

# 1 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

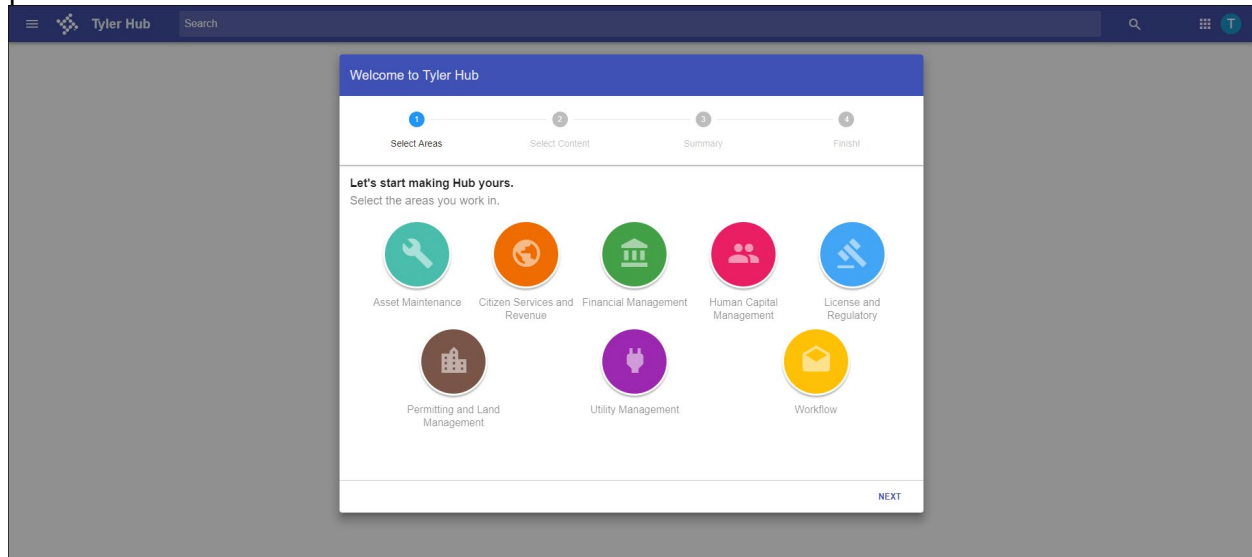
The screenshot displays the Tyler Hub interface. At the top, there is a navigation bar with a 'Home' button and a search bar. Below this, a 'Tylertown - Live' header is visible. The main dashboard area features three large cards: 'Alerts' (0), 'Notifications' (8), and 'Approvals' (6). Below these cards is a table titled 'Invoices: What needs to be paid?'. The table has columns for Invoice Number, Invoice Date, Vendor Name, Status, Description, and Invoice Total. The table lists several invoices, including one from 'One Time Vendor' and others from 'ABC SUPPLY COMPANY', 'DEF SUPPLY COMPANY', 'MILIKEN', 'FORD MOTOR COMPANY', and 'JOHN DEERE'. To the right of the table, there is a 'Content Pages' section with links to 'Asset Maintenance', 'Citizen Services and Revenue', 'Financial Management', and 'Human Capital Management'. Below this, a 'Favorites' section lists 'Financials', 'Accounting Entries', 'General Journal Entry/Proof', 'Purchase Order Entry', and 'Requisitions'. At the bottom, there is a 'Recent Activity' section.

Invoice Number	Invoice Date	Vendor Name	Status	Description	Invoice Total
100MHS	9/13/2016	One Time Vendor	Approved		\$5.00
5870	8/4/2009	ABC SUPPLY COMPANY	On Hold		\$85,000.00
5866	7/27/2009	DEF SUPPLY COMPANY	Approved		\$100.00
5867	7/27/2009	DEF SUPPLY COMPANY	Approved		\$1,000.00
5868	7/27/2009	DEF SUPPLY COMPANY	Approved		\$1,200.00
5869	7/27/2009	DEF SUPPLY COMPANY	Pending Approval		\$1,500.00
5904	7/24/2013	MILIKEN	Approved	ITEMS	\$50.00
5911	7/24/2013	FORD MOTOR COMPANY	Approved	CAR IMPROVEMENT	\$1,000.00
5907	7/24/2013	JOHN DEERE	Rejected	JOHN DEERE	\$30.00
5560	7/10/2007	DEF SUPPLY COMPANY	Approved	f	\$987.00

**Note:** The examples provided in this document are based on using Tyler Hub with Munis, but the functionality is the same when you are using the Hub with your Tyler product.

