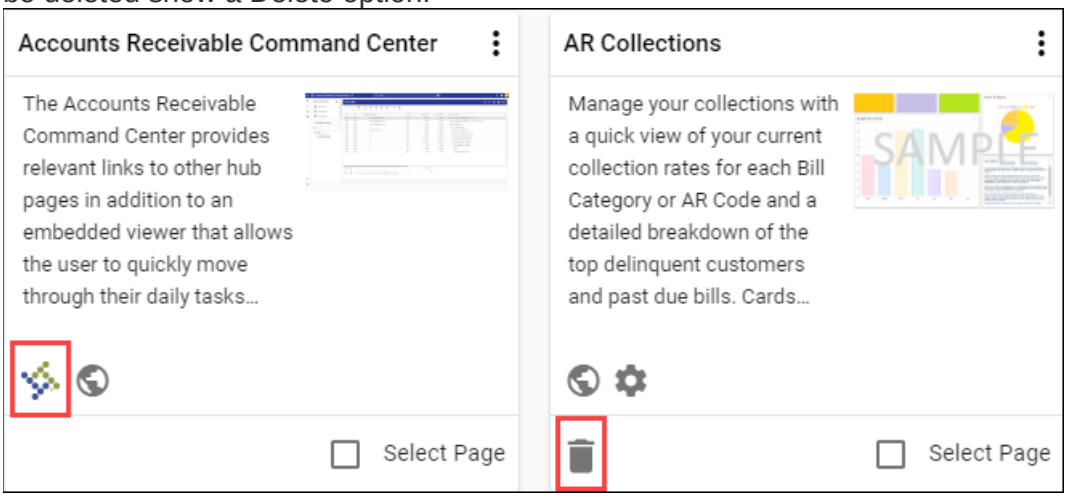
7. Click OK.
   The published page is added to the Content Library.




When you access the Content Library, the published page is available in the Pages tab, sorted according to the category you defined.

## Deleting a Page from the Content Library

Pages can only be deleted from the Content Library by the author of the page and by users with administrative privileges. You cannot delete pages that feature the Tyler logo. Pages that can be deleted show a Delete option.

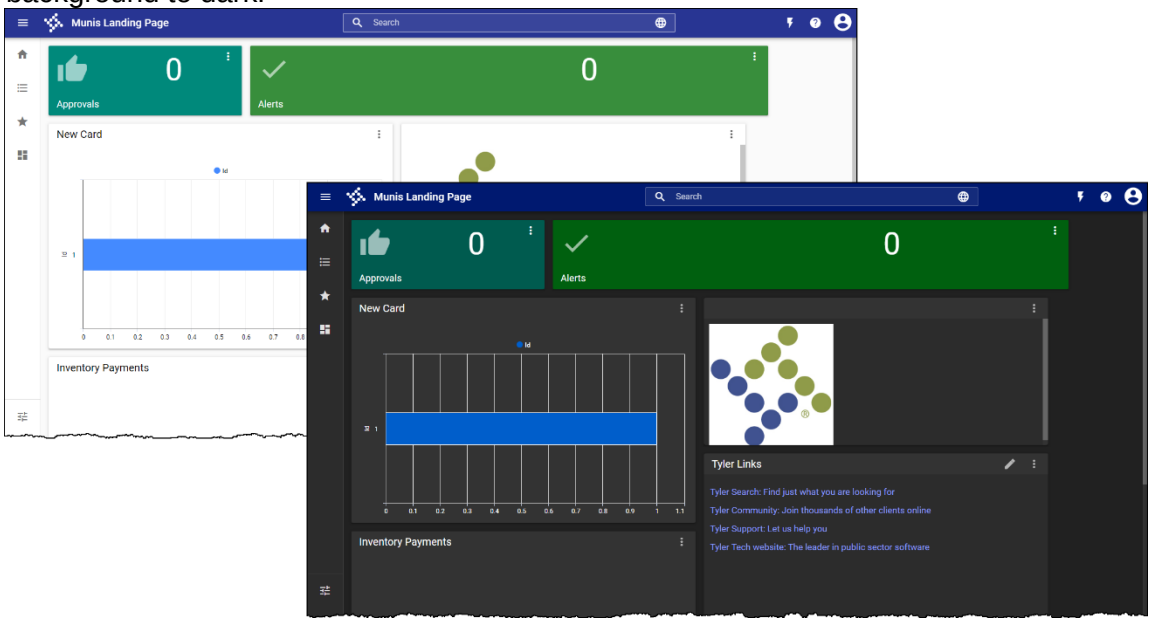



To delete a page, navigate to the page in the Content Library and click the Delete button.

# User Settings

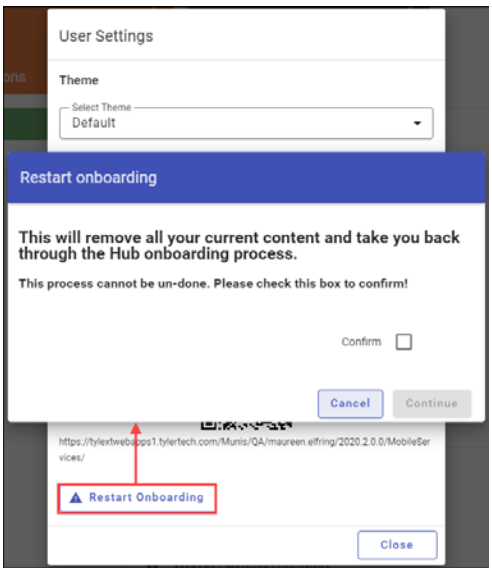
The User Settings dialog box includes the Theme, Pages, and Mobile QR Code groups, along with the Restart Onboarding selection. The Pages group includes the Home Page and Edit Pages options.

- The Theme option assigns a light or dark background to the Tyler Hub application. The default option is Default, which presents the light background. Select Dark to reset the background to dark.



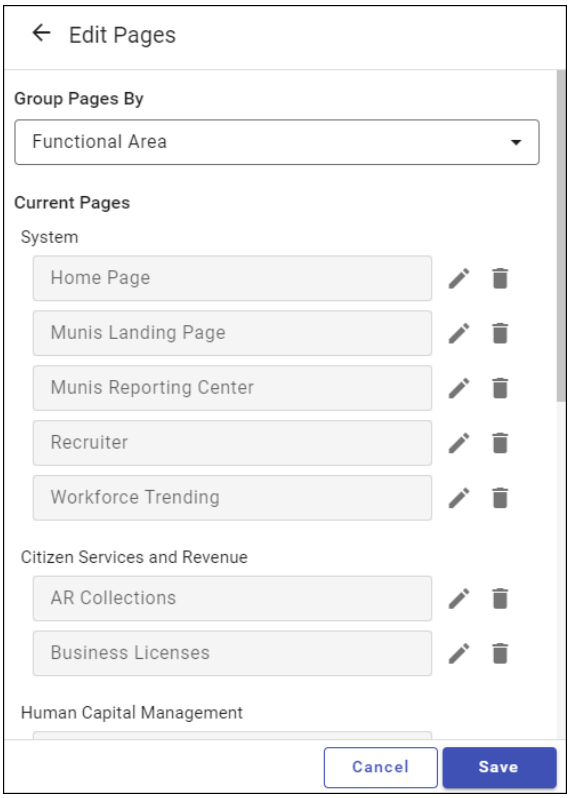

The Select Theme option is only available when the Enable Theming setting is enabled in Administration in the Global Settings group on the General tab.

