



# SharePoint Project Management Tools

Using Share Point for Tyler Project Implementation

*Using Share Point for Tyler Project Implementation*

**W**elcome to Tyler Implementation! Over the years, Tyler has continuously revisited and refined its Implementation processes in order to benefit from years of project experience and invaluable customer feedback. Overwhelmingly, the most repeated message we received was that in complex, multi-organizational projects the need for centralized control of information is critical to project success. Scheduling, communication of tasks and their status, important project documents, contact information all require “real time” accessibility on a broad scale. Reducing or eliminating redundancy in preparing and distributing schedules, agendas, homework assignments, etc. significantly simplifies some of the key information management challenges a Project Team faces. Project Documents are protected, yet accessible and full versioning allows for collaboration across teams.

As a result, Tyler has invested in the development of a SharePoint Project Management dashboard and formulated a structure that identifies the central communication needs and makes them easy to manage. Through the use of unique Client logins and permissions, your information is protected and visible only to those you identify in your organization and Tyler Project Staff. Although security is in place, Tyler never recommends posting sensitive materials to the Tyler Project SharePoint site.

The following pages will provide you with detailed instructions as to the use of Microsoft SharePoint in Project Management. We hope you will find this a helpful and useful tool as we work together to communicate and manage your Tyler Project effectively.

## 1. Contents

- 1. Logging In to Client SharePoint for the First Time ..... 9
  - 1.1. Email Instructions to Client User..... 9
  - 1.2. PDF Instructions ..... 9
- 2. Logins for the Client Project Team..... 12
  - 2.1. Establishing Logins – ..... 12
  - 2.2. Other Project Team Logins..... 12
    - 2.2.1. Required Information for Project Team List ..... 14
- 3. General Notes ..... 16
  - 3.1. Backup Process for your Share Point Site ..... 16
    - 3.1.1. Manual Backup..... 16
    - 3.1.2. Tyler Automated Backup..... 16
    - 3.1.3. Extended Backup Service ..... 16
  - 3.2. The Difference Between Tasks and Homework..... 16
    - 3.2.1. Tasks..... 16
    - 3.2.2. Homework..... 16
  - 3.3. Keeping the Information Current..... 17
- 4. Navigating on Your Home Page ..... 18
  - 4.1. Left Navigation List..... 20
  - 4.2. Central Viewing Pane ..... 23
    - 4.2.1. Project Announcements..... 23
- 5. Alerts ..... 24
  - 5.1. Creating Your Alert..... 24
  - 5.2. Managing Existing (My) Alerts ..... 27
- 6. Workflow..... 29
  - 6.1. Workflow Steps..... 29
  - 6.2. Workflow Approval Process..... 30
    - 6.2.1. Client Acceptance: Views ..... 31
    - 6.2.2. Rejected Item..... 31
    - 6.2.3. Schedule Approval Needed..... 32
    - 6.2.4. Master Project Plan Calendar ..... 33

---

|         |  |    |
|---------|--|----|
| 6.3.    | Right Viewing Pane .....                     | 34 |
| 6.3.1.  | For More Information .....                   | 34 |
| 6.3.2.  | Master Overdue Project Tasks .....           | 34 |
| 6.3.3.  | Master Overdue Homework .....                | 36 |
| 6.3.4.  | Master Active Project Issues & Actions ..... | 37 |
| 6.4.    | Sub-Project Tabs .....                       | 39 |
| 7.      | Navigating on the Sub-Project Pages .....    | 39 |
| 7.1.    | Financial Sub-Project Home Page .....        | 39 |
| 7.1.1.  | Financial Left Navigation List .....         | 40 |
| 7.1.2.  | Financial Central Viewing Pane .....         | 40 |
| 7.1.3.  | Financial Project Announcements .....        | 40 |
| 7.1.4.  | Financial Project Plan .....                 | 41 |
| 7.1.5.  | Financial Project Plan Calendar .....        | 41 |
| 7.1.6.  | Financial Right Viewing Pane .....           | 42 |
| 7.1.7.  | Financial For Your Info.....                 | 42 |
| 7.1.8.  | Financial Overdue Tasks.....                 | 42 |
| 7.1.9.  | Master Overdue Homework .....                | 44 |
| 7.1.10. | Financial Issues & Actions .....             | 45 |
| 8.      | Basic Guide to Field Definitions .....       | 47 |
| 8.1.    | Master Project Plan Detail View .....        | 47 |
| 8.1.1.  | Phase .....                                  | 48 |
| 8.1.2.  | WBS .....                                    | 48 |
| 8.1.3.  | Sub Category .....                           | 49 |
| 8.1.4.  | ID# .....                                    | 49 |
| 8.1.5.  | %.....                                       | 49 |
| 8.1.6.  | Task Name.....                               | 49 |
| 8.1.7.  | Start Date + Time .....                      | 49 |
| 8.1.8.  | End Date + Time .....                        | 49 |
| 8.1.9.  | Bill Days .....                              | 50 |
| 8.1.10. | Day Type.....                                | 50 |
| 8.1.11. | Required Attendees .....                     | 51 |

---

|           |   |    |
|-----------|---|----|
| 8.1.12.   | Assigned to.....  | 51 |
| 8.1.13.   | Location.....   | 51 |
| 8.1.14.   | Room/Address .....  | 51 |
| 8.1.15.   | Confirmed .....   | 51 |
| 8.1.16.   | Filter .....  | 52 |
| 8.1.17.   | Display.....  | 52 |
| 8.1.18.   | Module.....   | 53 |
| 8.1.18.1. | MUNIS .....   | 53 |
| 8.1.18.2. | Tyler SIS* .....  | 54 |
| 8.1.18.3. | PENSION* .....  | 54 |
| 8.1.19.   | Notes .....   | 54 |
| 8.1.20.   | Workspace .....   | 54 |
| 8.1.21.   | All Day Event .....   | 55 |
| 9.        | View Options for Information Management .....                       | 55 |
| 9.1.      | Master Project Views .....  | 55 |
| 9.1.1.    | Master PP Calendar.....   | 55 |
| 9.1.2.    | Master Calendar List .....  | 56 |
| 9.1.3.    | Master Project Plan.....  | 56 |
| 9.1.4.    | Master Homework .....   | 56 |
| 9.1.5.    | Master PP Gantt.....  | 56 |
| 9.1.6.    | Master Overdue Homework .....                                       | 56 |
| 9.1.7.    | Master Active Tasks .....   | 56 |
| 9.1.8.    | Master Completed Tasks.....   | 56 |
| 9.1.9.    | Homework All.....   | 56 |
| 9.1.10.   | Homework Overdue.....   | 56 |
| 9.1.11.   | Phase I, Phase II, Phase III, Phase BLOCKED, Phase Proj Mgt – ..... | 56 |
| 9.1.12.   | Confirmed Schedule.....   | 57 |
| 9.1.13.   | Count Phase I, Count Phase II, Count Phase III...- .....            | 57 |
| 9.1.14.   | Schedule Approval .....   | 57 |
| 9.1.15.   | Schedule Review .....   | 57 |
| 9.1.16.   | Weekly Status.....  | 57 |

---

|         |  |    |
|---------|--|----|
| 9.1.17. | Current Status Review.....                   | 57 |
| 9.2.    | Module Tab Views.....                        | 59 |
| 9.2.1.  | Financial PP Calendar.....                   | 59 |
| 9.2.2.  | Financial PP Gantt.....                      | 59 |
| 9.2.3.  | Financial Project Plan.....                  | 59 |
| 9.2.4.  | Financial Overdue Tasks List.....            | 59 |
| 9.2.5.  | Financial Active Tasks List.....             | 59 |
| 9.2.6.  | Financial Completed Tasks List.....          | 59 |
| 9.2.7.  | Financial Homework.....                      | 59 |
| 9.2.8.  | Financial Homework Overdue.....              | 59 |
| 9.2.9.  | Schedule Review for Approval Edit Mode.....  | 60 |
| 9.2.10. | Rejected Schedule.....                       | 60 |
| 9.2.11. | Current Status Review.....                   | 60 |
| 9.2.12. | Using the Sub Category column.....           | 60 |
| 9.3.    | Revenue Specific Tab Views.....              | 61 |
| 9.3.1.  | Tax PP Calendar.....                         | 61 |
| 9.3.2.  | Tax Project Plan.....                        | 61 |
| 9.3.3.  | Utility Billing PP Calendar.....             | 61 |
| 9.3.4.  | Utility Billing Project Plan.....            | 61 |
| 9.3.5.  | Business Licenses PP Calendar.....           | 61 |
| 9.3.6.  | Business Licenses Project Plan.....          | 61 |
| 9.3.7.  | Permits E Codes PP Calendar.....             | 62 |
| 9.3.8.  | Permits E Codes Project Plan.....            | 62 |
| 9.3.9.  | Animal Licenses PP Calendar.....             | 62 |
| 9.3.10. | Animal Licenses Project Plan.....            | 62 |
| 9.3.11. | Boat Excise PP Calendar.....                 | 62 |
| 9.3.12. | Boat Excise Project Plan.....                | 62 |
| 9.3.13. | REV-General Billing PP Calendar.....         | 62 |
| 9.3.14. | REV-General Billing Project Plan.....        | 62 |
| 9.3.15. | Maine Vehicle Registration PP Calendar.....  | 62 |
| 9.3.16. | Maine Vehicle Registration Project Plan..... | 63 |

---

|         |   |    |
|---------|---|----|
| 9.3.17. | Motor Vehicle Excise PP Calendar .....  | 63 |
| 9.3.18. | Motor Vehicle Excise Project Plan .....   | 63 |
| 9.3.19. | Park Tickets PP Calendar .....  | 63 |
| 9.3.20. | Park Tickets Project Plan .....   | 63 |
| 9.3.21. | Slip Reservations PP Calendar .....   | 63 |
| 9.3.22. | Slip Reservations Project Plan .....  | 63 |
| 9.3.23. | Tyler Cashiering PP Calendar .....  | 63 |
| 9.3.24. | Tyler Cashiering Project Plan .....   | 63 |
| 9.3.25. | Vehicle Stickers PP Calendar .....  | 64 |
| 9.3.26. | Vehicle Stickers Project Plan .....   | 64 |
| 9.3.27. | Virginia State Income Tax PP Calendar .....                                     | 64 |
| 9.3.28. | Virginia State Income Tax Project Plan .....                                    | 64 |
| 9.4.    | Master Issues & Actions Views .....   | 64 |
| 9.4.1.  | Master Issues & Actions .....   | 64 |
| 9.4.2.  | Master Active Issues & Actions .....  | 64 |
| 9.4.3.  | Master Overdue Issues & Actions .....   | 64 |
| 9.4.4.  | Financial/Revenue/Payroll/CLT Issues & Actions .....                            | 65 |
| 9.4.5.  | Financial/Revenue/Payroll/CLT Active Issues & Actions .....                     | 65 |
| 9.4.6.  | Financial/Revenue/Payroll/CLT Overdue Issues & Actions .....                    | 65 |
| 10.     | Checklist for Daily Share Point Project Management .....                        | 65 |
| 10.1.   | Check and Process “Pending Client Acceptance” Requests .....                    | 65 |
| 10.2.   | Check and Process “Schedule for Approval Needed” Requests .....                 | 65 |
| 10.3.   | Review Calendars .....  | 65 |
| 10.4.   | Follow Up on Overdue Homework .....   | 66 |
| 10.5.   | Follow Up on Overdue Tasks .....  | 66 |
| 10.6.   | Follow Up on Issues & Action Items .....  | 66 |
| 10.7.   | Review Site Reports .....   | 67 |
| 10.8.   | Review Active Tasks and Active Homework on Sub-Project Pages .....              | 68 |
| 10.9.   | Update % Field to Indicate Progress on Tasks Assigned to Client Resources ..... | 68 |



## 1. Logging In to Client SharePoint for the First Time

### 1.1. Email Instructions to Client User

\* The Email Instructions and the PDF is sent to each Client SharePoint User once their profile is activated.

Hello!

You have gained access **Client Name Here** SharePoint Site.

#### TO LOGIN

Open a new Internet Browser and type <https://tylertech.com/tylerclient>, and then type your Login ID in the Username box and your Password in the Password box.

Your Login ID and Password will be required after you have logged to Tyler Client SharePoint Site in 2 occasions:

1. Idle Time Out Period - 30 minutes
2. Working Session Duration Ended – 4 hours

*Please find detailed instructions attached for your convenience. You must complete Page#1 of the instructions to avoid access issues while navigating thru the site and its content.*

*Tyler recommends the use of Microsoft Explorer IE 7 or greater in order to use full SharePoint functionality.*

#### TO SIGN OUT



Click on the  of your internet browser and click Yes to the prompts to confirm your log out.

#### IF YOU FORGET YOUR PASSWORD

Please email the SharePoint Administrator at [tyler.clientadminsp@tylertech.com](mailto:tyler.clientadminsp@tylertech.com) providing the follow information below. Please Cc on your email the Tyler Project Manager and your Project Manager.

*Please assure to follow this email request for prompt response. An email response will be provided in period of 24 hours or less.*

**Client Name:**

**Tyler Project Manager Name:**

**Your Login ID:**

Please make sure to keep your login ID and Password to your use only.

Username: **XXXXXX**

Password: **12345678**

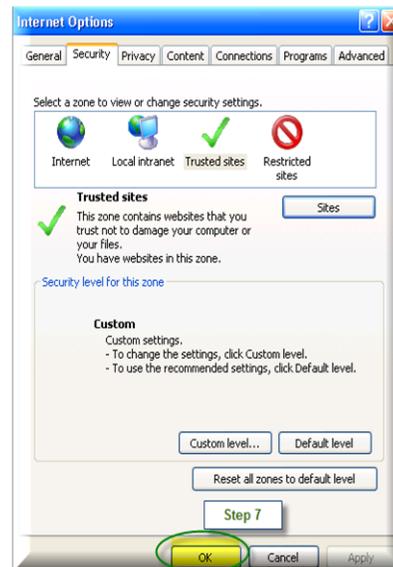
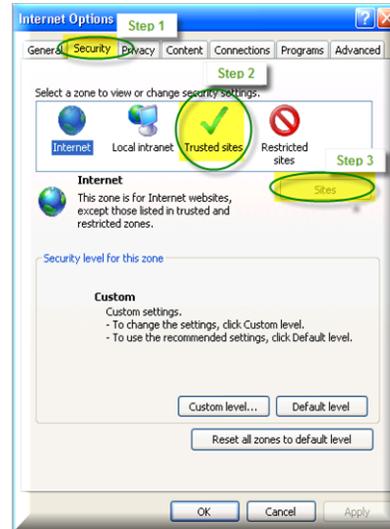
Permission:  **Read/Contribute**

## 1.2. PDF Instructions

Additional Internet setting is required. The client IT should be able to push these settings to for the end users.