## 2 ONBOARDING

When you access Tyler Hub for the first time, or after clicking the Start Fresh option in the Edit Pages dialog box, the program provides step-by-step instructions to complete the onboarding process.

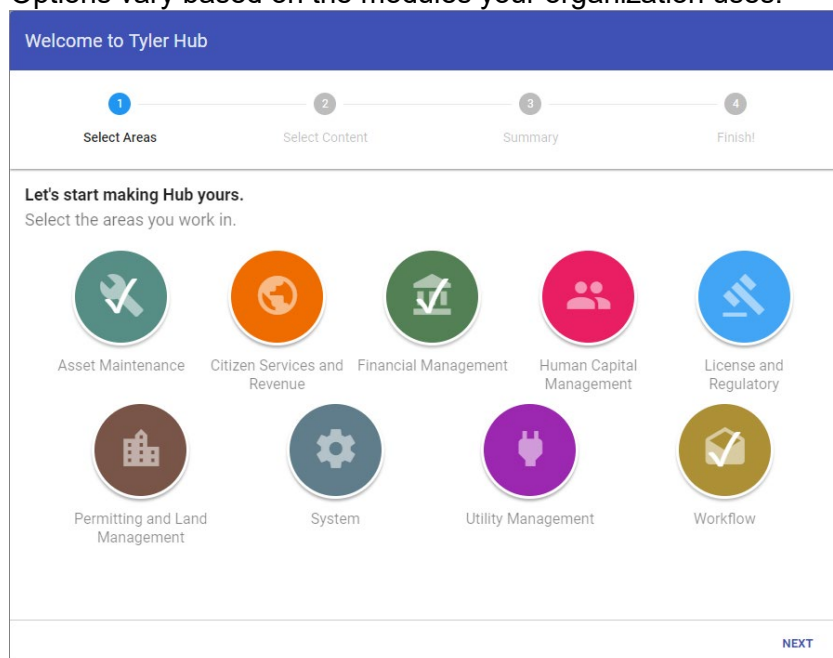


Administrators have the ability to disable the onboarding process; depending on your organizational requirements, the onboarding process may not display in your environment.

To complete the onboarding process:

1. Click the icons to choose the areas in which you work; a checkmark displays 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.

Welcome to Tyler Hub

Progress: 1. Select Areas (checked), 2. Select Content (active), 3. Summary, 4. Finish!

Tab: PAGES (selected), BUNDLES, RECOMMENDED

Bundle Name	Description	Select Page
Budget Monitoring	Budget Monitoring page shows the current budgets, fund breakdown, and spending and budgeting trends.	<input type="checkbox"/>
Inventory	Inventory analysis page contains count cards of items pending receipt, items below stock and stale stock. Additional analysis is available o ...	<input type="checkbox"/>
Invoice Monitoring	Monitor current invoices, what is due, overdue, pending, and discounted. What needs to be paid and further filter an ...	<input type="checkbox"/>
Invoice Processing	Invoice processing page contains open batches, batch reviews and productivity of active invoices. Further analyze work by individual clerks ...	<input type="checkbox"/>
Invoice Trending	Trending analysis of invoices over time, payment trends by due date, discount date of after due date. Vendor analysis available on Payment T ...	<input type="checkbox"/>
Purchasing Activities	Displays information related to purchasing tasks and data. Includes a recent requisitions data table, recent purchase orders bar chart, and ...	<input type="checkbox"/>

Buttons: BACK, NEXT

**Note:** If you are migrating from the Tyler Dashboard, the Recommended tab displays. 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. 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.

Welcome to Tyler Hub

✓

Select Areas

✓

Select Content

3

Summary

4

Finish!

**Here's the content you selected.**

Please choose a page as your Home Page.

🏠

Budget Monitoring

☒

Budget Monitoring page shows the current budgets, fund breakdown, and spending and budgeting trends.

Inventory

☐

Inventory analysis page contains count cards of items pending receipt, items below stock and stale stock. Additional analysis is available on inventory usage, p...

Invoice Monitoring

☐

Monitor current invoices, what is due, overdue, pending, and discounted. What needs to be paid and further filter by department and clerk and analyze payment tr...