- The Home Page list sets the home page for your Tyler Hub application.
- The Mobile QR Code provides the Munis mobile QR code, which is applicable for use with Munis mobile applications.
- The Restart Onboarding option provides step-by-step instructions for resetting your Hub pages and cards.




Select the Confirm check box and then click Continue to begin the onboarding process again. See the Onboarding content for more information.

Edit Pages provides options for grouping pages on the sidebar, renaming pages, and deleting pages from your Hub content.



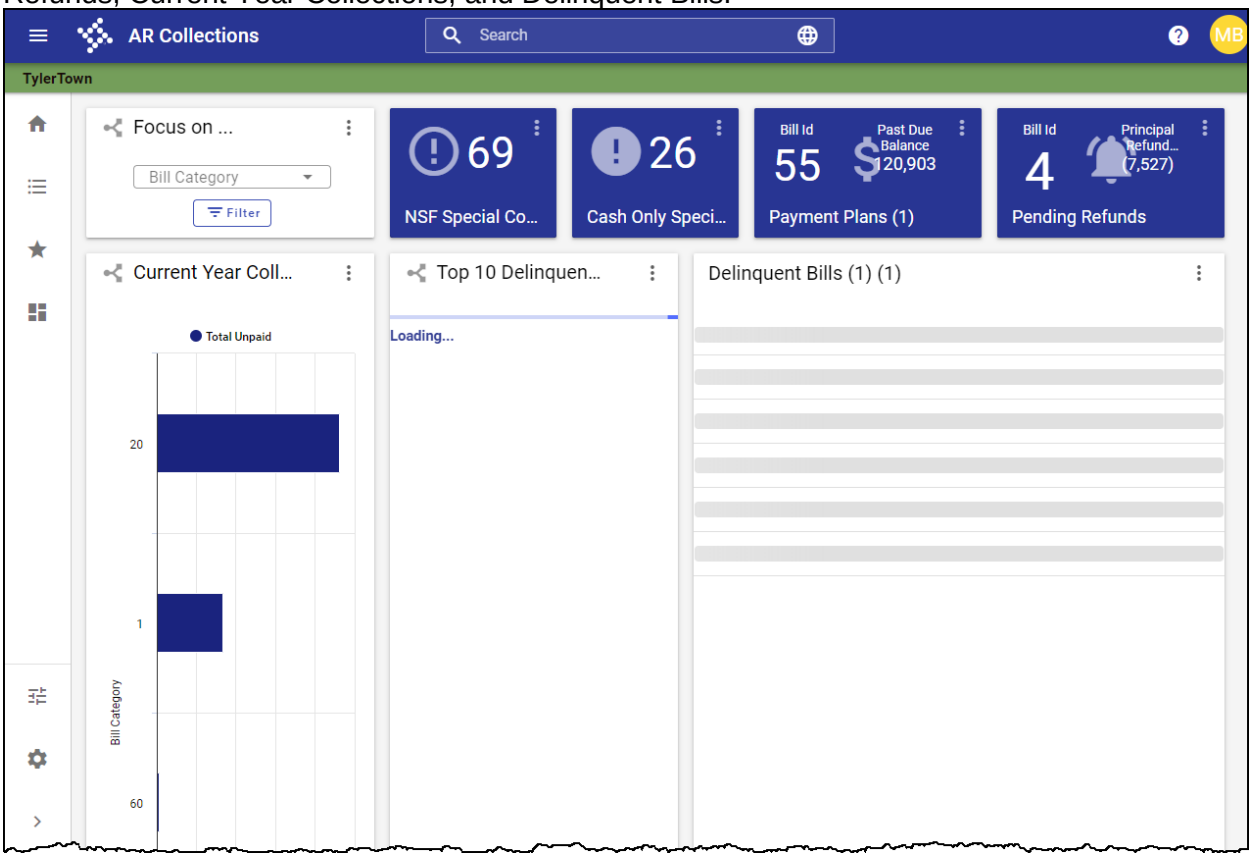

The Group Pages By list groups pages by Solution, Product, Functional Area, and Module:

- Solution—The product level category (for example, ERP/Financial)
- Product—A Tyler product (for example, Munis)
- Functional Area—A category within a product (for example, Munis Financial Management)
- Module—An Application module within a product (for example, Munis Accounts Payable).

The Current Pages group provides a list of the pages currently added to your Hub application. Clicking the Edit button for an existing page allows you to update the page name. Clicking the Delete button removes the page. Use caution when deleting a page as Tyler Hub does not provide a confirmation message. When you delete a page, the program removes it from your menu, but keeps it available in the Content Library for other users to access or for you to add again later.

# Appendix A—Card Designer

Cards summarize and display data on pages. For example, the AR Collections page can feature several cards, including the NSF Special Conditions Code, Payment Plans, Pending Refunds, Current Year Collections, and Delinquent Bills.




To define the data that cards present and the format for that presentation, use the Card Designer. This appendix provides a summary of using the Card Designer. See the Tyler Hub group of Tyler Community for more detailed documentation.

## Introduction

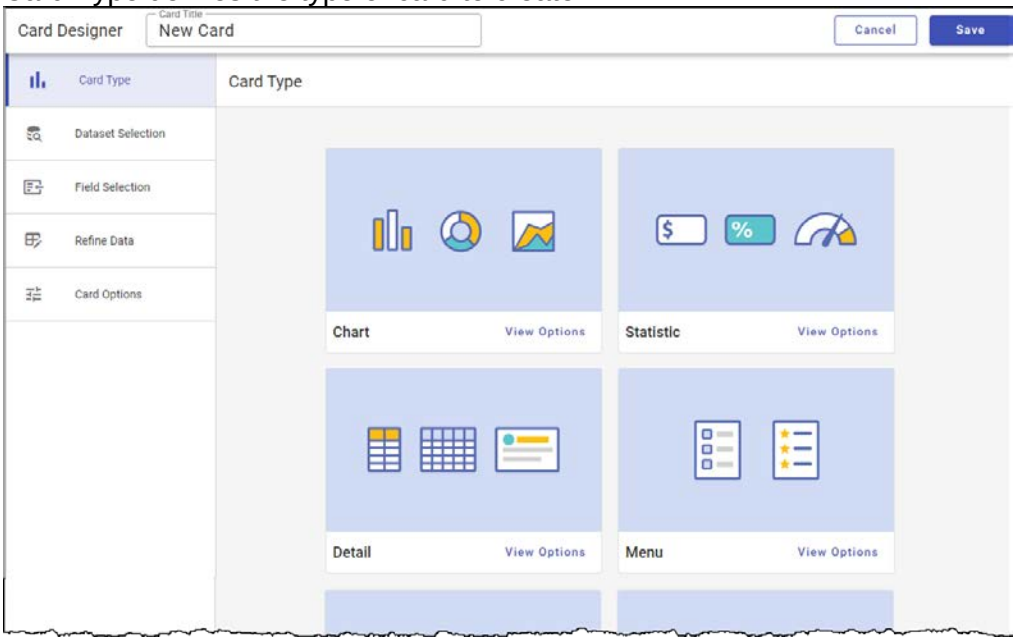
With Card Designer, you can create a new card or update existing cards. Within the designer, you select a card type, define the dataset, and then choose the fields to display on the card.