Tyler Client SharePoint LOGGING IN FOR CLIENTS

**1** FIRST TIME LOGIN INTERNET SETTINGS  
 OPEN: Internet Explorer  
 GO Internet> Tools>Internet Options> Security Tab> Trusted Sites and enter the URL <https://tylergateway.tylertech.com> > Select Add> Close and click OK to apply the changes. Please see screens shots for assistance.



c

- Open Internet Explorer - *Tyler recommends the use of Microsoft Explorer IE 7 or greater in order to use full SharePoint functionality.*

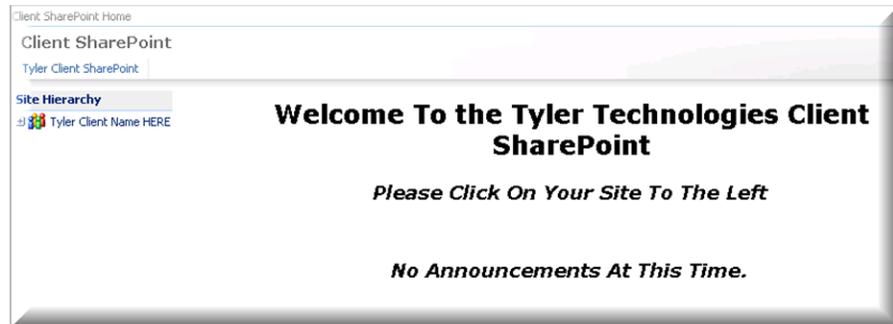
Tyler Client SharePoint  
LOGGING IN FOR CLIENTS

**1** GO TO: <https://tylergateway.tylertech.com/tylerclient>.  
For any security prompt that may pop up please click OK.

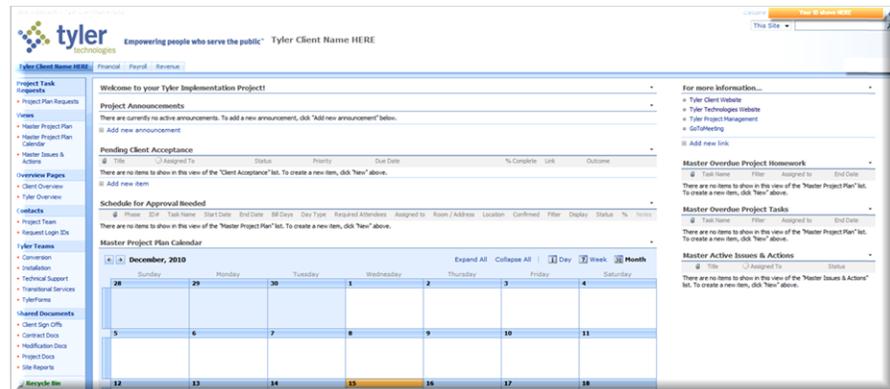
Enter the Login ID (no capital sensitive) and Password \_\_\_\_\_



**2** CLICK ON:  
The name of your site that will appear below the Client SharePoint tab.



**3** WELCOME TO TYLER CLIENT SHAREPOINT!



## 2. Logins for the Client Project Team

### 2.1. Establishing Logins –

The Tyler Project Manager will submit a request for the Client Project Manager to access the site thru the Request Login IDs link on the quick launch (an Alert is sent to Client SharePoint Administrator) or email [tyler.clientadmin@tylertech.com](mailto:tyler.clientadmin@tylertech.com) .

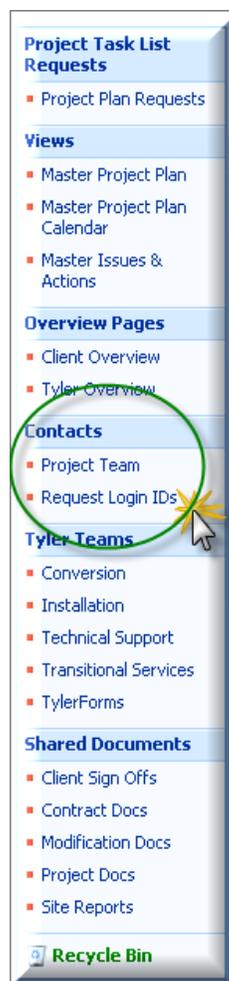
**Logins Permissions** - Client Project Manager/Users (Read/Write Capabilities)

User Name =

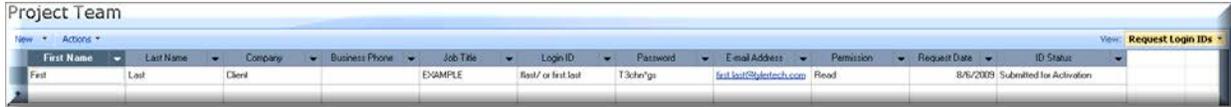
Password = For security purposes the password must have a minimum of 8 characters, beginning with a capital letter, one numeric symbol and one symbol character from the top numeric keys.

### 2.2. Other Project Team Logins

- Once logged in, the Client Project Manager will click on Request Login IDs list to enter the information for new users to access their client SharePoint site. An Alert will be sent to the Client SharePoint Administrator and the new Login IDs will be activated.



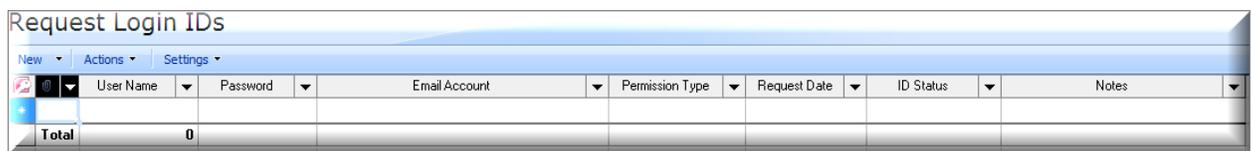
**On Client SharePoint Sites created prior to 03/10/2011** the link Request Login IDs takes you to a slightly modified view of the Project Team list. As the request for the login ID User is entered, the information is also populating the Project Team contact information. This table view is intended to provide the Client with a datasheet that makes bulk data entry less time consuming.



| First Name | Last Name | Company | Business Phone | Job Title | Login ID       | Password | Email Address                | Permission | Request Date | ID Status                |
|------------|-----------|---------|----------------|-----------|----------------|----------|------------------------------|------------|--------------|--------------------------|
| First      | Last      | Client  |                | EXAMPLE   | first.lastname | 13char@p | first.lastname@tylertech.com | Read       | 8/6/2009     | Submitted for Activation |

**On Client SharePoint Sites created later than 03/10/2011** the link takes you to separated list from the Project Team List with limited access to only authorized user(s) by the client.

The Request Login IDs link will take you to quick entry view in Edit in Data Sheet mode.



| User Name      | Password | Email Account | Permission Type | Request Date | ID Status | Notes |
|----------------|----------|---------------|-----------------|--------------|-----------|-------|
| <b>Total</b> 0 |          |               |                 |              |           |       |

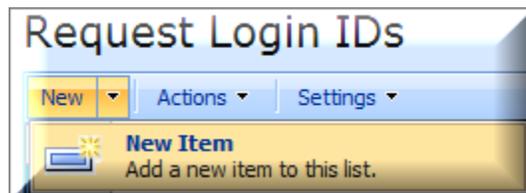
The Request Login IDs list collects only the necessary information for user profile activation.

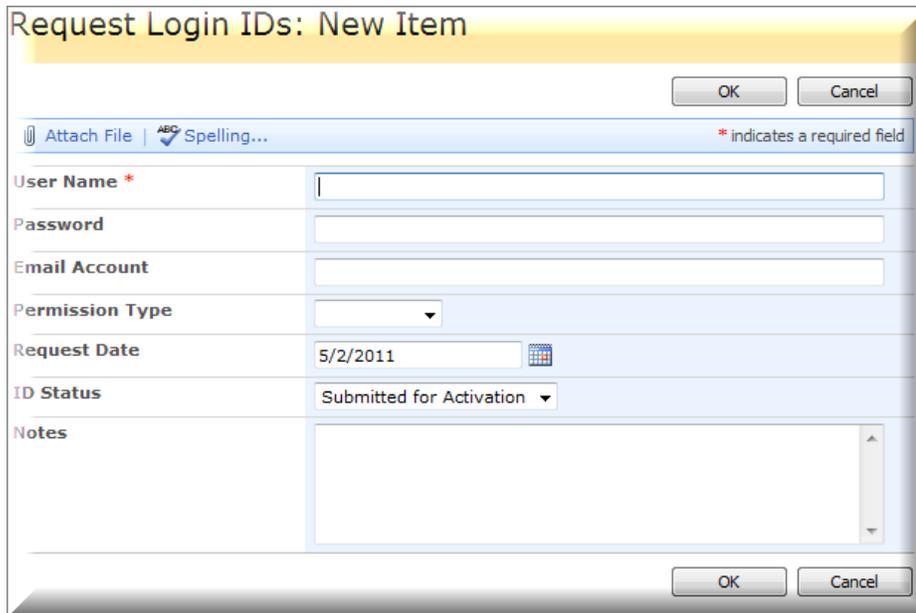
- **User Name:** *User preference – not capital sensitive*
- **Password:** *For security purposes the password must have a minimum of 8 characters, beginning with a capital letter, one numeric symbol and one symbol character from the top numeric keys.*
- **Email Account:** *It's necessary to email the user login information and login instructions - Adding an email address will also make available the Alert Features and Workflow Notifications. Please assure to enter a valid email account.*



If the Client Project Manager has a need to have another user(s) to enter/submit new requests for more users, he must email [tyler.clientadmin@tylertech.com](mailto:tyler.clientadmin@tylertech.com) and provide the user information that needs to gain access to the Request Login IDs list.

*\*Form Entry View is available by selecting New from the Request Login IDs menu bar.*





### 2.2.1. Required Information for Project Team List

- **First Name**
- **Last Name**
- **Company**  
Drop down menu gives you the option of Tyler or Client
- **Business Phone**
- **Job Title**  
Position of the employee in the Organization
- **Login ID Password** (*\*This field applies only to sites created prior 3/10/2011.*)  
For security purposes the password must have a minimum of 8 characters, beginning with a capital letter, one numeric symbol and one symbol character from the top numeric keys.
- **Email address**  
Adding your email address will enable the Alert Features and Workflow Notifications. *Please assure to enter a valid email account/address.*
- **Permission** (*\*This field applies only to sites created prior 3/10/2011.*)  
The Client Project Manager will select the appropriate permission for the new login ID User.  
**Contribute:** Can upload, delete their own items, and edit items on SharePoint lists.  
**Read:** Can view items and navigate thru the site. Changes will not be saved.
- **Request Date** (*\*This field applies only to sites created prior 3/10/2011*)  
Filled by default with the date of the request.
- **ID Status** (*\*This field applies only to sites created prior 3/10/2011*)

Filled by default with Submitted for Activation. Once processed, the Tyler SharePoint Administrator will update the ID Status to Active. Inactive and Cancelled statuses will be used for special cases where it is necessary to make the Login ID inactive when the employee has left the company or project.

This information can also be added from the Project Team list by clicking on NEW on the top bar menu. The following form view will be available:

\*Screen Shot of Project Team List Prior 3/10/2011

|                 |   |
|-----------------|---|
| #               | <input type="text"/>  |
|                 | This column is to be used to order the contact information view.  |
| Last Name *     | <input type="text"/>  |
| First Name      | <input type="text"/>  |
| Full Name       | <input type="text"/>  |
| E-mail Address  | <input type="text"/>  |
| Company         | <input type="text"/>  |
| Job Title       | <input type="text"/>  |
| Business Phone  | <input type="text"/>  |
| Home Phone      | <input type="text"/>  |
| Mobile Phone    | <input type="text"/>  |
| Fax Number      | <input type="text"/>  |
| Address         | <input type="text"/>  |
| City            | <input type="text"/>  |
| State/Province  | <input type="text"/>  |
| ZIP/Postal Code | <input type="text"/>  |
| Country/Region  | <input type="text"/>  |
| Web Page        | Type the Web address: ( <a href="#">Click here to test</a> )<br><input type="text" value="http://"/><br>Type the description:<br><input type="text"/>                             |
| Login ID        | <input type="text"/><br>Example: Maria Glass = mglass or maria.glass  |
| Password        | <input type="password"/><br>Your password will have to have least 8 characters, begin with capital letter, one numeric symbol and one symbol character from the top numeric keys. |
| Permission      | <input type="text"/>  |
| Request Date    | <input type="text" value="8/19/2009"/>  |
| ID Status       | <input type="text" value="Submitted for Activation"/>   |
| Notes           | <div style="border: 1px solid gray; padding: 5px;"> <span style="font-size: small;">A A   B / U   [List Icons]   [Link Icon]   [Image Icon]   [Print Icon]</span> </div>          |

## 3. General Notes

### 3.1. Backup Process for your Share Point Site

#### 3.1.1. Manual Backup

At anytime, copies of documents and other site content can be downloaded to the Client system. In addition, the Project Plan can be copied and pasted into an excel spreadsheet as needed.

#### 3.1.2. Tyler Automated Backup

Each evening, the Tyler SharePoint administrator completes a full backup of all the Client SharePoint sites.

#### 3.1.3. Extended Backup Service

In some occasions, Clients have requested additional backup services above the previously mentioned options. Please ask your Tyler Project Manager to arrange for a quote for your specific request.

### 3.2. The Difference Between Tasks and Homework

In order to separate the types of activities that will be shown on the project plan and ultimately all the other views that come from the plan, it's necessary to have a clear definition of the two types of action items that you will become familiar with.