Invoice Trending

☐

Trending analysis of invoices over time, payment trends by due date, discount date of after due date. Vendor analysis available on Payment Trends: What vendors ...

Purchasing Activities

☐

Displays information related to purchasing tasks and data. Includes a recent requisitions data table, recent purchase orders bar chart, and purchasing user link

BACK

NEXT

5. Click Next to advance to the final screen.

Welcome to Tyler Hub

✓

Select Areas

✓

Select Content

✓

Summary

4

Finish!

👍

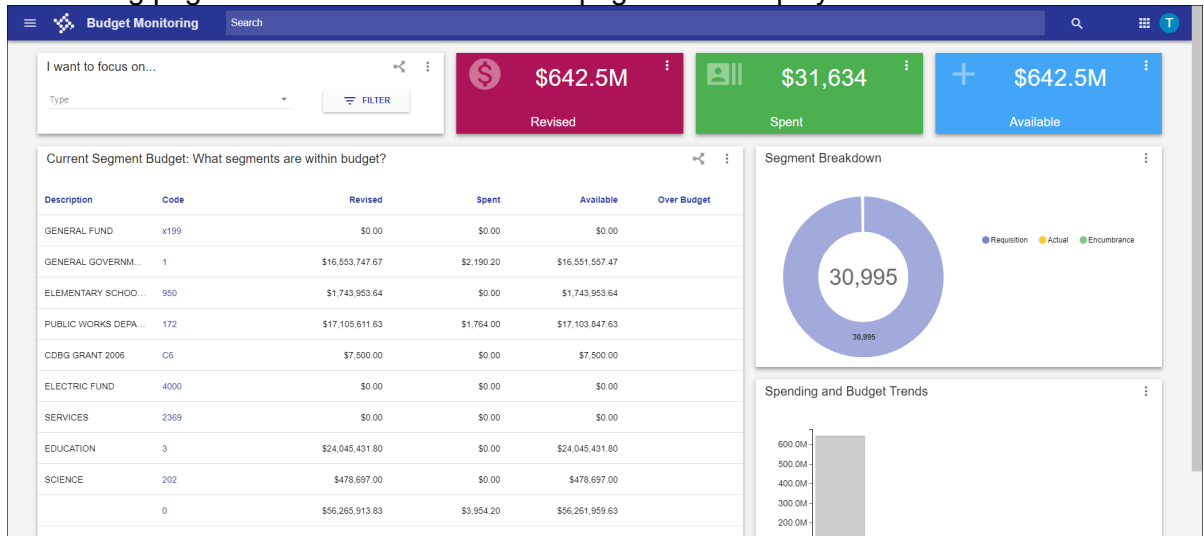
Nice Work

Let's see your new home page!

BACK

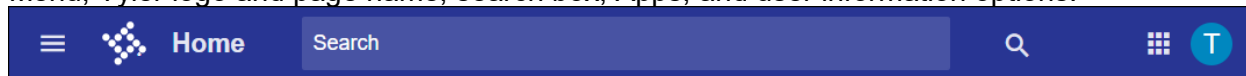
DONE

6. Click Done to complete the onboarding process.  
The program generates the Home page and displays it. In this case, the Budget Monitoring page was selected as the Home page and is displayed.



### 3 OMNIBAR

The omnibar displays across the top of the screen. It displays on every page and features the Menu, Tyler logo and page name, search box, Apps, and user information options.

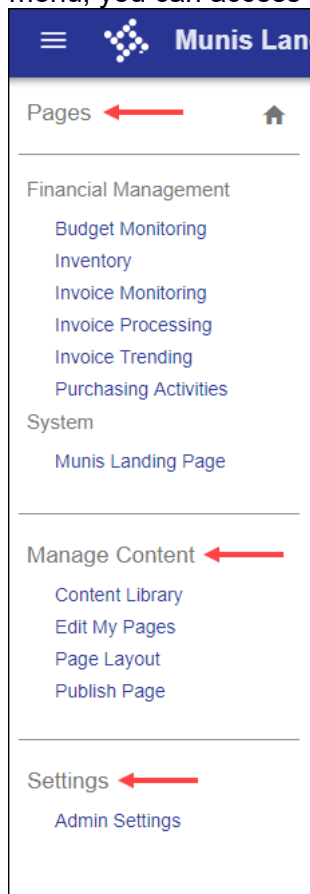


#### 3.1 MENU

The Menu button is available in the upper-left corner of the omnibar.