To access Card Designer, select Add Card from the Edit Content menu and select the Create a New Card option or click the More ( ⋮ ) button on an existing card and select Edit.

The Card Designer consists of the Card Type, Dataset Selection, Field Selection, Refine Data, and Card Options groups.

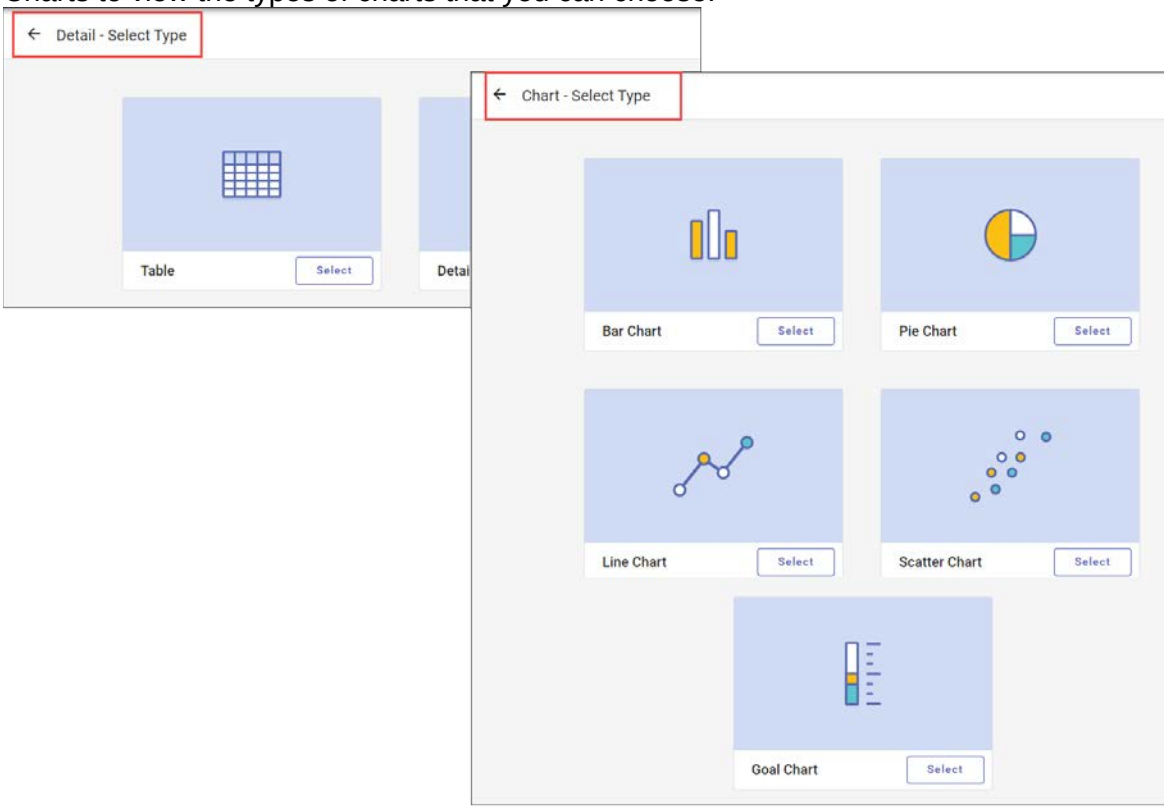
# Card Type

Card Type defines the type of card to create.




Before selecting the card type, use the Card Title field to assign a name to the card.

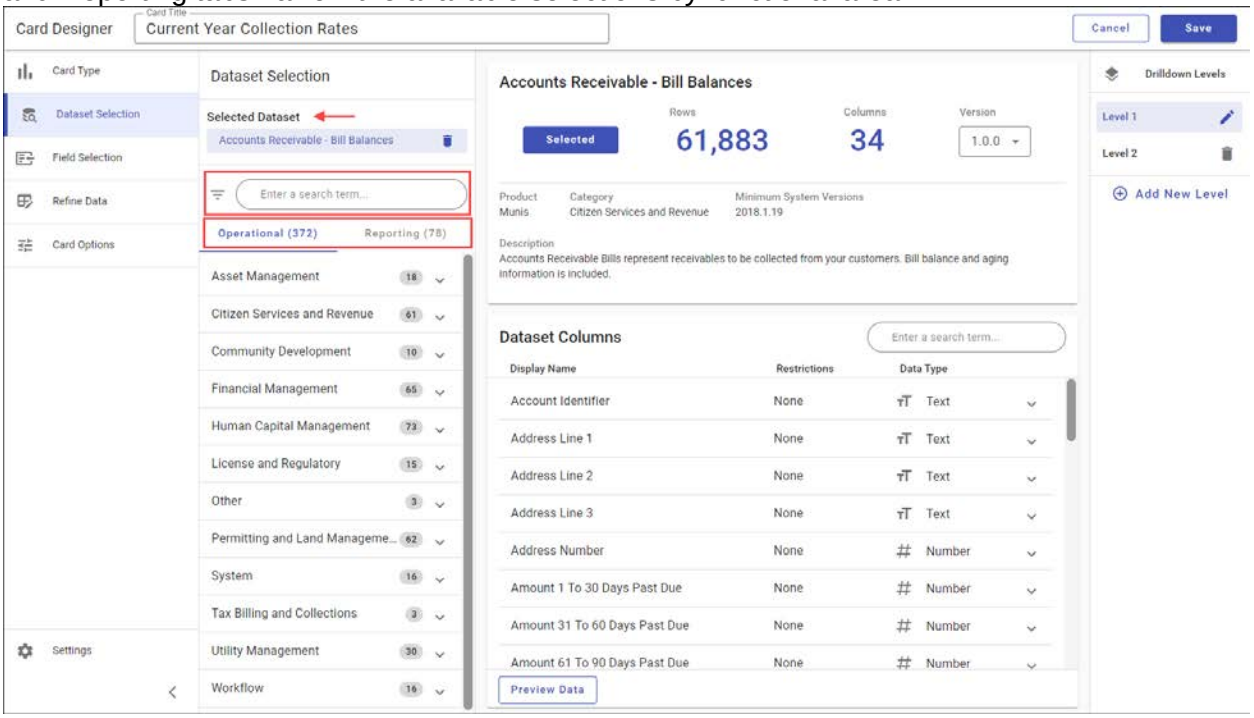
On the Card Type page, select the category and then chose the type of card within that category to create. For example, select the Detail card to view the available detail cards or click Charts to view the types of charts that you can choose.