#### 3.2.1. Tasks

Tasks are indicated on the Project Plan by selecting "Task" in the Display field. This is done to indicate that this item should not be displayed on the Calendar and instead will be automatically placed on the Master Task List. Should the task become overdue, it will then display on the Overdue Task List.

A Task should be thought of as a required action, not specifically involving "hands-on" work in a Tyler product. For example, the task "Load Chart of Accounts Conversion in Training Database" does not involve opening the MUNIS product or working directly with a Tyler program. As a result, most tasks will be items assigned to IT or Project Managers for completion.

#### 3.2.2. Homework

Homework is also indicated on the Project Plan by selecting "Task" in the Display field, but in addition, the field Day Type is equal to HOMEWORK. Again, this is done to indicate that this item should not be displayed on the Calendar or Task List and instead will be automatically placed on the Master Homework List. Should the task become overdue, it will then display on the Overdue Homework List.

Homework should be thought of as a required action that requires direct interaction with Tyler programs. For example, the Homework assignment "Build AP Parameters" or "Practice Invoice Maintenance" both require "hands-on" work in the programs. As a result, most Homework will be assigned to Functional Leads, Core Users and End Users.

### 3.3. Keeping the Information Current

Since the purpose of using Share Point as our project management tool is to make information more easily accessible by all those involved in the project we also think it's critical to make sure that the information is correct and up-to-date. If tasks and homework do not reflect an accurate status, it will be difficult to communicate in a timely manner and identify problems before they escalate.

The basic division of duties is as follows:

- Tyler owns keeping the tasks assigned to Tyler resources current. In addition, the Tyler PM is responsible for the list of basic tasks that make up the project plan. Tyler will most likely add tasks to the plan as time goes on.
- The Client Project Manager, or their assigns, owns the maintenance of tasks assigned to the Client.

## 4. Navigating on Your Home Page

Client SharePoint > 1 - MASTER MUNIS TEMPLATE Welcome gsouza | 



**Empowering people who serve the public™** 1 - MASTER MUNIS TEMPLATE

1 - MASTER MUNIS TEMPLATE
Financial Payroll Revenue Tyler SIS
Site Actions 

**Project Task Requests**

- Project Plan Requests

**Views**

- Master Project Plan
- Master Project Plan Calendar
- Master Issues & Actions

**Overview Pages**

- Client Overview
- Tyler Overview

**Contacts**

- Project Team
- Request Login IDs

**Tyler Teams**

- Conversion
- Project Team
- Request Login IDs

**Tyler Teams**

- Conversion

**Shared Documents**

- Client Sign Offs
- Contract Docs
- Modification Docs
- Project Docs
- Site Reports

 [Recycle Bin](#)

**Welcome to your Tyler Implementation Project!**

---

**Project Announcements**

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

Add new announcement

---

**Pending Client Acceptance**

There are no items to show in this view of the "Client Acceptance" list. To create a new item, click "New" above.

Add new item

---

**Schedule for Approval Needed**

| Phase   | ID# | Task Name | Start Date | End Date | Bill Days | Day Type | Required Attendees | Assigned to | Room / Address | Location | Confirmed | Filter | Display | Status | % | Notes |
|---|-----|-----------|------------|----------|-----------|----------|--------------------|-------------|----------------|----------|-----------|--------|---------|--------|---|-------|
| There are no items to show in this view of the "Master Project Plan" list. To create a new item, click "New" above. |     |           |            |          |           |          |                    |             |                |          |           |        |         |        |   |       |

---

**Master Project Plan Calendar**

**January, 2011**
Expand All Collapse All |

There are no items to show in this view of the "Master Project Plan" list. To create a new item, click "New" above.

---

**Master Project Plan Calendar**

**January, 2011**
Expand All Collapse All |

| January, 2011 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| 1             | 2  | 3  | 4  | 5  | 6  | 7  |
|               | 2  | 3  | 4  | 5  | 6  | 7  |
|               |    |    |    |    |    |    |
| 9             | 10 | 11 | 12 | 13 | 14 | 15 |
|               |    |    |    |    |    |    |
| 16            | 17 | 18 | 19 | 20 | 21 | 22 |
|               |    |    |    |    |    |    |
| 23            | 24 | 25 | 26 | 27 | 28 | 29 |
|               |    |    |    |    |    |    |
| 30            | 31 | 1  | 2  | 3  | 4  | 5  |
|               |    |    |    |    |    |    |

**For more information...**

-  Tyler Client Website
-  Tyler Technologies Website
-  Tyler Project Management
-  GoToMeeting

Add new link

---

**Master Overdue Project Homework**

| Task Name   | Filter | Assigned to | End Date |
|---|--------|-------------|----------|
| There are no items to show in this view of the "Master Project Plan" list. To create a new item, click "New" above. |        |             |          |

---

**Master Overdue Project Tasks**

| Task Name   | Filter | Assigned to | End Date |
|---|--------|-------------|----------|
| There are no items to show in this view of the "Master Project Plan" list. To create a new item, click "New" above. |        |             |          |

---

**Master Active Issues & Actions**

| Title   | Assigned To | Status |
|---|-------------|--------|
| There are no items to show in this view of the "Master Issues & Actions" list. To create a new item, click "New" above. |             |        |



## 4.1. Left Navigation List

The Left Navigation List provides you with easy access to core project management folders or lists during the project. The following page provides detailed descriptions of each selection option.

|                                |    |
|--------------------------------|----|
| <b>Project Task Requests</b>   |    |
| ▪ Project Plan Requests        | 1  |
| <b>Views</b>                   |    |
| ▪ Master Project Plan          | 2  |
| ▪ Master Project Plan Calendar | 3  |
| ▪ Master Issues & Actions      | 4  |
| <b>Overview Pages</b>          |    |
| ▪ Client Overview              | 5  |
| ▪ Tyler Overview               | 6  |
| <b>Contacts</b>                |    |
| ▪ Project Team                 | 7  |
| ▪ Request Login IDs            | 8  |
| <b>Tyler Teams</b>             |    |
| ▪ Conversion                   | 9  |
| ▪ Installation                 | 10 |
| ▪ Technical Support            | 11 |
| ▪ Transitional Services        | 12 |
| ▪ TylerForms                   | 13 |
| <b>Shared Documents</b>        |    |
| ▪ Client Sign Offs             | 14 |
| ▪ Contract Docs                | 15 |
| ▪ Modification Docs            | 16 |
| ▪ Project Docs                 | 17 |
| ▪ Site Reports                 | 18 |
| ▪ Recycle Bin                  | 19 |

to

1. [LISTS - PROJECT PLAN REQUESTS](#) – This link takes you to a screen which provides a place for the Client Project Manager to request an addition to the Master Project Plan. Entering the key pieces of information in this format allows the Tyler Project Manager review the material, ensure it is not duplicated elsewhere, and add it to the plan in the appropriate place. <Screenshot link>

2. [VIEWS - MASTER PROJECT PLAN](#) – This link takes you to the complete project plan, inclusive of all phases, modules and task items. <Screenshot link>

3. [VIEWS - MASTER PROJECT PLAN CALENDAR](#) – This link takes you to the complete project calendar, inclusive of all phases, modules, milestones and schedules that have been approved. The Project Plan Field “CONF” must equal “Yes” and the “DISPLAY” field must equal “CAL”. <Screenshot link>

4. [VIEWS – Master Issues & Actions](#) – This link takes you to all modules Issues & Actions items from the Master Issues & Actions List. Master Issues & Actions is a separated list from the Master Project Plan list.

5. [OVERVIEW PAGES - CLIENT OVERVIEW](#) – This link takes you to a page that contains the Client’s Website as well as offering additional places for links and document libraries. <Screenshot link>

6. [OVERVIEW PAGES - TYLER OVERVIEW](#) – This link takes you to a page that contains the Tyler Technology Website as well as offering additional informative links and an option to add document libraries. <Screenshot link>

7. [CONTACTS - PROJECT TEAM](#) – This link takes you to a page that should be maintained to identify all project contacts and associated information.

8. [CONTACTS – Project Team View: Request Login IDs](#) - The link takes you to a slightly modified view of the Project Team list for sites created prior to 3/10/2011. As

the request for the login ID User is entered, the information is also populating the Project Team contact information. This table view is intended to provide the Client with a datasheet that makes bulk data entry less time consuming. On Client SharePoint Sites created later then 03/10/2011 the link takes you to separated list from the Project Team List with limited access to only authorized user(s) by the client.

9.

10. [TYLER TEAMS - CONVERSION](#) – This link takes you to a page that provides an overview of the Tyler Data Conversion process, links to other sources of related information, and critical documents on the transfer of data, detail of the process, etc.

11. [TYLER TEAMS - INSTALLATION](#) - This link takes you to a page that outlines the OSDBA services available, provides links to other sources of related information, and an informative document on the initial installation process.

12. [TYLER TEAMS - TECHNICAL SUPPORT](#) – This link takes you to a page that is host to a large amount of critical information that will benefit you in making sure that your relationship with Tyler Support is positive and meets expectations for service. There are also guidelines for setting up your Client Portal, a tool that allows you to enter and monitor Support Calls online, as well as links to other Support related subjects.

---

13. [TYLER TEAMS - TRANSITIONAL SERVICES](#) – This link takes you to a page that outlines the services and purpose of the Transitional Services Team. Once Implementation has completed delivering major services for a phase or module grouping, Transitional Services will be delivered by this team to ensure the continuation of focused project support.

14. [TYLER TEAMS - TYLER FORMS](#) - This link takes you to a page that provides an overview of the Tyler Forms and Tyler Content Manager offerings as well as documents that will be useful during the implementation of these products.

15. [SHARED DOCUMENTS – CLIENT SIGN OFFS](#) – This link takes you to a page that contains folders for each major module grouping. The Tyler Project Manager will post sign-offs to the appropriate folder location triggering a workflow notification (Workflow may or may not be activated by the Project Managers - See Creating Workflow instructions) to the Client Project Manager. Once reviewed, the Client Project Manager may accept, reject and add comments to the notice electronically. The Tyler Project Manager is then notified of the outcome and may respond accordingly. The types of sign offs that will be handled in this manner are things like Conversion Acceptance, Authorization to Load Conversions into the LIVE Database, Authorization to Move Forward at a Critical Stop, Go LIVE Authorization, etc.

16. [SHARED DOCUMENTS – CONTRACT DOCS](#) – This link takes you to a page that contains folders for copies of the original contract as well as any Change Orders or subsequent Product Order Forms.

17. [SHARED DOCUMENTS – MODIFICATION DOCS](#) – This link takes you to a page that contains a folder, Contract Modifications, for information, specifications, and tracking of program modifications that were incorporated into the primary contract. The second folder, Requests for Development Quote (RFQ), contains subfolders for tracking post-contract requests and a form for requesting enhancements.

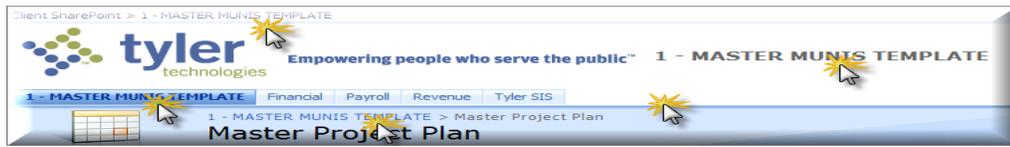
18. [SHARED DOCUMENTS – PROJECT DOCS](#) – This link takes you to a page that contains numerous subfolders of importance to the project as a whole. In addition, the Kick-Off PowerPoint presentation and the working version of the Implementation Plan Document will be maintained here.

- Agendas - will contain all training session agendas for the duration of the project, sorted by the Start Date of the session.
- Code Management & Conversion Tracking – will contain information documenting the submission, delivery, validation and final status of conversion passes.
- Tyler Reporting Services – will contain training materials and potentially custom reports
- Tyler Consulting Services – if purchased, all TCS deliverables will be posted to this folder, including Best Practice Recommendations and Desktop Docs.
- And More – Financial, Payroll-HR, Revenue and sub-folders may be added for specific documentation.

19. [SHARED DOCUMENTS – SITE REPORTS](#) – This link takes you to a page that contains Site Reports folders separated by Module Grouping, such as Financials, Payroll, Revenue, etc. as well as a separate folder for Status Reports prepared by your Tyler Project Manager. These reports should be reviewed as often as possible to monitor the details of each Tyler session.

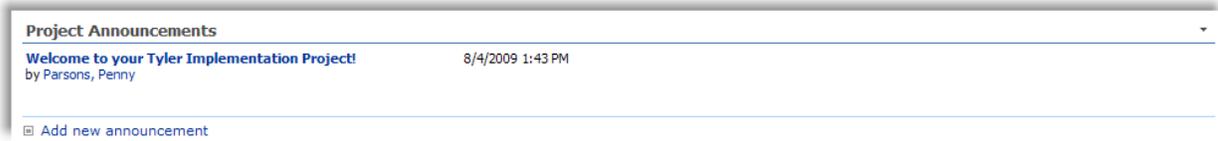
20. [RECYCLE BIN](#) – Any deleted item (word doc, excel, pdf, SharePoint Library or List, a single line item will be found into the Recycle Bin and can be restored.