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



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

### 3.2 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.

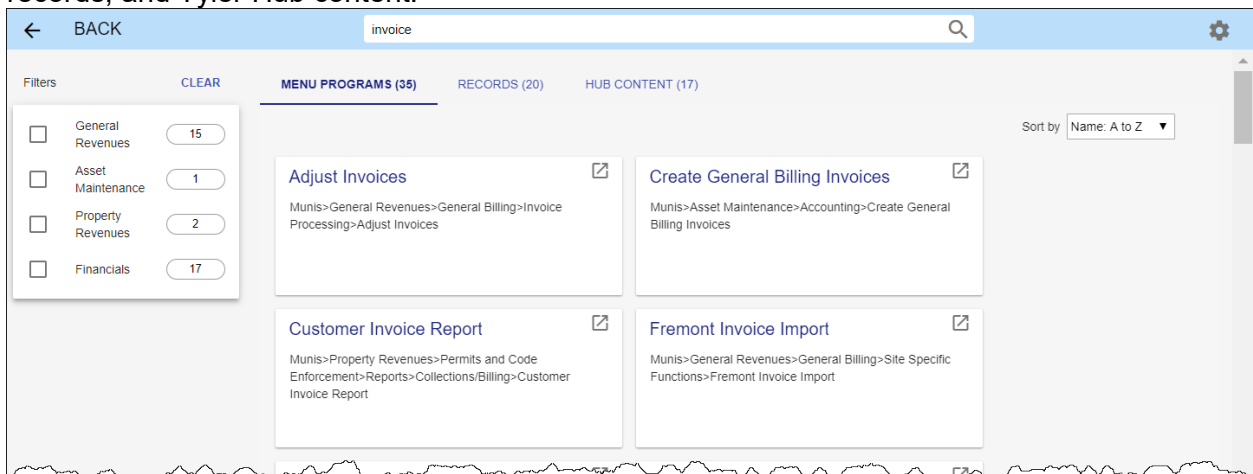


### 3.3 SEARCH BOX

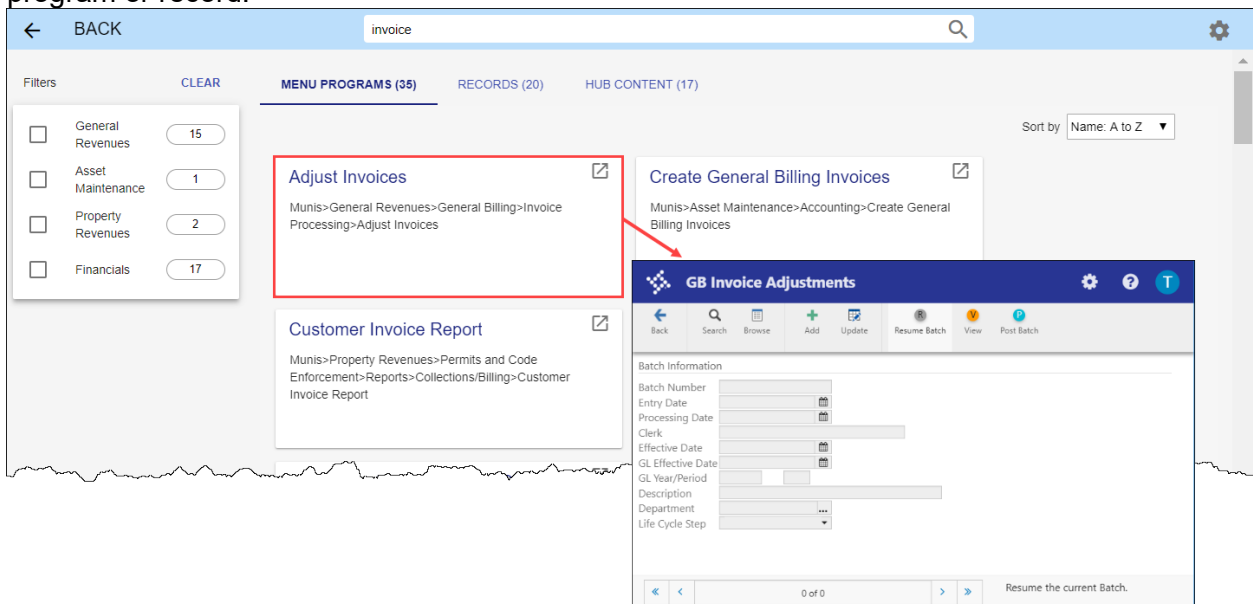
The search box allows you to enter criteria and search Tyler Hub for relevant information.