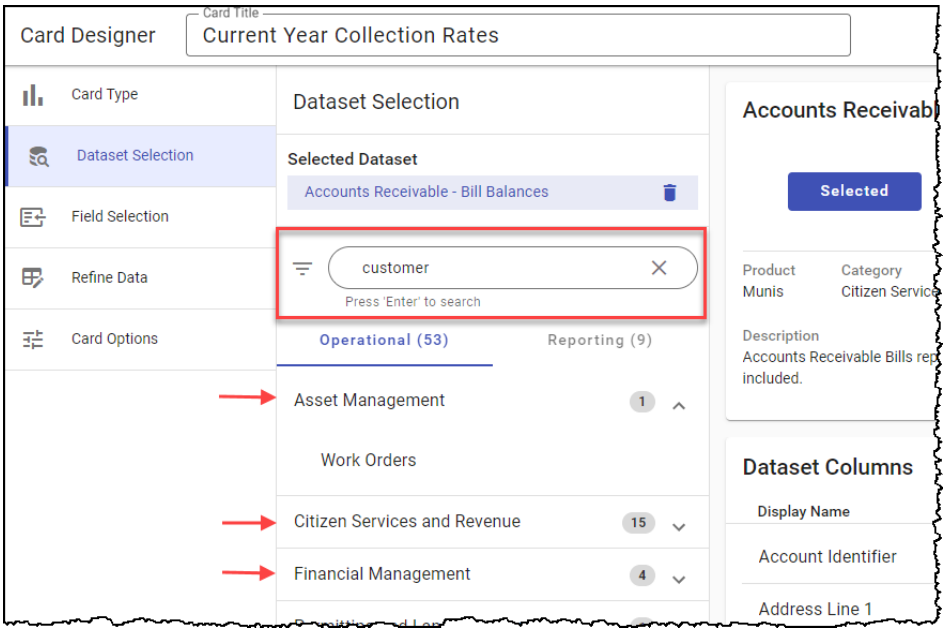
The card type that you select determines the fields and options that are available to you in the remaining card groups.

# Dataset Selection

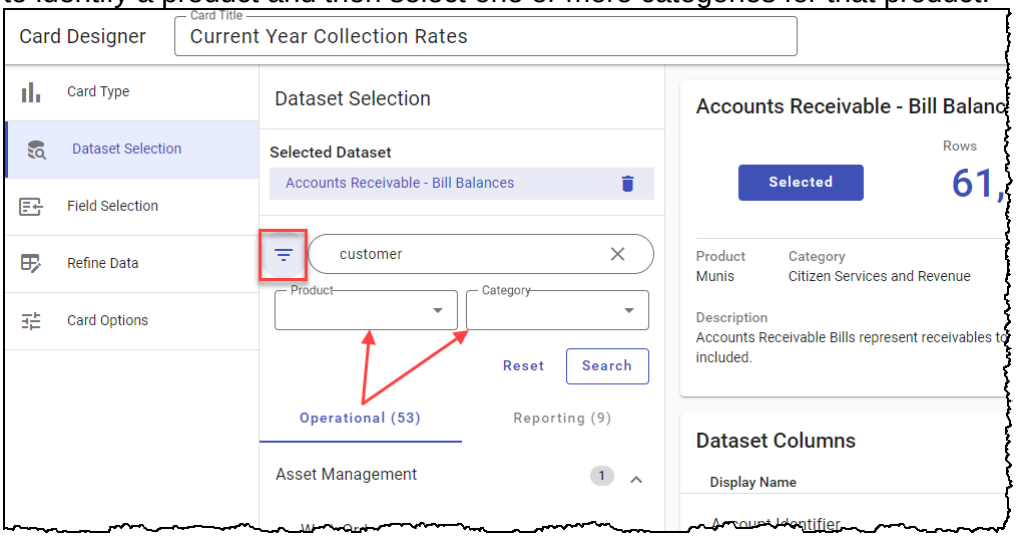
Dataset Selection defines the data to include in the card. The Selected Dataset group identifies the active dataset for the card, the Filter field provides keyword searches, and the Operational and Reporting tabs narrow the available selections by functional area.



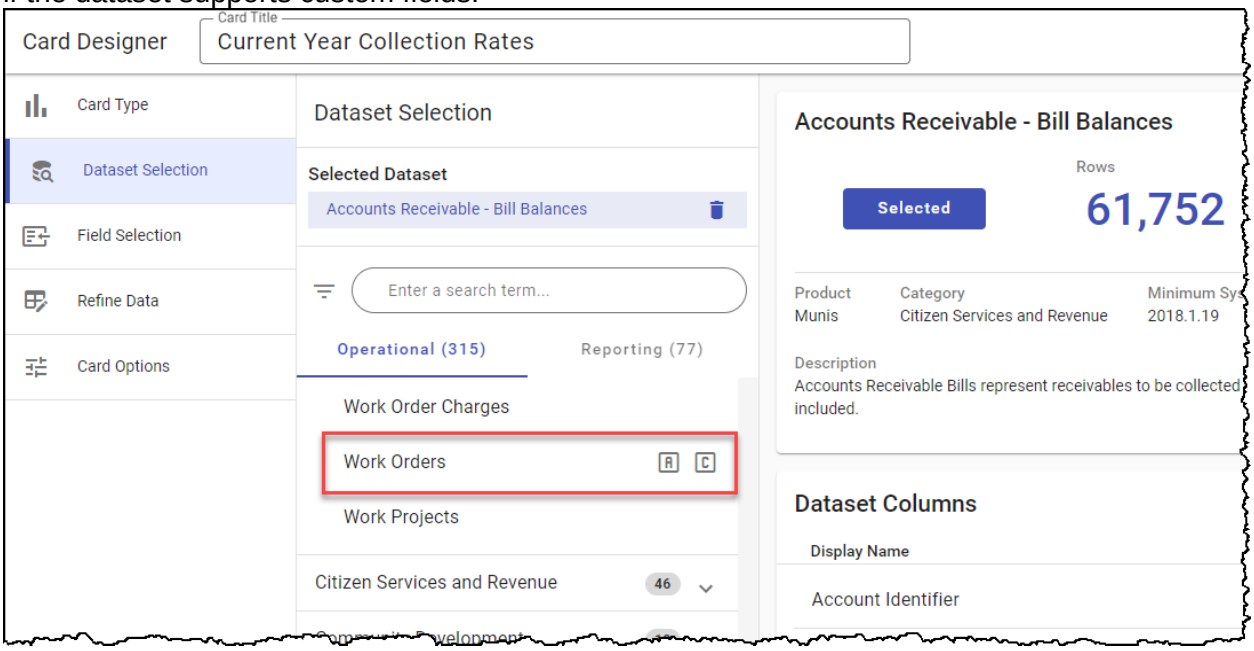

To find a specific dataset, use the filter field to search using keywords. The keyword you enter is evaluated in the dataset name as well as the field names within a dataset.



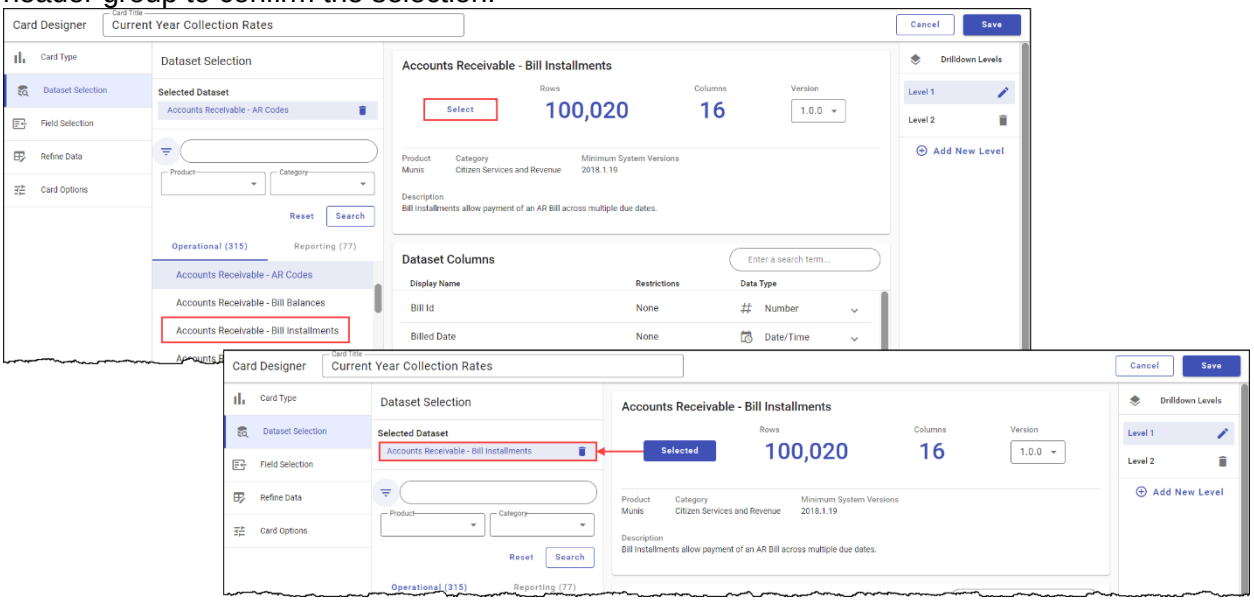
When you click the Filter button, the Product and Category fields are available. Use these fields to identify a product and then select one or more categories for that product.