To return to the home page at any time, simply click in on the tab or one of the path links as illustrated below:

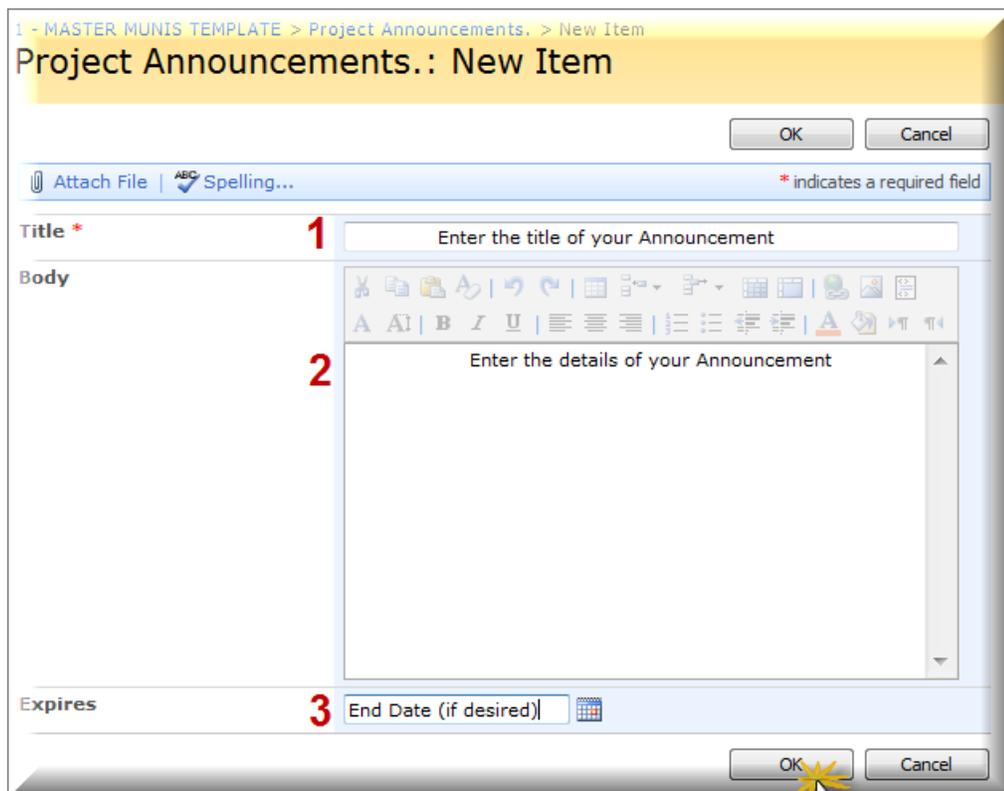


## 4.2. Central Viewing Pane

### 4.2.1. Project Announcements



This Web Part area should be used for all Project-related announcements and Staff should be encouraged to review this area regularly. Simply click "Add new announcement" to access the entry screen.



The screenshot shows the "Project Announcements.: New Item" form. It includes a title field (1), a body field with a rich text editor (2), and an expires field (3). The form also has "OK" and "Cancel" buttons at the top and bottom.

1 - MASTER MUNIS TEMPLATE > Project Announcements. > New Item  
Project Announcements.: New Item

Attach File | Spelling... \* indicates a required field

Title \* 1 Enter the title of your Announcement

Body 2 Enter the details of your Announcement

Expires 3 End Date (if desired)

OK Cancel

## 5. Alerts

SharePoint offers Alerts functionalities to all users that have an active email account attached to their User ID profile.

\*It is necessary to provide an email account to the Tyler SharePoint Admin at the moment you are requesting Login IDs for the client users.

The Alert feature of a SharePoint Site sends e-mail notifications to interested site members whenever another member changes some aspect of the Team Site. Each member decides which lists, libraries, or documents they want to receive alerts about.

You can specify how frequently you want to receive alerts. You can have them appear immediately, or as daily or weekly summaries. When you no longer need to follow changes for the list, library, item, or file, you can delete your alerts at any time

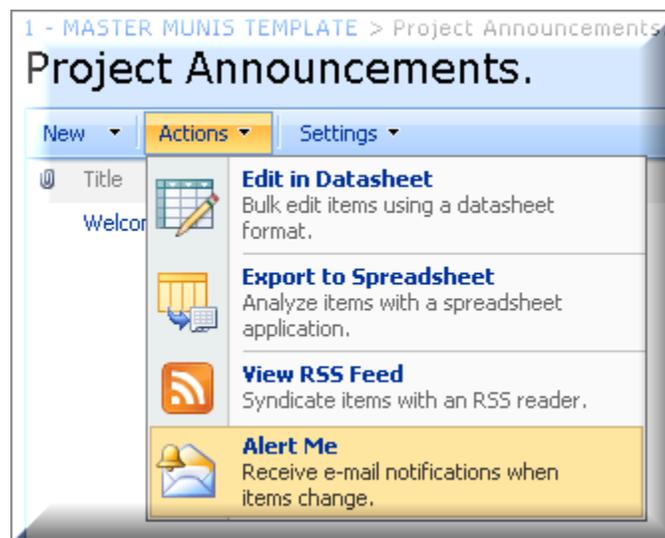
### 5.1. Creating Your Alert

Under each List or Document Library created on SharePoint site you can select on the Menu Bar>Actions>Alert Me and select the appropriate timing and changes you would like to be alerted on.



#### IMPORTANT NOTE!

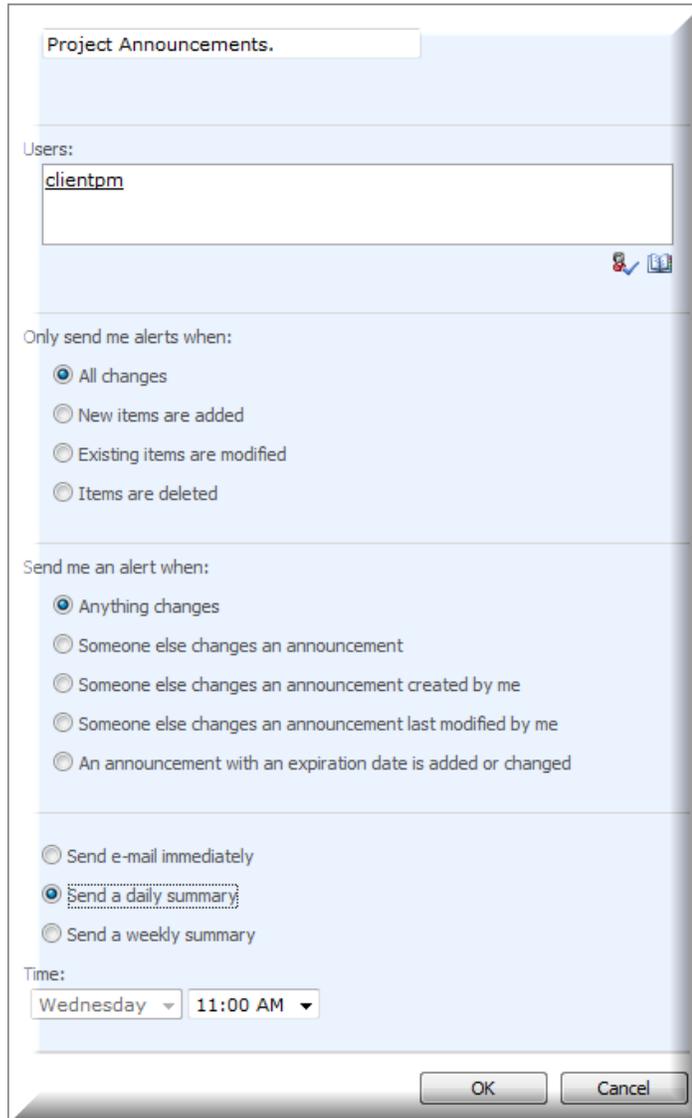
Currently the links for the documents, list items, or workflows embedded in the Alerts emails are not functional for those outside users of the Tyler Intranet. We are looking for a solution for this. The client users will need to follow the login instructions in order to access word documents, PDFs, excel sheets, and list items details into their Client SharePoint Site. For Announcements list type the message will be included to the email Alert.



Please see screen shot for the Alerts Settings. We recommend a daily alert summary in order to avoid overload of emails into your Inbox.

1. In the **Send Alerts To** section, confirm that the user ID is correct.

2. In the **Change Type** section, specify whether you want to be notified when items have been **Added, Changed, Deleted**, or click **All Changes** to be notified whenever any type of change occurs.
3. In the **Alert Frequency** section, select the option that reflects how often you want to be notified of changes.
4. Click **OK**.
5. An Email will be immediately sent to you notifying that you alert has been successfully set up.

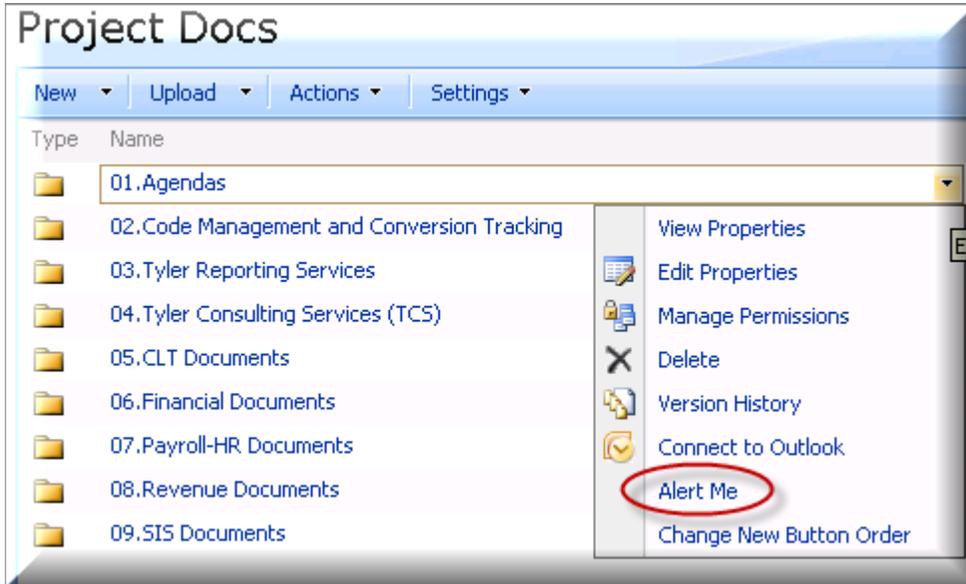


The screenshot shows a dialog box titled "Project Announcements." with the following sections:

- Users:** A text box containing "clientpm" with a search icon and a checkmark icon to its right.
- Only send me alerts when:** A group of radio buttons with the following options:
  - All changes
  - New items are added
  - Existing items are modified
  - Items are deleted
- Send me an alert when:** A group of radio buttons with the following options:
  - Anything changes
  - Someone else changes an announcement
  - Someone else changes an announcement created by me
  - Someone else changes an announcement last modified by me
  - An announcement with an expiration date is added or changed
- Send e-mail:** A group of radio buttons with the following options:
  - Send e-mail immediately
  - Send a daily summary
  - Send a weekly summary
- Time:** Two dropdown menus showing "Wednesday" and "11:00 AM".
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

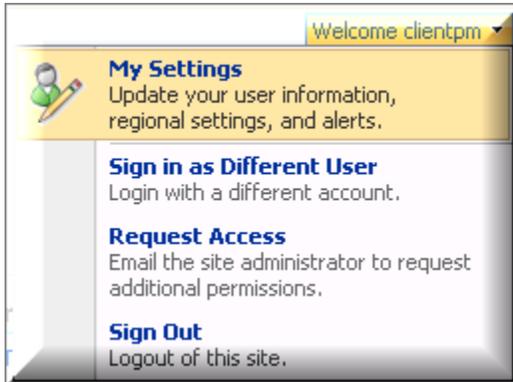
The users with Contribute permission have the ability to set Alerts for the site users by using the Check Names or the Users Library .

**\*Alerts set from the Library Menu Bar will apply to the entire library content (folders, documents, etc).** To set up an Alert to a folder/document level just browse your mouse on the top of the item, click on the chevron on the right to access the item drop down menu, and select Alert Me option.

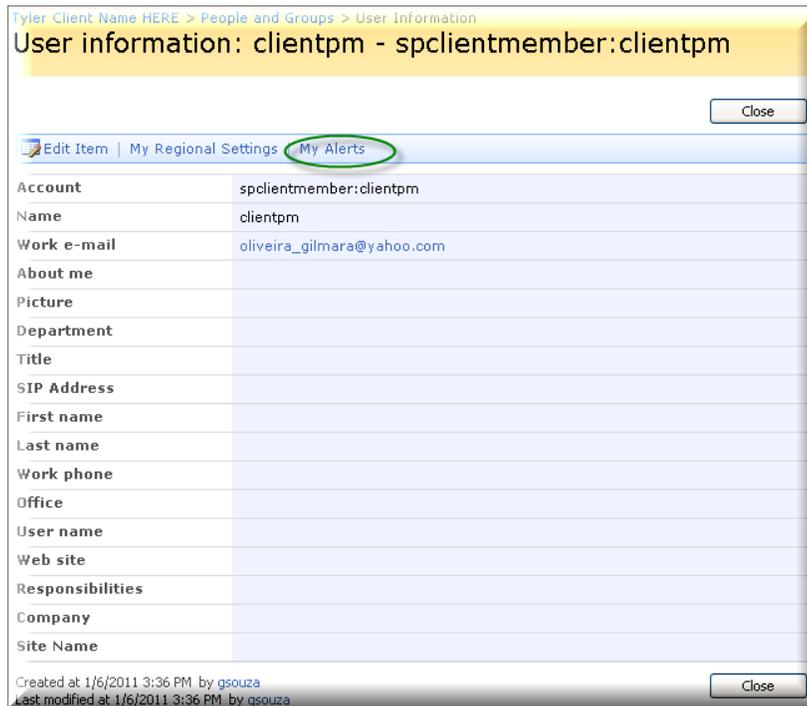


## 5.2. Managing Existing (My) Alerts

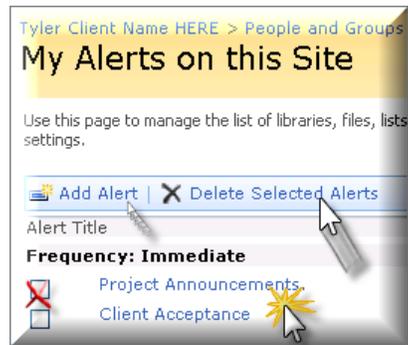
You can also add an alert to a List or Document Library from **My Settings**. On the upper right of the SharePoint site you will find . Click on the arrow on the right corner to access your settings menu.



### 1. selecting My Alerts



### 2. A list of all existent Alerts will be shown and by clicking on the hyperlinked alerts settings you can delete, modify, or add more alerts.



## 6. Workflow

Workflow may be applied to your site by the Tyler Project Manager. The workflow will benefit both parts involved in the implementation process in quickly gathering the documentation and the approval necessary to move forward with your project. It may be applied to a task on the Master Project Plan or to a document.