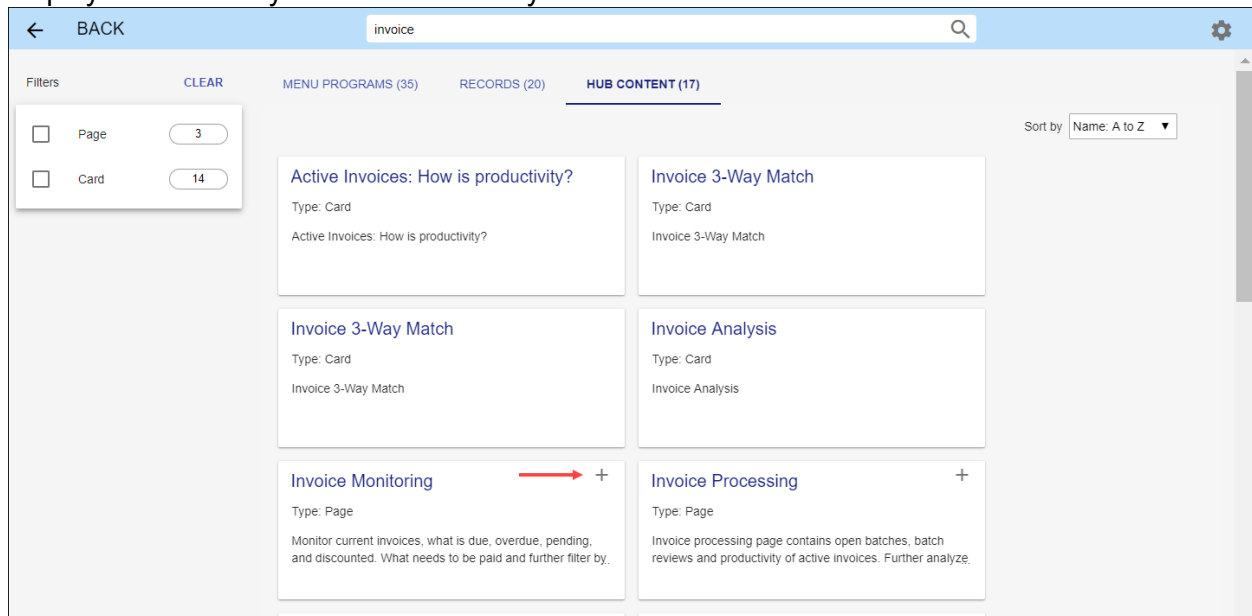
When you enter search criteria, the program displays applicable results from menu programs, records, and Tyler Hub content.



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



For results that display in the Hub Content tab, click the Add button to add that item. The button displays on content you have not already added.



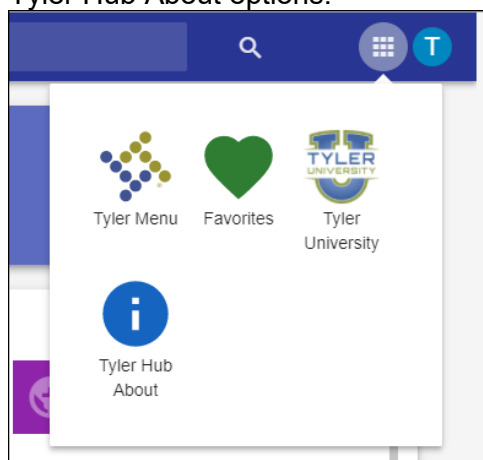
Refer to the [Pages](#) and [Cards](#) sections for more information on those topics.

### 3.4 APPS

The Apps button is available in the omnibar.