On the Operational tab, the list of datasets display “A” if the data =set supports actions and “C” if the dataset supports custom fields.



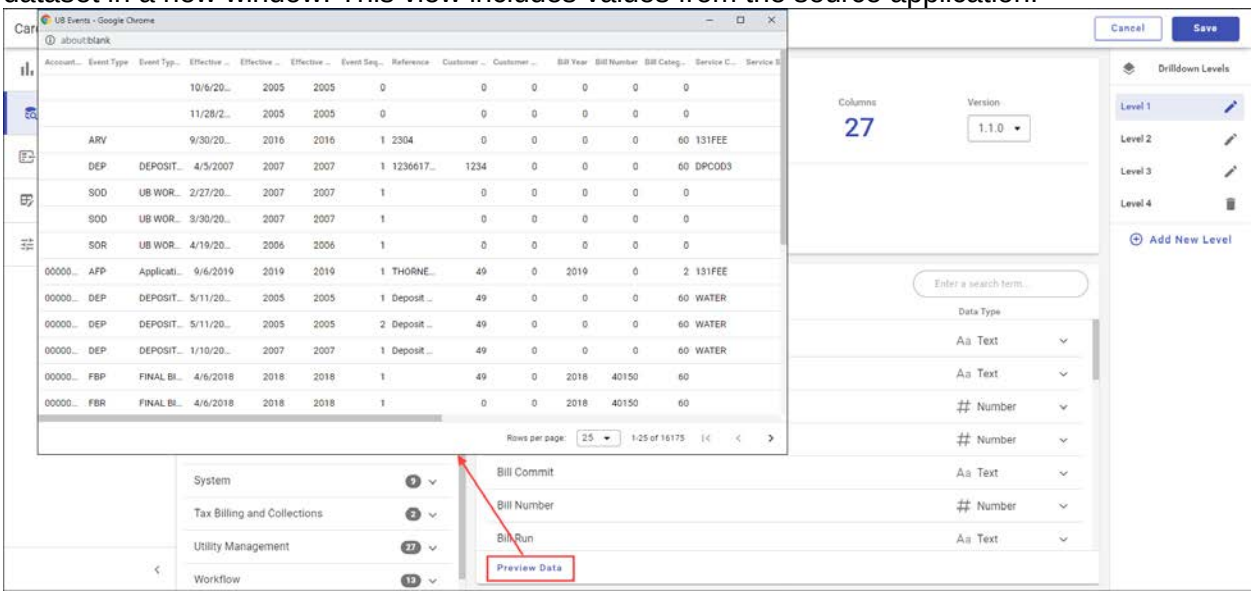
When you select a dataset, the page refreshes to display the details. Click Select in the dataset header group to confirm the selection.




The Dataset Selection page includes the dataset header and Dataset Columns groups:

- The header identifies the number of rows/records, the number of columns/fields, product, category and description of the dataset as well as the version of the dataset.
- The Dataset Column group provides a breakdown of each field included in the dataset, the type of data, and any restrictions that apply. Expand a row to view the field name, format, and description details.

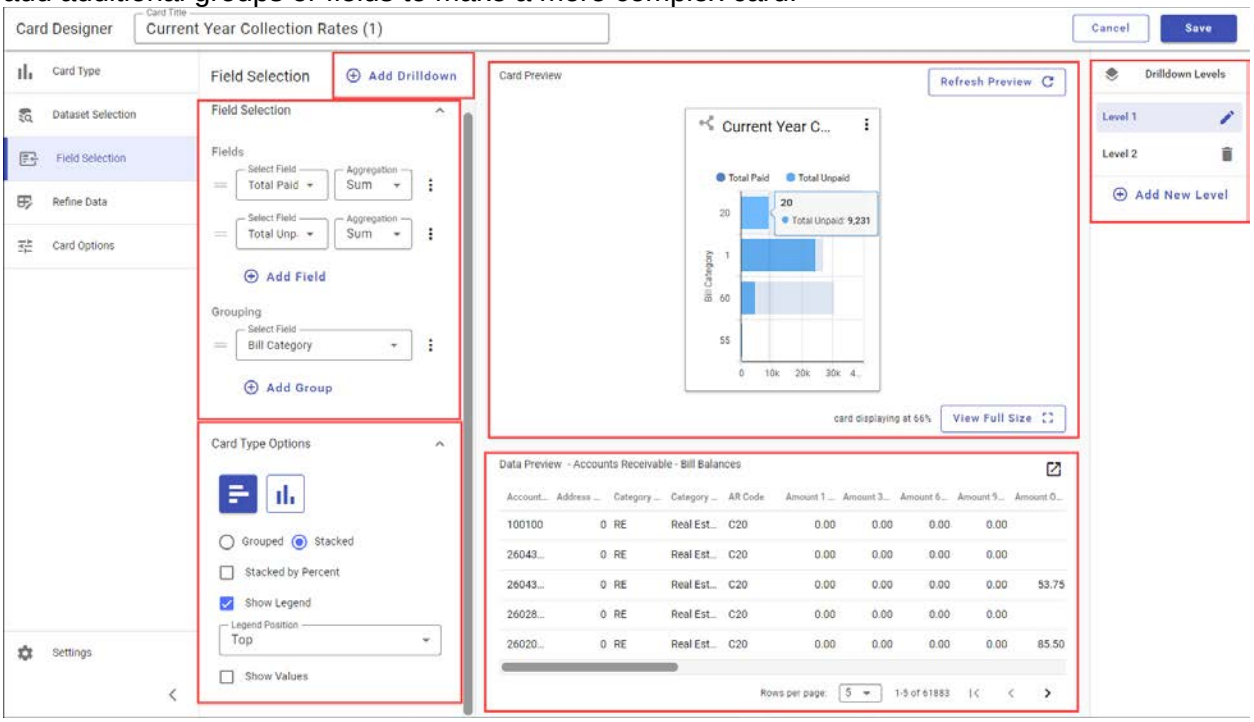
In the Dataset Columns group, click the Preview Data button to display all the fields in the dataset in a new window. This view includes values from the source application.



# Field Selection

Field Selection provides the requirements for the card type selected as well as any visualization options for that card type. The Fields lists identify the fields for which to display data and the Grouping list indicates what to display on the X or Y axis of the resulting visualization (such as a chart or graph).