Below are sample of workflow process.

### 6.1. Workflow Steps

1. Tyler Project Manager sets the workflow on a SharePoint List or SharePoint Library - See SharePoint Guide Manual "Populating a SharePoint Project Plan" workflow Step By Step
2. Tyler Project Manager starts the workflow from List>Task or Library>Doc
3. An email from [tyler.share@tylertech.com](mailto:tyler.share@tylertech.com) SharePoint email account will be sent to workflow Owner and Approver.



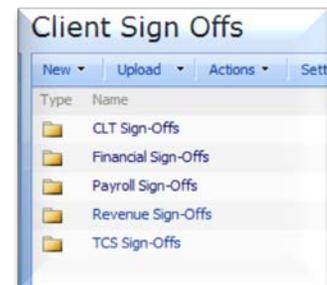
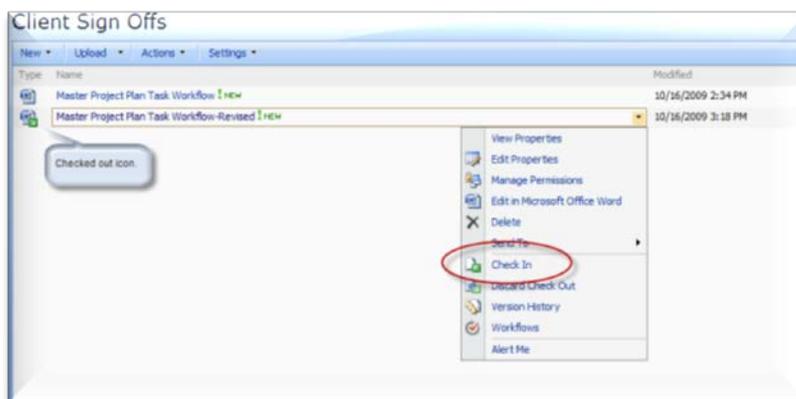
 The workflow approver needs to login to the SharePoint site by using the Login Instructions to access the item that requests your approval. The hyperlinked text embedded in the Notifications/Alerts/Reminders emails will work only for Tyler Staff. *The Tyler SharePoint Administrator is working on a solution for the Alert links.*

4. Workflow Approver needs to follow the login instructions to complete the approval.
5. Emails from [tyler.share@tylertech.com](mailto:tyler.share@tylertech.com) SharePoint email account will be sent to workflow Owner and Approver with status.

### **IMPORTANT NOTE!**

Please make sure that you will have the document Checked In once you done with your changes.

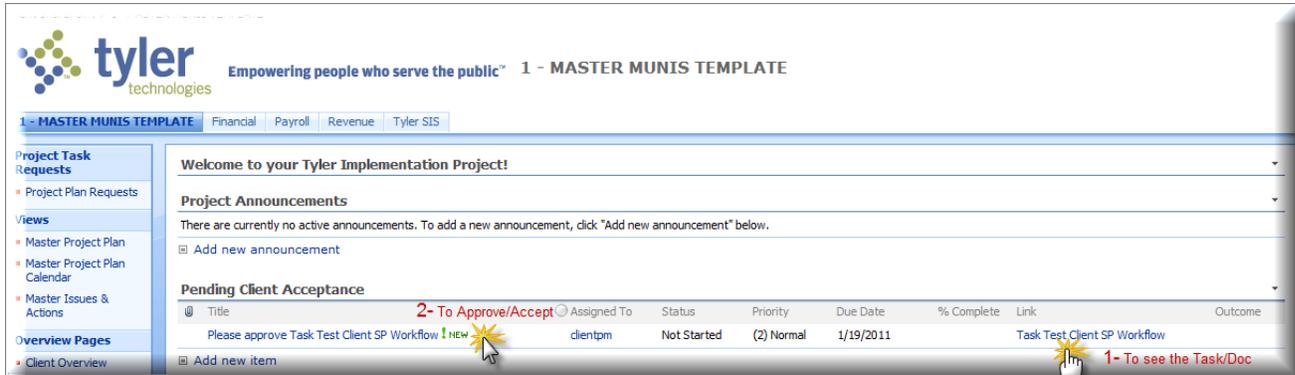
To assure this please go to the Client Sign Offs, select the appropriate folder and check if the document is checked back in.



## 6.2. Workflow Approval Process

Logged to your site please follow the instructions for approving the task/document.

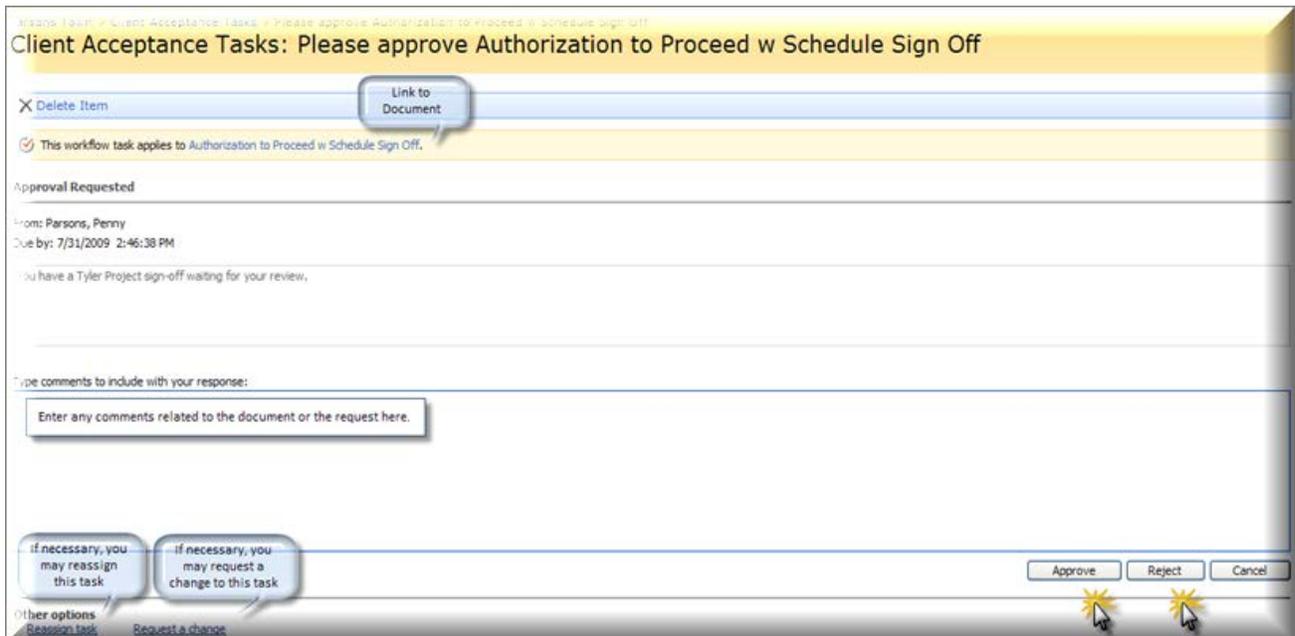
This Web Part “Pending Client Acceptance” is designed to provide immediate notification to the Client Project Manager that there are critical sign-offs requiring attention in order to move forward with related project activities. As the Tyler Project Manager posts sign-off documents to the Client Sign Offs Shared Documents folder, workflow is started and the Client PM is notified by email (Content example below) that there is an action required.



The screenshot shows the Tyler Project Management interface. The main content area is titled "Pending Client Acceptance" and contains a table with the following data:

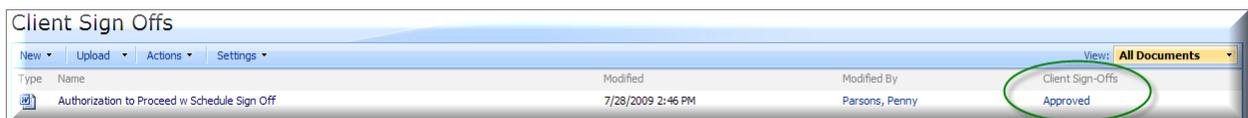
| ID | Title                                       | Assigned To | Status      | Priority   | Due Date  | % Complete | Link                         | Outcome |
|----|---|-------------|-------------|------------|-----------|------------|------------------------------|---------|
|    | Please approve Task Test Client SP Workflow | clientpm    | Not Started | (2) Normal | 1/19/2011 |            | Task Test Client SP Workflow |         |

Annotations in the image include a yellow starburst with "2- To Approve/Accept" pointing to the "Status" column, and another yellow starburst with "1- To see the Task/Doc" pointing to the "Link" column.



The screenshot shows the "Client Acceptance Tasks" workflow form. The title is "Client Acceptance Tasks: Please approve Authorization to Proceed w Schedule Sign Off". The form includes a "Delete Item" button, a "Link to Document" button, and a checkbox indicating that the workflow task applies to the document. The "Approval Requested" section shows the request is from "Parsons, Penny" with a due date of "7/31/2009 2:46:38 PM". A text box prompts the user to "Enter any comments related to the document or the request here." At the bottom, there are buttons for "Approve", "Reject", and "Cancel", along with "Reassign Task" and "Request a Change" options.

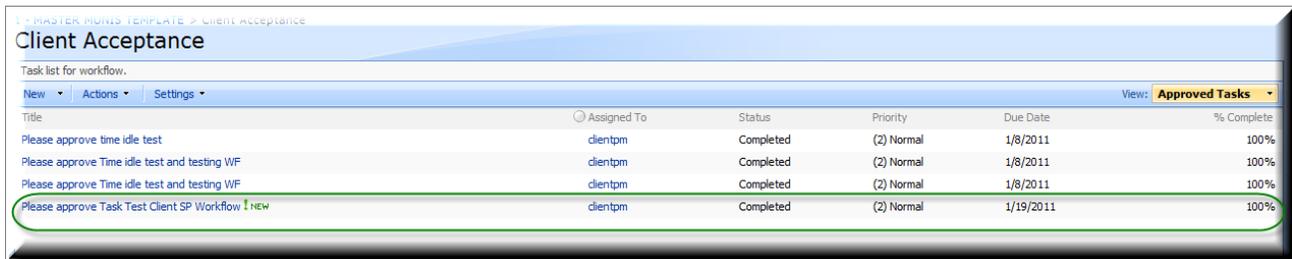
When approval has been granted, the status is automatically updated electronically on Client Sign Offs and under Client Acceptance.



The screenshot shows the "Client Sign Offs" list view. The table contains the following data:

| Type     | Name   | Modified          | Modified By    | View                         |
|----------|--|-------------------|----------------|------------------------------|
| Document | Authorization to Proceed w Schedule Sign Off | 7/28/2009 2:46 PM | Parsons, Penny | Client Sign-Offs<br>Approved |

The "Approved" status in the "View" column is circled in green.



Once all the steps above are completed the task will be removed from the main page of your site.

An Email follow up will be send during the Workflow process to the approver and Cc the Tyler Project Manager for workflows applied to tasks from the Master Project Plan and to documents from Client Sign Offs Library.

### 6.2.1. Client Acceptance: Views

By clicking on the web part title Pending Client Acceptance at the main page of your client SharePoint site you can access the “Client Acceptance” workflow task list and the view box at the right side of the page. The default view will show the tasks of documents waiting for approval.

On the right hand side you have view box options.



### 6.2.2. Rejected Item

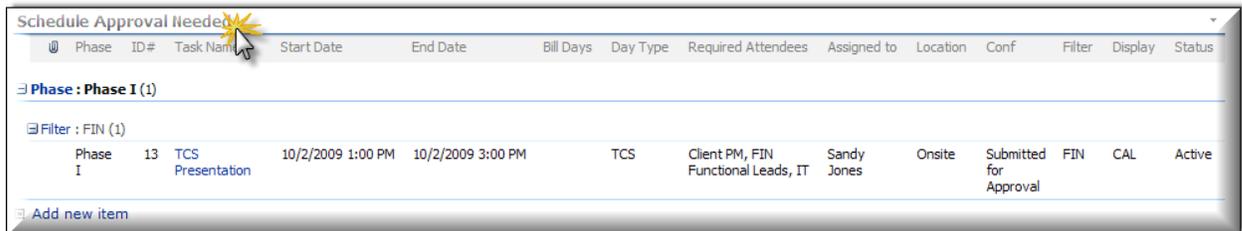
An email will be sent to the Tyler Project Manager notifying the rejection.

Please do not delete the rejected item.

### 6.2.3. Schedule Approval Needed

| Phase               | ID# | Task Name        | Start Date        | End Date          | Bill Days | Day Type | Required Attendees                  | Assigned to | Location | Conf                   | Filter | Display | Status |
|---------------------|-----|------------------|-------------------|-------------------|-----------|----------|-------------------------------------|-------------|----------|------------------------|--------|---------|--------|
| Phase : Phase I (1) |     |                  |                   |                   |           |          |                                     |             |          |                        |        |         |        |
| Filter : FIN (1)    |     |                  |                   |                   |           |          |                                     |             |          |                        |        |         |        |
| Phase I             | 13  | TCS Presentation | 10/2/2009 1:00 PM | 10/2/2009 3:00 PM | TCS       |          | Client PM, FIN Functional Leads, IT | Sandy Jones | Onsite   | Submitted for Approval | FIN    | CAL     | Active |

This Web Part is designed to provide immediate notification to the Client Project Manager that new schedules have been posted for Client Project Manager review and acceptance or rejection.