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



**Note:** Additional options may also display, depending on your configuration settings.



### 3.4.1 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.

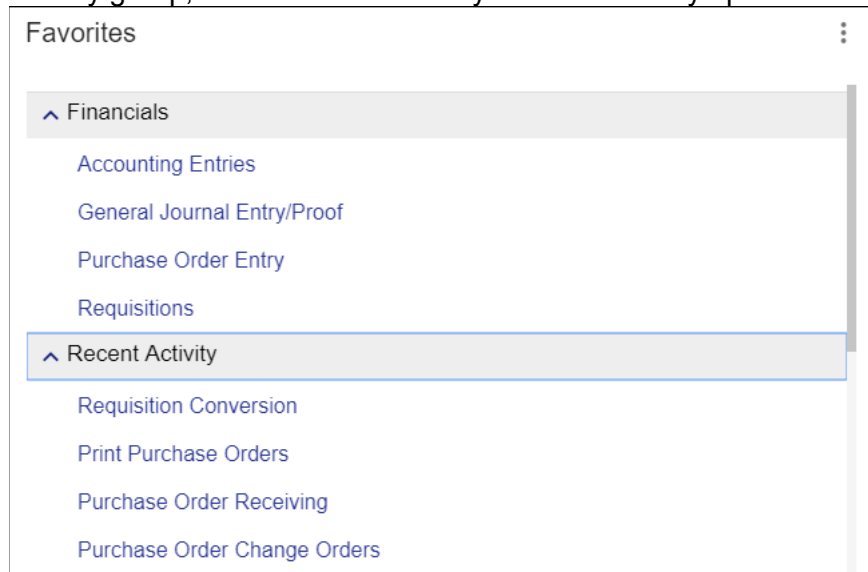
The screenshot shows the 'Tyler Menu' window. At the top is a blue header with the text 'Tyler Menu'. Below the header is a search bar with the placeholder text 'Search' and a magnifying glass icon. Under the search bar, there is a list of categories under the heading 'Munis'. The categories are: Financials, Human Capital Management, General Revenues, Property Revenues, Asset Maintenance, Other Applications, Departmental Functions, System Administration, and Help. At the bottom of the window, there are two buttons: 'REFRESH' and 'CLOSE'.

When you enter search criteria, appropriate programs display; select an option to open that program in Munis.

This screenshot shows the 'Tyler Menu' window with the search criteria 'journal entry' entered in the search bar. The search results are displayed under the heading 'Search (journal entry)'. The results include: Capital Asset General Journal Entry, Encumbrance Journal Entry/Proof, General Journal Entry/Proof (2), NSFY Prior Year General Journal Entry, Project Journal Entry/Proof, and Recurring Journal Entry/Generate. A red box highlights 'General Journal Entry/Proof (2)'. A red arrow points from this box to the 'General Journal Entry/Proof' window. The 'General Journal Entry/Proof' window is shown in the foreground, displaying various fields for journal entry information, including 'Effective date', 'Fiscal year', 'Period', 'Journal', 'Source journal', 'Entity code', 'Auto reverse journal', 'Short description', 'Journal reference', 'Journal type', 'Budget year code', 'Due to/Due from fund', 'Reference 2', 'Reference 3', 'Approval status', 'WO #', 'Task #', 'Vendor', 'Transaction type', and 'Project Accounts apply'. The window also has a 'Journal Lines' section with columns for 'Line', 'Project String', 'Project Description', 'Account', and 'Account Description'. At the bottom, there is a 'Journal Totals' section with 'Debits' and 'Credits' fields, and a 'Workflow' section with buttons for 'My Approvals', 'Approve', 'Reject', 'Forward', 'Hold', and 'Approvers'.

### 3.4.2 Favorites

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



#### 3.4.2.1 Adding a Category

Categories are used to 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.  
The Favorites menu displays.
3. Click Edit.  
The Edit Favorites menu displays.
4. Click Add Category.  
The Add Category dialog box displays.
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.

#### 3.4.2.2 Adding a Favorite

Different types of favorites can be added to the Favorites menu. Favorite programs can be added directly from the Tyler Menu, and favorite websites can be manually added.

To add a favorite program from the Tyler Menu:

1. Click the Apps button.
2. Click Tyler Menu.
3. Type the program name into the search box or navigate to the 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.  
The Favorites menu displays.
3. Click Edit.  
The Edit Favorites menu displays.
4. Click the Add button beside the category to which the favorite should be added.  
The Add Favorite dialog box displays.
5. Enter the name of the website in the Name field. This is the name that will display 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.

### 3.4.2.3 Editing a Favorite or Category

To edit a favorite or category:

1. Click the Apps button.
2. Click Favorites.  
The Favorites menu displays.
3. Click Edit.  
The Edit Favorites menu displays.
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.