For example, a bar chart card requires at least one field to group on and one field with an aggregation. Populating two placeholders in this step results in a working bar chart. You can add additional groups or fields to make a more complex card.




In the Field Selections group, click the More ( ⋮ ) button for the Fields or Grouping lists to access the Edit and Delete options. Depending on the card and field type, when you select Edit Options, the Edit Field Options dialog box provides one or more of the following fields, which define the card presentation and data linking:

- Label—Assigns a user-defined label for the field.
- Data Format—Determines how field data format, for example, decimal or percent. Select None for plain text.
- Column Width—Sets the column width.
- Open Link In—Defines how linked data is presented, for example, in a new dialog box or tab.
- Link Columns To—Links the field to one or more URL fields.
- Group Table by this Field—If selected, fields within the data table are grouped by the selected field. This option is only applicable to data table cards.

When you click the Delete option, the field is removed without presenting a confirmation message.

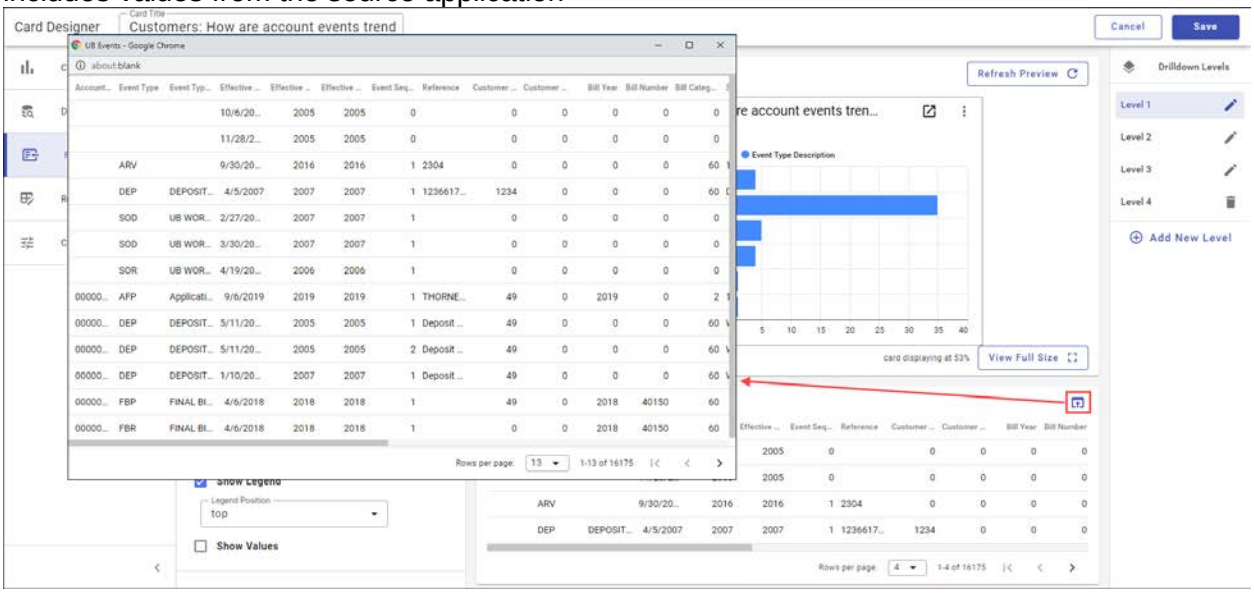
Card Type Options define how the finished card is presented. For example, selecting the orientation for a bar chart, adding icons, or showing/hiding a legend are just a few of the customizable options you can configure on this page.

For links or favorites cards, clicking the More ( ⋮ ) button for each link and then selecting Edit allows you to assign an individual icon for each link on the card.

When applicable, the Enable Actions check box determines if data tables within the card include the Action menu, which allows you to complete tasks in related programs.

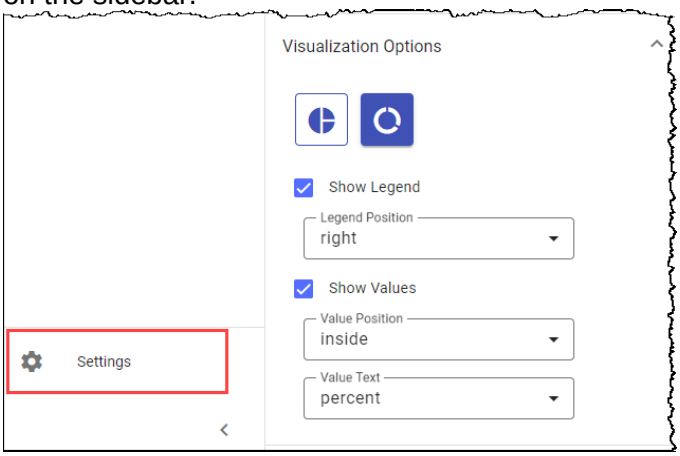
The Card Preview group updates as you define the fields and visualization options. The Card Displaying At field displays the card display percentage. When you click the View Full Size button in the lower-right corner of this section, the Card Preview displays the card at 100%.

The Data Preview sections references the fields included in the dataset and the values for each field. Click the Launch button to display all the fields in the dataset in a new window. This view includes values from the source application

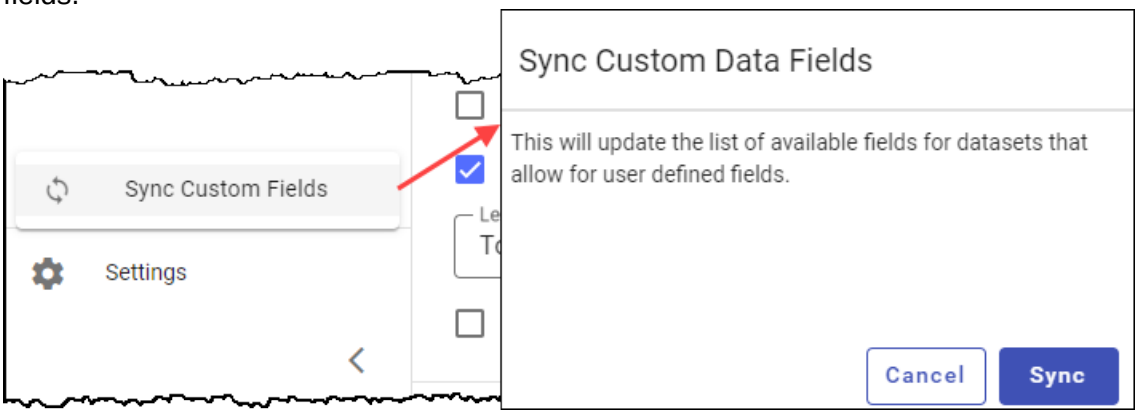


## *Settings*

If you have the appropriate content administration permissions, the Settings option is available on the sidebar.