By clicking on the title bar Schedule Approval Needed, a new screen is opened to provide additional detail for informed resource scheduling.

| Phase   | ID# | Start Date         | End Date           | Task Name                            | Required Attendees                  | Conf                   | Bill Days | Day Type  | Status |
|---------|-----|--------------------|--------------------|--------------------------------------|-------------------------------------|------------------------|-----------|-----------|--------|
| Phase I | 1   | 9/1/2009 12:00 AM  | 9/1/2009 12:00 AM  | Contract Signing                     |                                     | Yes                    |           | MILESTONE |        |
| Phase I | 2   | 10/1/2009 08:30 AM | 10/2/2009 11:30 AM | Project or Phase Kick-off            | Client PM, FIN Functional Leads, IT | Yes                    | 1.5       | CON       | Onst   |
| Phase I | 9   | 10/2/2009 11:30 AM | 10/2/2009 12:00 PM | Tyler Forms Kick-off Conference Call | Client PM, FIN Functional Leads, IT | Yes                    |           | CDN       | Tele   |
| Phase I | 13  | 10/2/2009 01:00 PM | 10/2/2009 03:00 PM | TCS Presentation                     | Client PM, FIN Functional Leads, IT | Submitted for Approval |           | TCS       | Onst   |
| Phase I | 14  | 10/2/2009 03:00 PM | 10/2/2009 04:30 PM | Discuss Phase I Schedule             | Client PM, FIN Functional Leads, IT | Yes                    | 0.5       | CON       | Onst   |

The new "datasheet" view (\*) that displays contains not only the events "Submitted for Approval", but those already with a "Yes" in the Confirmed (Conf) field. This is by design so the Client PM can make sure that Required Attendees in new schedule requests don't conflict with existing schedule obligations.

 **IMPORTANT NOTE!**

(\*) Edit in Datasheet mode requires MS Office 2007 or Higher.

| Conf                   | Bill Days | Day Type  | Location | Assigned to | Filter | Display | Status | Module | Room/Address |
|------------------------|-----------|-----------|----------|-------------|--------|---------|--------|--------|--------------|
| Yes                    |           | MILESTONE |          |             | ALL    | CAL     | Active |        |              |
| Yes                    | 1.5       | CON       | Onsite   | P Parsons   | FIN    | CAL     | Active |        | City Hall    |
| Yes                    |           | CON       | TeleConf | Joanne Lord | FIN    | CAL     | Active |        | City Hall    |
| Submitted for Approval |           | TCS       | Onsite   | Sandy Jones | FIN    | CAL     | Active |        | IT Conf Room |
| Yes                    | 0.5       | CON       | Onsite   | P Parsons   | FIN    | CAL     | Active |        | City Hall    |

This screen is also helpful in managing facilities so training rooms are not overbooked.

Once the schedule has been cleared, simply click on the dropdown box in the Confirmed field and select "Yes". The information is automatically posted to the calendar now that it's been approved. Also, it will no longer show in the "Schedule Approval Needed" list.

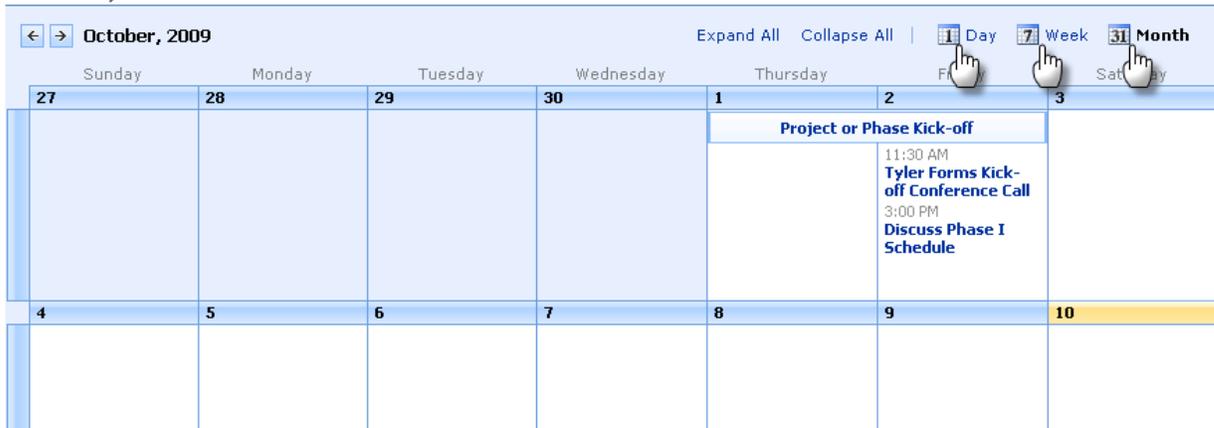
| Start Date         | End Date           | Task Name                            | Required Attendees                  | Confirmed              | Bill |
|--------------------|--------------------|--------------------------------------|-------------------------------------|------------------------|------|
| 9/1/2009 12:00 AM  | 9/1/2009 12:00 AM  | Contract Signing                     |                                     | Yes                    |      |
| 10/1/2009 08:30 AM | 10/2/2009 11:30 AM | Project or Phase Kick-off            | Client PM, FIN Functional Leads, IT | Yes                    |      |
| 10/2/2009 11:30 AM | 10/2/2009 12:00 PM | Tyler Forms Kick-off Conference Call | Client PM, FIN Functional Leads, IT | Yes                    |      |
| 10/2/2009 01:00 PM | 10/2/2009 03:00 PM | TCS Presentation                     | Client PM, FIN Functional Leads, IT | Submitted for Approval |      |
| 10/2/2009 03:00 PM | 10/2/2009 04:30 PM | Discuss Phase I Schedule             | Client PM, FIN Functional Leads, IT | Yes                    |      |

Should the schedule be rejected, the Tyler Project Manager is notified of the rejection and can attempt to find a date that is acceptable. The item continues to appear in the Master Project Plan but will remain "Rejected" until the Tyler PM resubmits it for approval on a different date.

|         |                      |    |    |                  |                   |                   |     |                                     |             |        |              |          |     |     |
|---------|----------------------|----|----|------------------|-------------------|-------------------|-----|-------------------------------------|-------------|--------|--------------|----------|-----|-----|
| Phase I | 2 - Project Planning | 13 | 0% | TCS Presentation | 10/2/2009 1:00 PM | 10/2/2009 3:00 PM | TCS | Client PM, FIN Functional Leads, IT | Sandy Jones | Onsite | IT Conf Room | Rejected | FIN | CAL |
|---------|----------------------|----|----|------------------|-------------------|-------------------|-----|-------------------------------------|-------------|--------|--------------|----------|-----|-----|

### 6.2.4. Master Project Plan Calendar

#### Master Project Plan Calendar



The Master Project Plan Calendar Web Part gives you an easy way to see all project activities that are chosen to be viewed on the Calendar, across all phases and modules, if the Confirmed field is "Yes".

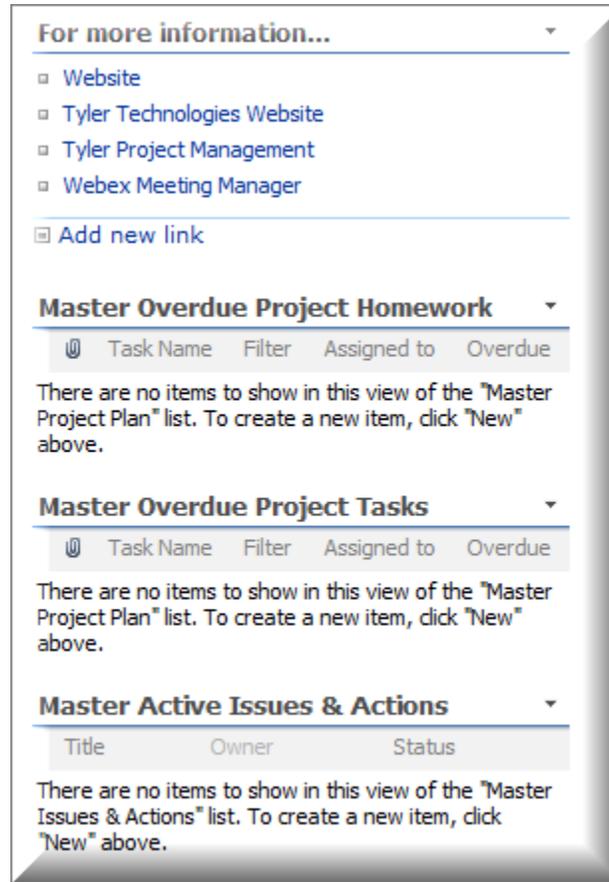
You may also choose to see the Calendar in a list view by clicking on the Master Project Plan Calendar title field.



The following view results, grouped by Phase. As with the Calendar view, only items with the Display equal to CAL are shown here.

| Phase               | WBS                  | ID# | % Comp | Task Name                            | Start Date         | End Date           | Bill Days | Day Type  | Required Attendees                  | Assigned to | Location | Confirmed | Filter | Display | Status | Module | Room/Address |
|---------------------|----------------------|-----|--------|--------------------------------------|--------------------|--------------------|-----------|-----------|-------------------------------------|-------------|----------|-----------|--------|---------|--------|--------|--------------|
| Sum = 2             |                      |     |        |                                      |                    |                    |           |           |                                     |             |          |           |        |         |        |        |              |
| Phase : Phase I (5) |                      |     |        |                                      |                    |                    |           |           |                                     |             |          |           |        |         |        |        |              |
| Sum = 2             |                      |     |        |                                      |                    |                    |           |           |                                     |             |          |           |        |         |        |        |              |
| Phase I             | 1 - Initiation       | 1   | 0%     | Contract Signing                     | 9/1/2009 12:00 AM  | 9/1/2009 12:00 AM  |           | MILESTONE |                                     |             |          | Yes       | ALL    | CAL     | Active |        |              |
| Phase I             | 1 - Initiation       | 2   | 0%     | Project or Phase Kick-off            | 10/1/2009 8:30 AM  | 10/2/2009 11:30 AM | 1.5       | CON       | Client PM, FIN Functional Leads, IT | P Parsons   | Onsite   | Yes       | FIN    | CAL     | Active |        | City Hall    |
| Phase I             | 2 - Project Planning | 9   | 0%     | Tyler Forms Kick-off Conference Call | 10/2/2009 11:30 AM | 10/2/2009 12:00 PM |           | CON       | Client PM, FIN Functional Leads, IT | Joanne Lord | TeleConf | Yes       | FIN    | CAL     | Active |        | City Hall    |
| Phase I             | 2 - Project Planning | 13  | 0%     | TCS Presentation                     | 10/2/2009 1:00 PM  | 10/2/2009 3:00 PM  |           | TCS       | Client PM, FIN Functional Leads, IT | Sandy Jones | Onsite   | Rejected  | FIN    | CAL     | Active |        | IT Conf Room |
| Phase I             | 2 - Project Planning | 14  | 0%     | Discuss Phase I Schedule             | 10/2/2009 3:00 PM  | 10/2/2009 4:30 PM  | 0.5       | CON       | Client PM, FIN Functional Leads, IT | P Parsons   | Onsite   | Yes       | FIN    | CAL     | Active |        | City Hall    |

### 6.3. Right Viewing Pane



#### 6.3.1. For More Information

This Web Part allows you to post links to frequently used Websites. When you first access your Share Point site, Tyler has already populated this section with several known sites of interest. You may continue to add links as you wish by clicking:



#### 6.3.2. Master Overdue Project Tasks

This Web Part allows the Client Project Manager to immediately view all overdue Project Tasks directly from the main page. This information includes all tasks from all phases and modules. Basic information is provided, including who the owner of the task is, so follow up can be achieved easily. The number of days that the task is overdue is also indicated. Keep in mind that all tasks are listed on the Project Plan and this is simply a linked view that allows editing of the plan in a different way.

| Master Overdue Project Tasks              |        |                        |         |
|---|--------|------------------------|---------|
| Task Name                                 | Filter | Assigned to            | Overdue |
| Phase : Phase I (1)                       |        |                        |         |
| City Provides Tyler with Plan Doc Updates | FIN    | Client Project Manager | 9       |

Often this list provides the Client PM with an opportunity to find tasks that are actually completed, but have not been marked as complete on the Project plan. You may click directly on the task to edit it and make any changes, including marking it as complete.

| Master Overdue Project Tasks              |        |                        |         |
|---|--------|------------------------|---------|
| Task Name                                 | Filter | Assigned to            | Overdue |
| Phase : Phase I (1)                       |        |                        |         |
| City Provides Tyler with Plan Doc Updates | FIN    | Client Project Manager | 9       |

The following screen opens. Click Edit Item to update the information.

Master Project Plan: City Provides Tyler with Plan Doc Updates

Close

New Item | Edit Item | Delete Item | Manage Permissions | Alert Me

|              |                      |
|--------------|----------------------|
| Phase        | Phase I              |
| WBS          | 2 - Project Planning |
| Sub Category |                      |
| ID#          | 16                   |
| % Comp       | 0%                   |
| Module       |                      |

If changing the completion status, change the % Comp field to reflect the actual progress.

Master Project Plan: City Provides Tyler with Plan Doc Updates

OK Cancel

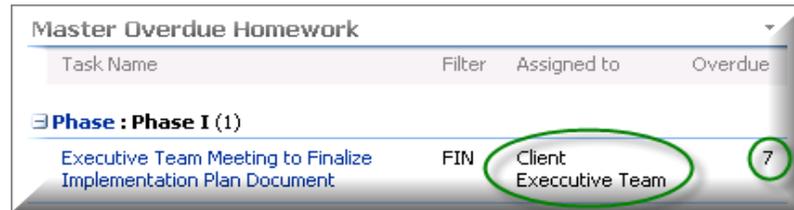
Attach File | Delete Item | Spelling...

|              |                      |
|--------------|----------------------|
| Phase        | Phase I              |
| WBS          | 2 - Project Planning |
| Sub Category |                      |
| ID#          | 16                   |
| % Comp       | 0%                   |
| Module       |                      |

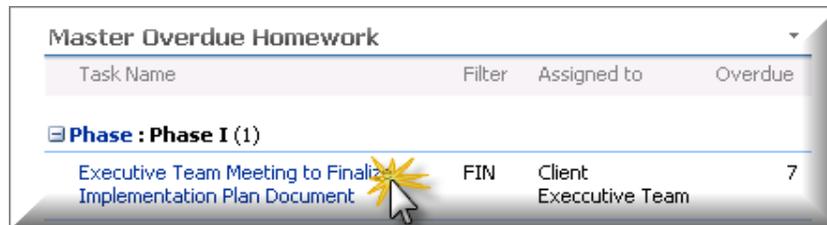
Once the % Comp is 100%, the task will no longer show in the Master Overdue Project Tasks list.

### 6.3.3. Master Overdue Homework

This Web Part provides quick notification of any overdue Project Homework, across all phases and modules, with the same capabilities for editing that are available in Master Overdue Project Tasks, above. Keep in mind that all homework is listed on the Project Plan and this is simply a linked view that allows editing of the plan in a different way.