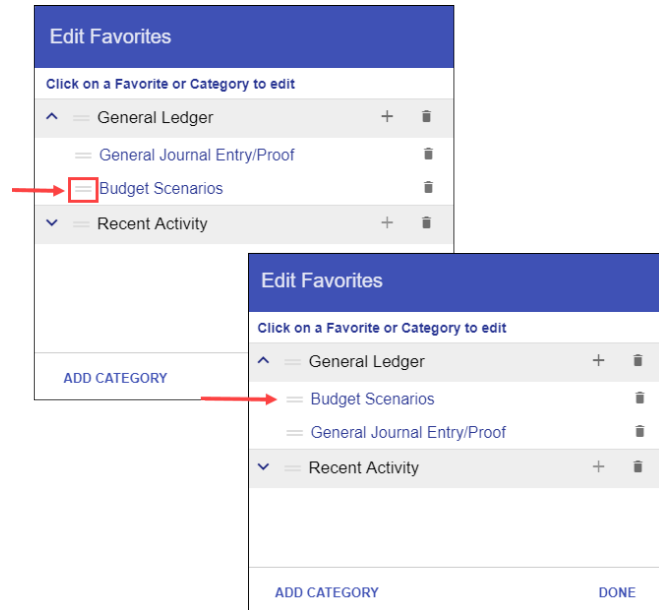
### 3.4.2.4 Deleting a Favorite or Category

To delete a favorite or category:

1. Click the Apps button.
2. Click Favorites.  
The Favorites menu displays.
3. Click Edit.  
The Edit Favorites menu displays.
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.
8. Click Close to exit the Favorites menu.

### 3.4.2.5 Reordering Favorites or Categories

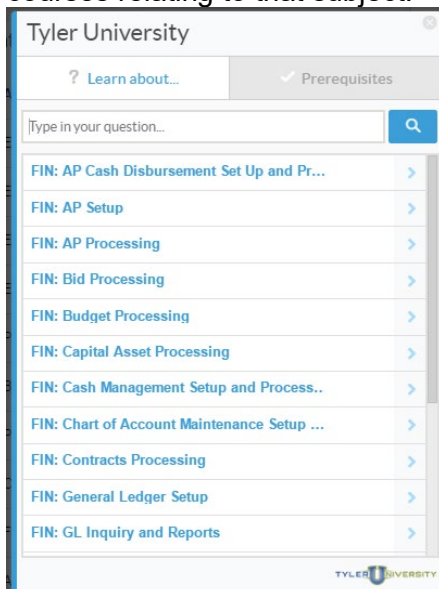
To change the order of favorites and categories, click the Move button and drag the item to a new location.



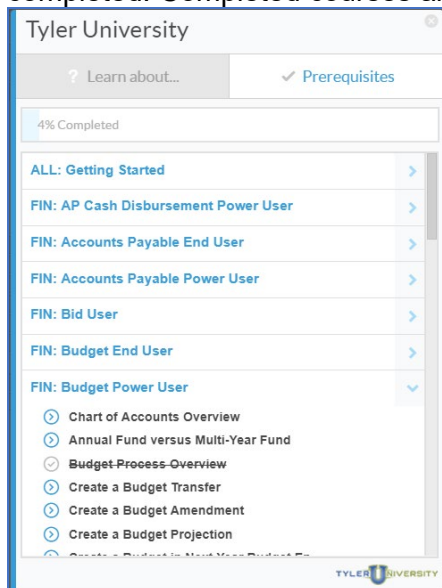
### 3.4.3 Tyler University

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.

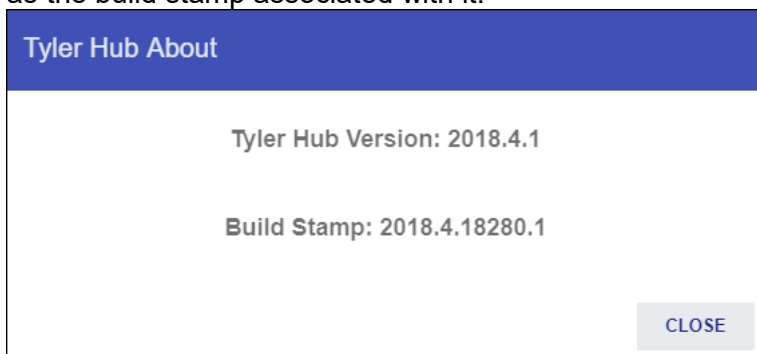


To take a course in Tyler University:

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.

### 3.4.4 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.



The User Info button is available in the upper-right corner 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.