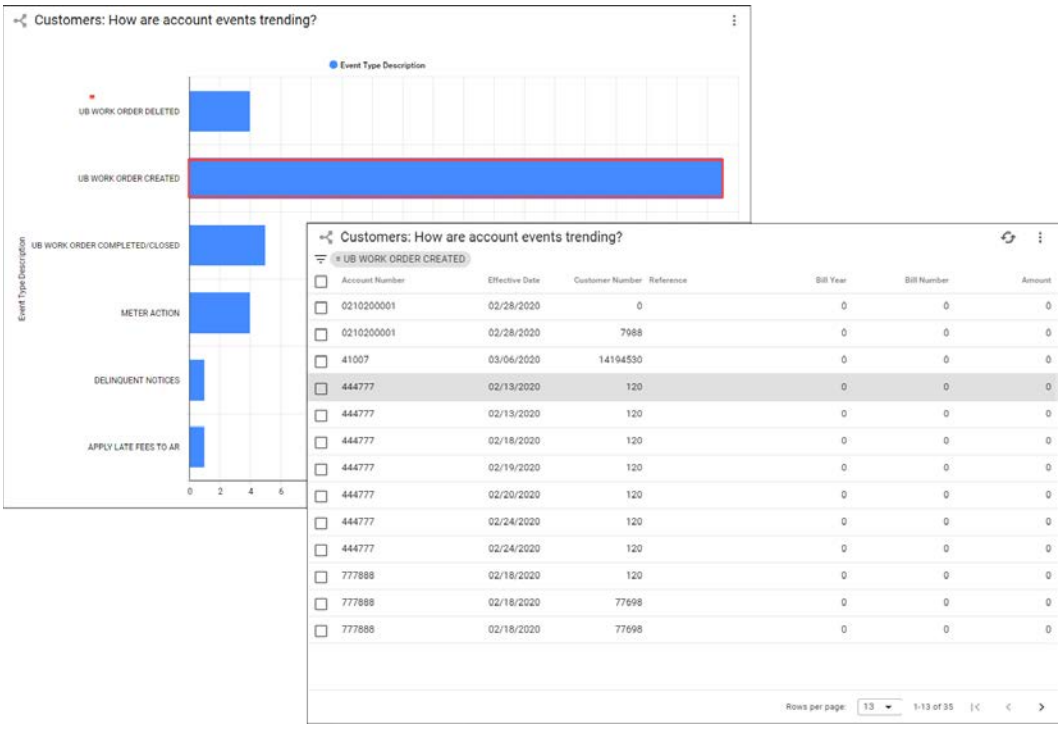



When you select Settings, the Sync Custom Data fields option provides the Sync Custom Data Fields dialog box. Click Sync to update the list of available dataset fields that allow user-defined fields.



## *Drilldowns*

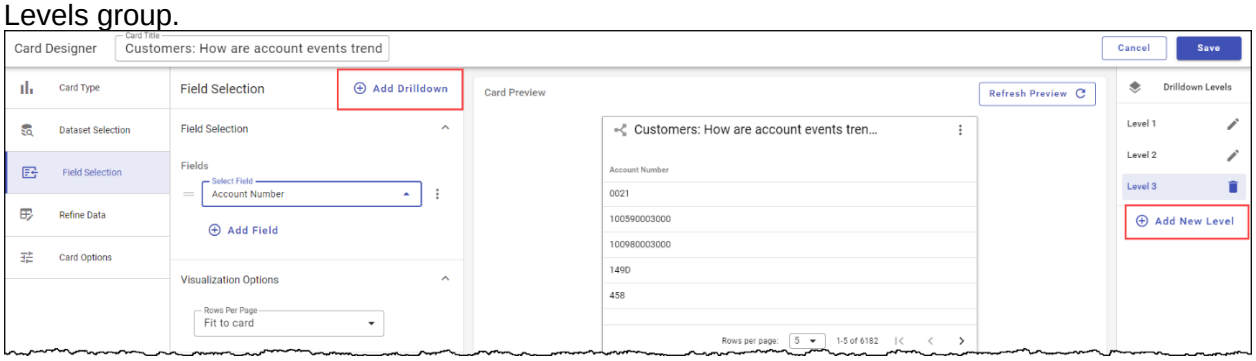
A card can have a connection (or filter) to itself. In this case, when you select a record or value on the card, it exposes additional information for the selected value. For example, selecting a bar on a bar chart would result in the card showing the records that make up the selected bar in a data table.



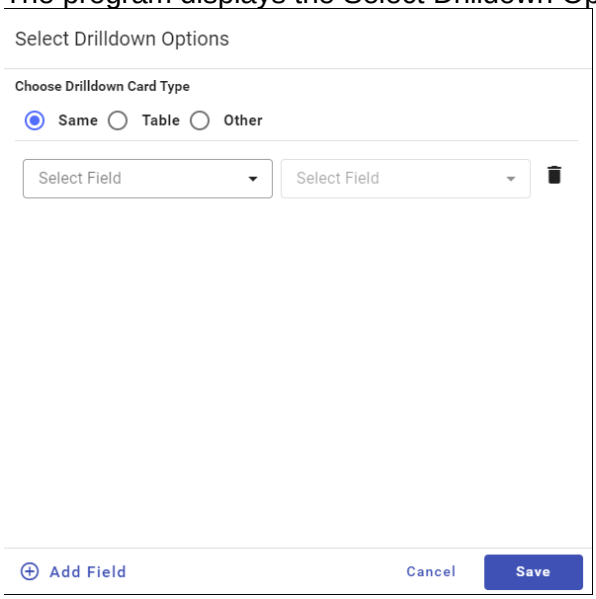

These additional information cards are called drilldowns. To create a drilldown for a card:

To add a drilldown:

1. In the Card Designer for the card to which you are adding a drilldown, display the Field Selection page.
2. Click Add Drilldown in the Field Selection group or click Add New Level in the Drilldown Levels group.



The program displays the Select Drilldown Options dialog box.



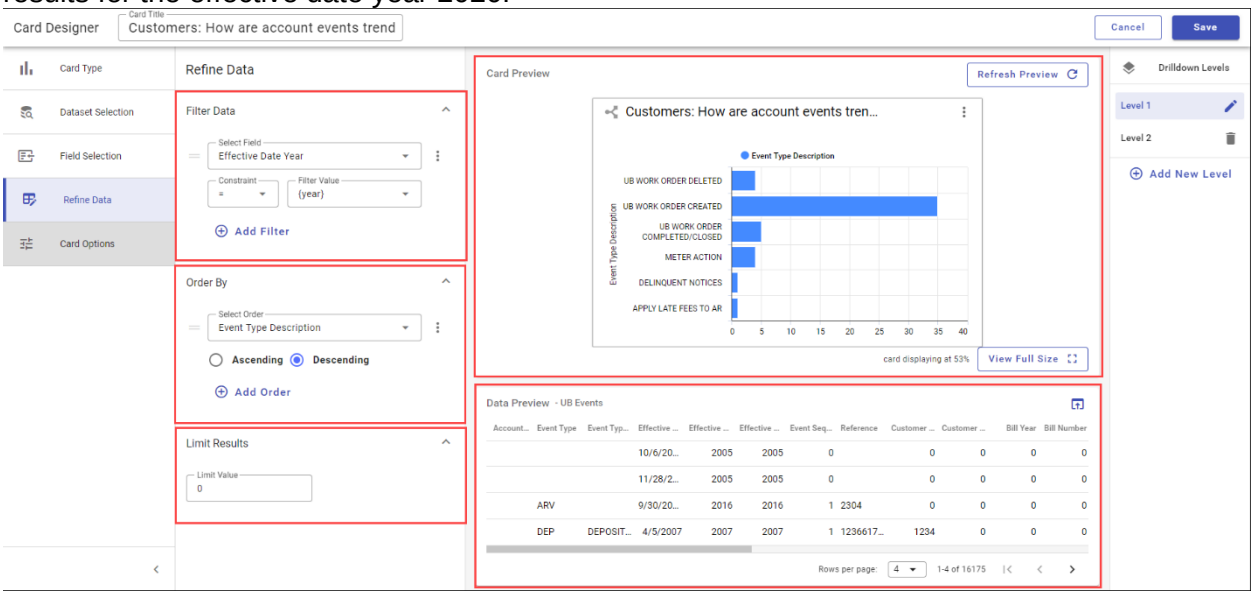

3. Select the drilldown card type  to create as the next level card
4. Specify the field that the connection is linking to.
5. Click Save.
6. Update the new level card, adding or refining fields, and then save the changes.