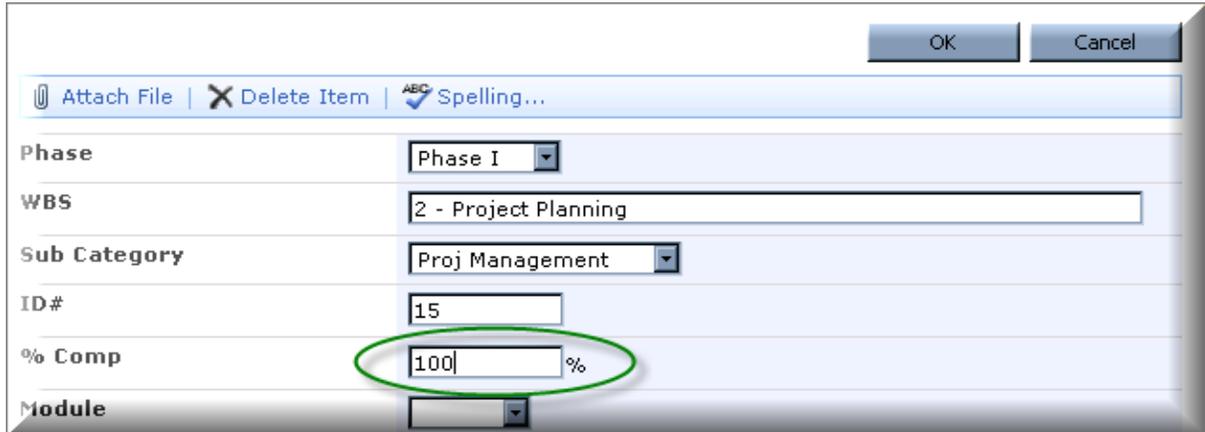
Regular monitoring of this information will be critical to ensuring that scheduled training, conversion validation and other key tasks may proceed as scheduled since many of them are dependent on homework assignments timely completion. Often this list provides the Client PM with an opportunity to find tasks that are actually completed, but have not been marked as complete on the Project plan. You may click directly on the task to edit it and make any changes, including marking it as complete.



The following screen opens. Click Edit Item to update the information.



If changing the completion status, change the % Comp field to reflect the actual progress.



The screenshot shows a SharePoint form with the following fields and values:

- Phase: Phase I
- WBS: 2 - Project Planning
- Sub Category: Proj Management
- ID#: 15
- % Comp: 100 (circled in green)
- Module: (empty)

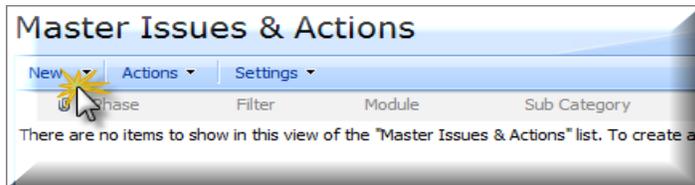
Once the % Comp is 100%, the homework assignment will no longer show in the Master Overdue Homework view.

### 6.3.4. Master Active Project Issues & Actions

This Web Part is intended to provide a place to view Active issues and resulting actions and is not connected to the Project Plan in anyway. Adding items to this list will not impact any other part of the Share Point Site.

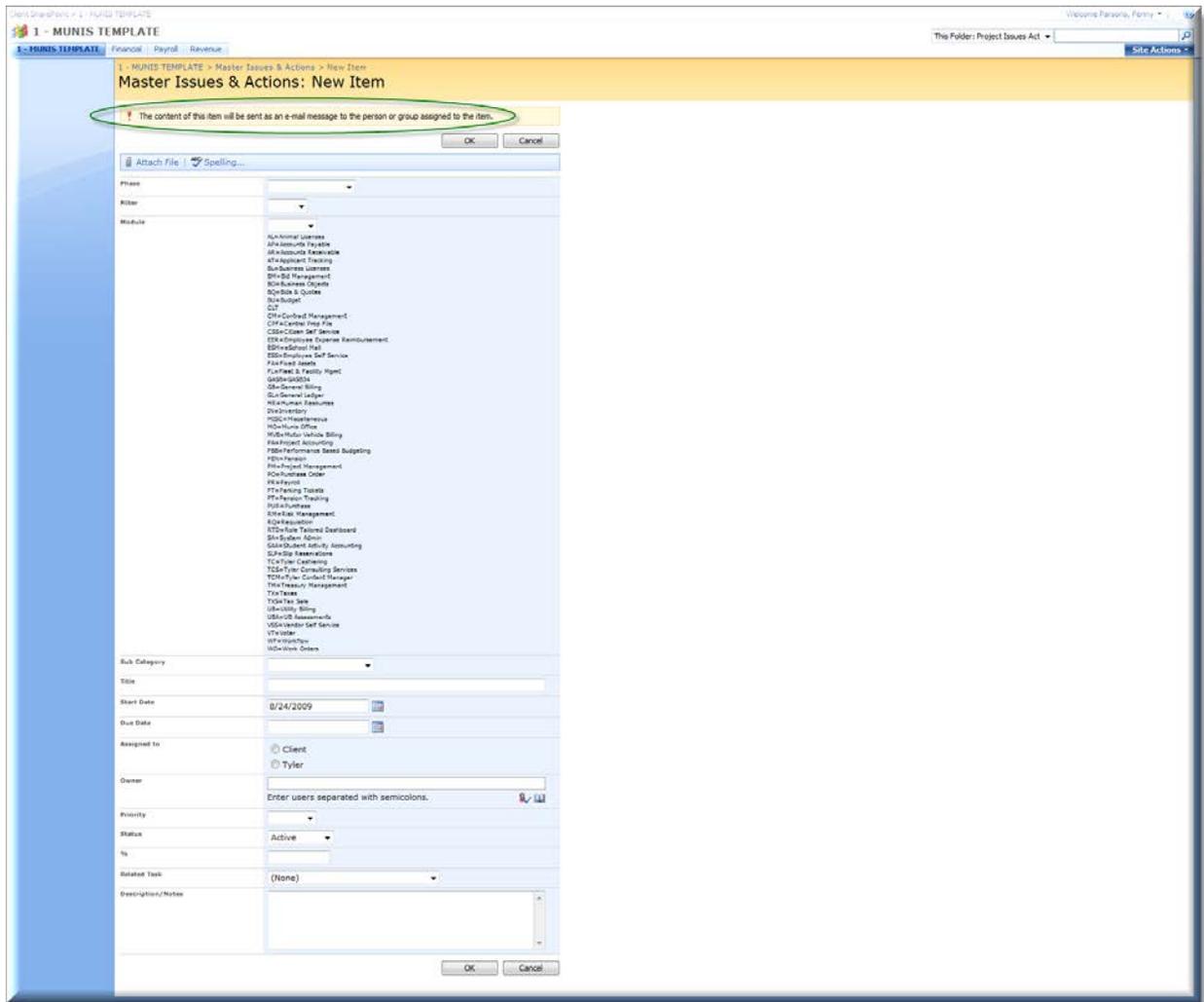


New Issues should be added by clicking on the Title bar. The following window opens. Select "New".



The following screen will open. Please note that the once set up to do so, the content of this new Issue will also be emailed to the assigned Issue/Action Owner. By clicking on "Add new item", you are automatically put into the edit mode. Fill out the fields as appropriate on this screen. Whenever possible, please take advantage of the opportunity to select Related Issues from those already entered in this list and to use the paperclip function to add a screen print or further documentation of the issue.

The Client Project Manager, Client Functional Leads, and Tyler Implementation staff should regularly enter items, and monitor and complete them as is appropriate.



The issue will now appear on the Main Page under Project Issues and Actions.

| Project Issues & Actions            |             |          |
|-------------------------------------|-------------|----------|
| Title                               | Assigned to | Priority |
| <b>Status : Active (1)</b>          |             |          |
| Unable to add new Vendor <b>NEW</b> | Tyler       | Normal   |
| <a href="#">Add new item</a>        |             |          |

### 6.4. Sub-Project Tabs

Since the main page is designed to provide overall project information, unfiltered by Phase or Module groupings, tabs are added to your Home Page to facilitate access to a select portion of the project. Tabs will be created when your Share Point site is established and will reflect the product groupings that were included in the Client contract.



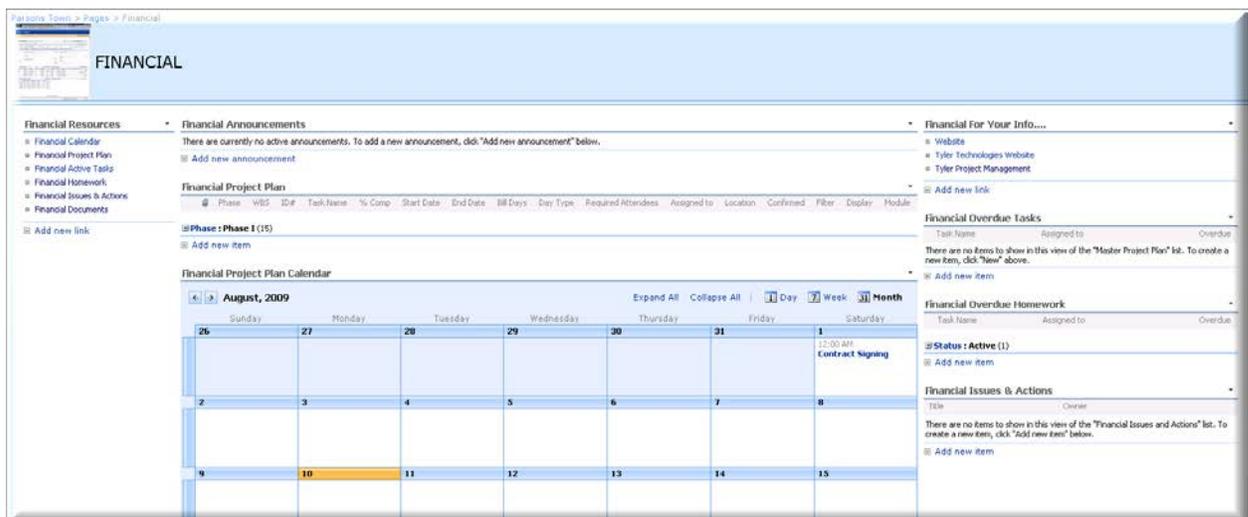
By selecting each of the available tabs, you will be taken to a new page, devoted solely to elements related to the Project grouping. More information on these tabs will follow in the next section.

## 7. Navigating on the Sub-Project Pages

As mentioned in Section 3.4, the number of Sub-Project Pages that are available is dependent on what module groupings were purchased as part of the contract. Since all Sub-Project pages work almost identically, we have used the Financial sub-project page as an example.

### 7.1. Financial Sub-Project Home Page

The basic structure of the Sub-Project Home Pages is intended to remain as consistent with the Main Project Home Page as possible. At the same time, the goal is to make it easy to find only the information that the people involved in the Financials project are interested in.



### 7.1.1. Financial Left Navigation List

The Left Navigation List provides you with easy access to core Financials project management links during the project. The following page provides detailed descriptions of each selection option.



1. FINANCIAL CALENDAR – This link takes you to a calendar of all Financial activities designated for calendar display. Other key project milestones may also be included on this calendar if they are of relevance to the Financials project.

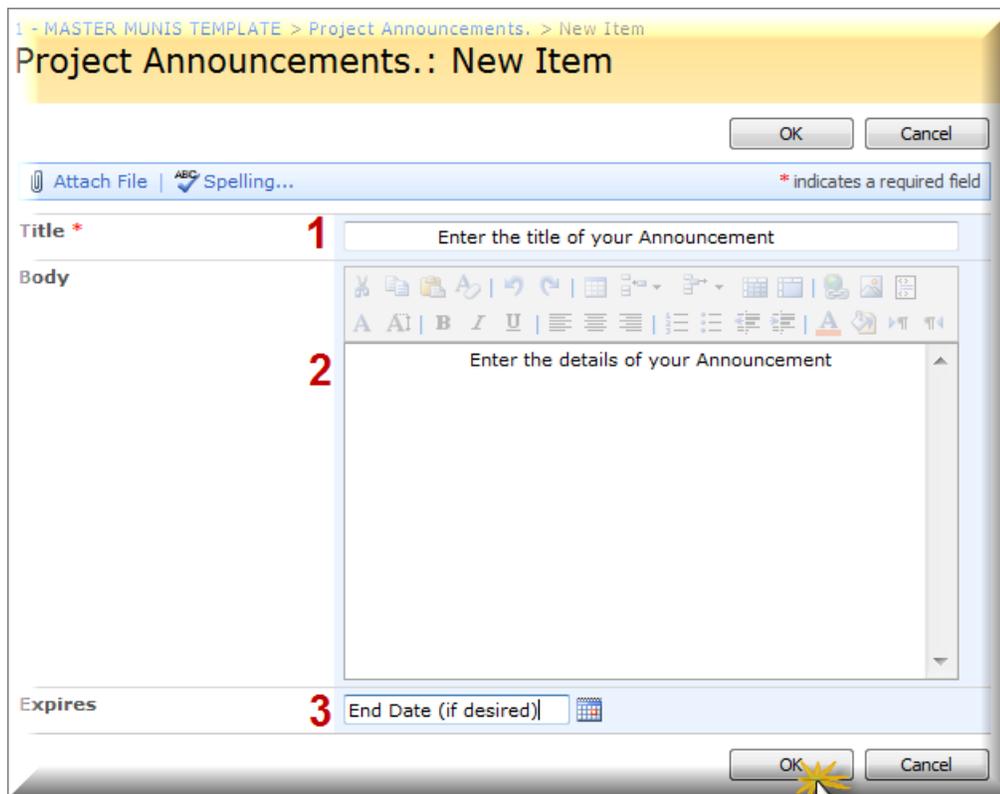
2. FINANCIAL PROJECT PLAN – This link takes you to a filtered version of the Master Project Plan displaying only Project activities that are part of the Financial plan. Any changes made to these items from this display automatically update the Master Project Plan.