**Note:** The default dataset for the new level of a drilldown is the same dataset as level one. You can change this by navigating to the Select Dataset step in Card Designer.

The Drilldown Levels group shows the number of data levels and highlights the selected level. Click the Delete button for a specific level to remove it.

# Refine Data

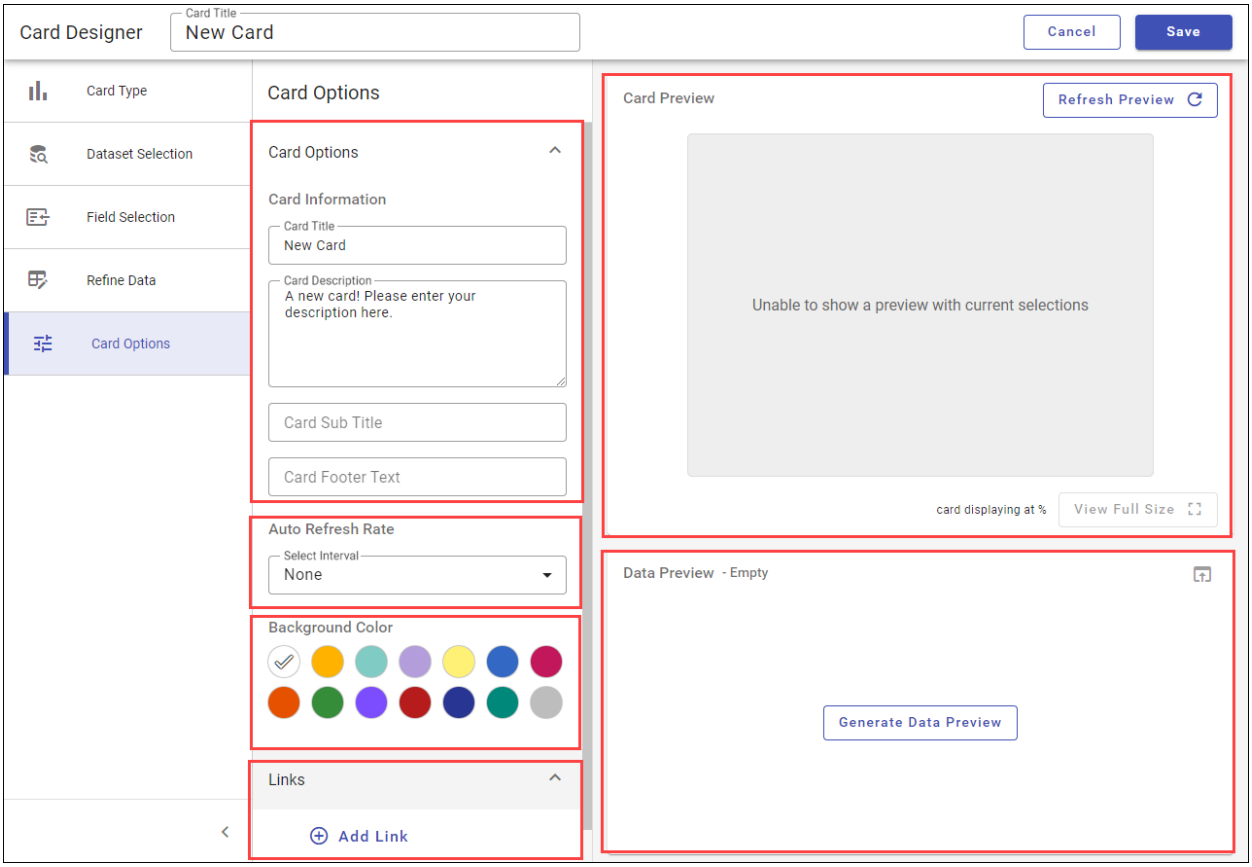
Refine Data is an optional step that provides ways to filter the data by one or more fields, order the data, or limit the results returned. When you enter a field, constraint, and value to the filter data section, it limits the records that the card includes. For example, if you select Effective Date Year, select the equals to constraint, and then select 2020 as the year, the card provides only results for the effective date year 2020.




- The Order By selection defines a field for which to sort the data either ascending or descending.
- The Limit Results box causes the card to show only the defined number of results.
- The Card Preview group shows the card preview update as refinements are made to the data, and the Data Preview group provides able to review the values in each field for more effective data field selections.

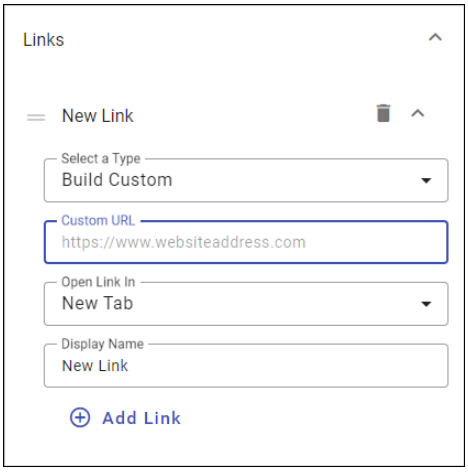
# Card Options

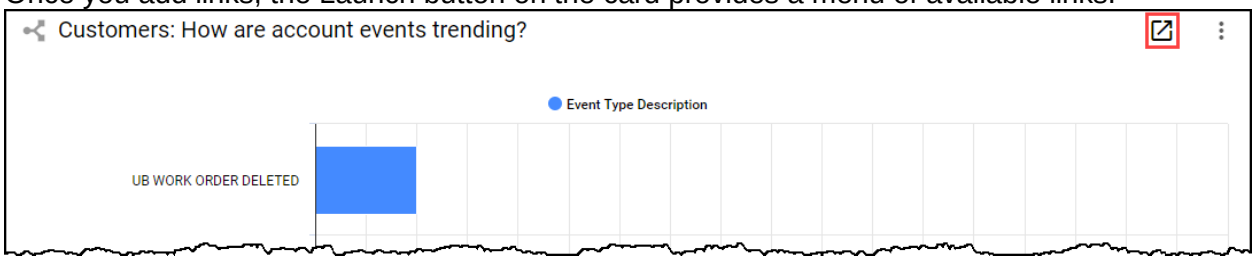
Card Options stores card title and description information, defines an autorefresh level, assigns background colors, and allows you to add links if applicable.




- The Auto Refresh Rate field determines the intervals at which the card queries the source application to update the data. A minimum refresh rate can be set within the Administration section that overrides your organization's refresh minimum.
- The Background Color option applies a color to the card banner.
- The Links group provides the option of adding one or more quick links to the card. When you click Add Link, the page provides the New Link option. Click the expand arrow to display the required setup fields. You can link to a Hub page, Tyler menu, or customized

location.




Once you add links, the Launch button on the card provides a menu of available links.