- 3. FINANCIAL ACTIVE TASKS - This link takes you to a filtered version of the Master Project Task List. All tasks with the status of less than 100% and have the filter equal to “FIN” are included.
- 4. FINANCIAL HOMEWORK – This link takes you to a filtered version of the Master Project Homework List. All homework assignments with the status of less than 100% and have the filter equal to “FIN” are included.
- 5. FINANCIAL ISSUES & ACTIONS – This link takes you to a filtered subset of the Master Issues & Actions list.
- 6. FINANCIAL DOCUMENTS – This link takes you to a repository for any documents relevant to the Financial Project.

### 7.1.2. Financial Central Viewing Pane

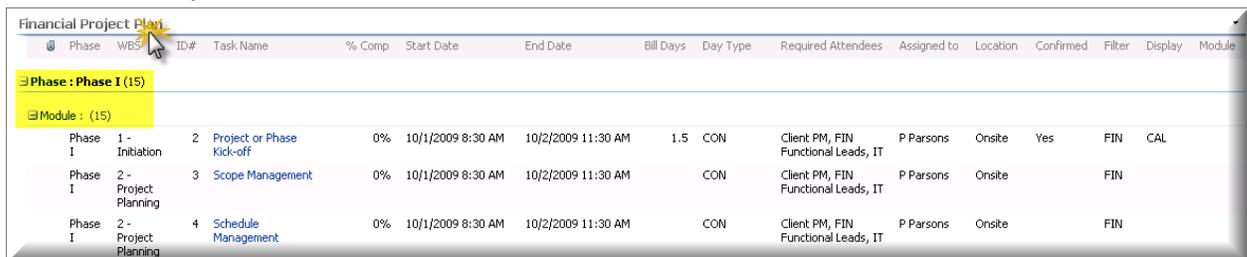
### 7.1.3. Financial Project Announcements

This Web Part area should be used for all Financial Project-related announcements and Staff should be encouraged to review this area regularly. Simply click “Add new announcement” to access the entry screen.



#### 7.1.4. Financial Project Plan

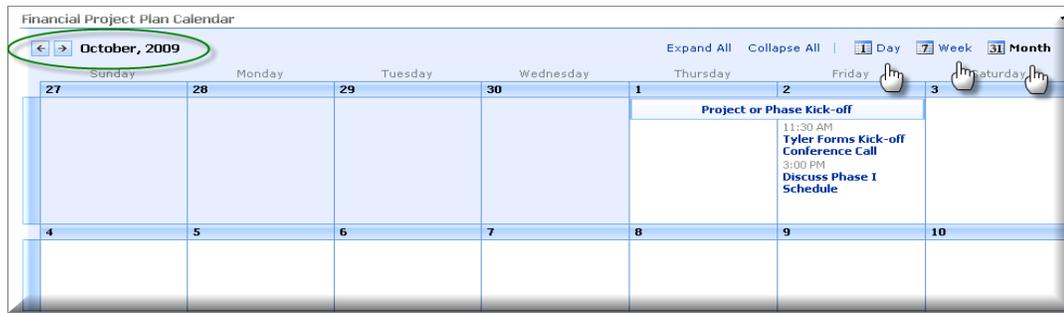
The Financial Project Plan Web Part is meant to provide a filtered view of project activities. Instead of showing activities unrelated to the Financials Implementation, this view narrows the information and finds only the items with the word “FIN” or “ALL” in the Filter field. By clicking on the Title Bar, as indicated below, you are redirected to a full screen view of the plan. Also, please note the highlighted grouping options below that allow you to see activities by Phase and by specific module. Any changes made to the Financial Project Plan here will make changes to the Master Project Plan as well.



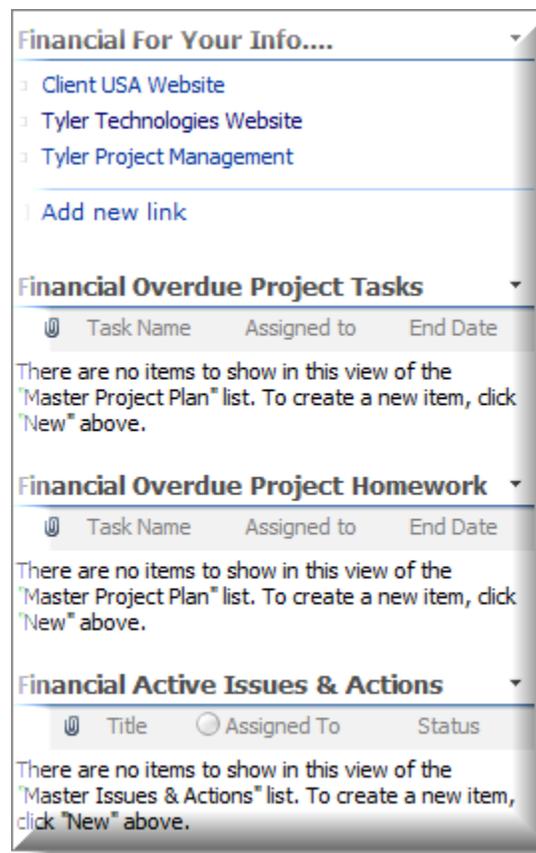
| Phase   | WBS# | ID# | Task Name                 | % Comp | Start Date        | End Date           | Bill Days | Day Type | Required Attendees                  | Assigned to | Location | Confirmed | Filter | Display | Module |
|---------|------|-----|---------------------------|--------|-------------------|--------------------|-----------|----------|-------------------------------------|-------------|----------|-----------|--------|---------|--------|
| Phase I | 1 -  | 2   | Project or Phase Kick-off | 0%     | 10/1/2009 8:30 AM | 10/2/2009 11:30 AM | 1.5       | CON      | Client PM, FIN Functional Leads, IT | P Parsons   | Onsite   | Yes       | FIN    | CAL     |        |
| Phase I | 2 -  | 3   | Scope Management          | 0%     | 10/1/2009 8:30 AM | 10/2/2009 11:30 AM |           | CON      | Client PM, FIN Functional Leads, IT | P Parsons   | Onsite   |           | FIN    |         |        |
| Phase I | 2 -  | 4   | Schedule Management       | 0%     | 10/1/2009 8:30 AM | 10/2/2009 11:30 AM |           | CON      | Client PM, FIN Functional Leads, IT | P Parsons   | Onsite   |           | FIN    |         |        |

#### 7.1.5. Financial Project Plan Calendar

The Financial Project Plan Calendar Web Part is meant to provide a filtered selection of project activities in a Calendar view. Not all activities belong on a calendar, so only those that have a Display field equal to CAL or ALL will show here. For instance, it is important for Staff to know that there is General Ledger training on a particular date but confusing for them to look on the calendar and see homework assignments spanning weeks. The calendar view should be for scheduled events or milestones only. Any changes made to this calendar will change the Master Project Plan Calendar as well. The view is available by day, week or month, with the level of detail decreasing as you move to longer periods of time. Navigating from one month to the next is easily achieved through the buttons shown below.



### 7.1.6. Financial Right Viewing Pane



#### 7.1.7. Financial For Your Info....

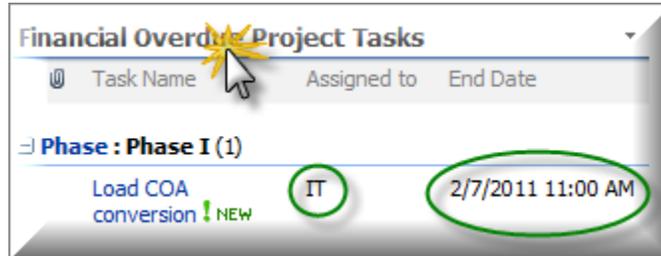
This Web Part allows you to post links to frequently used Financials specific Websites. When you first access your Share Point site, Tyler has already populated this section with several known sites of interest. You may continue to add links as you wish by clicking:



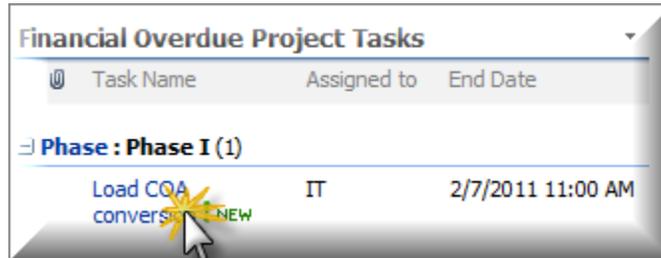
#### 7.1.8. Financial Overdue Tasks

This Web Part allows the Staff involved in the Financials project to immediately view all overdue Financial Project Tasks directly from Financials Home Page. This information includes all tasks from all phases but only for Financial

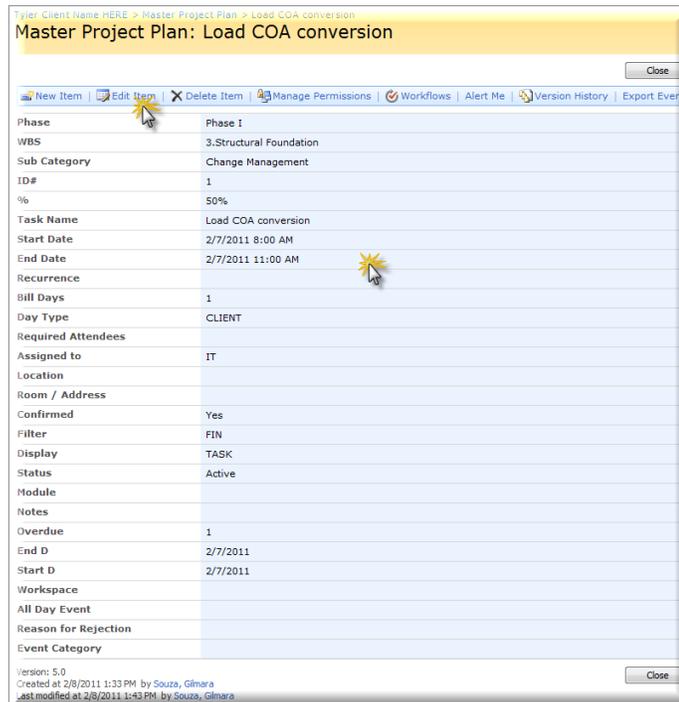
modules. Basic information is provided, including who the owner of the task is, so follow up can be achieved easily. The number of days that the task is overdue is also indicated. Clicking on the Title Bar will take you to a more detailed view of all Overdue Financial Tasks. Keep in mind that all tasks are listed on the Project Plan and this is simply a linked view that allows editing of the plan in a different way.



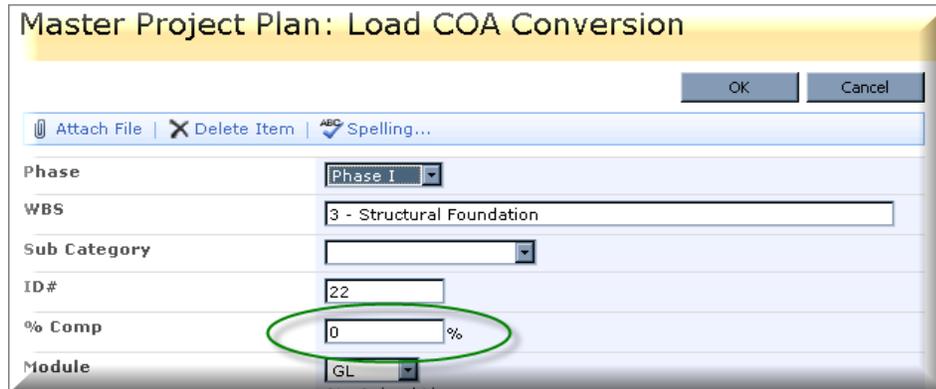
Often this list provides the Client PM or Financials Functional Lead with an opportunity to find tasks that are actually completed, but have not been marked as complete on the Project plan. You may click directly on the task to edit it and make any changes, including marking it as complete.



The following screen opens. Click Edit Item to update the information.



If changing the completion status, change the % Comp field to reflect the actual progress.



Master Project Plan: Load COA Conversion

OK Cancel

Attach File | Delete Item | Spelling...

Phase: Phase I

WBS: 3 - Structural Foundation

Sub Category:

ID#: 22

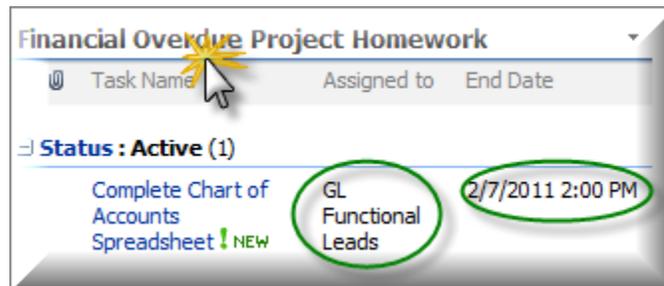
% Comp: 0 %

Module: GL

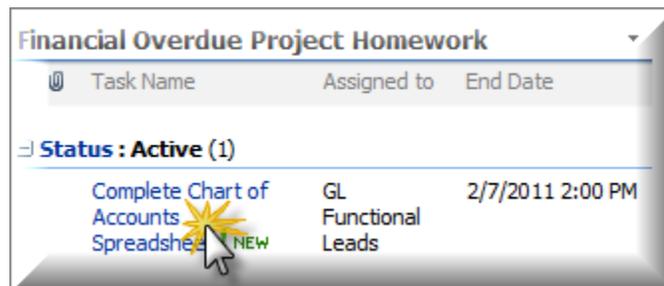
Once the % Comp is 100%, the task will no longer show in the Financials Overdue Project Tasks list.

### 7.1.9. Master Overdue Homework

This Web Part provides quick notification of any overdue Financials Homework, across all phases and Financial modules, with the same capabilities for editing that are available in Financial Overdue Project Tasks, above. Keep in mind that all homework is listed on the Project Plan and this is simply a linked view that allows editing of the plan in a different way.



Regular monitoring of this information by the Financial Project Team will be critical to ensuring that scheduled training, conversion validation and other key tasks may proceed as scheduled since many of them are dependent on homework assignments timely completion. Often this list provides the Client PM and Functional Leads with an opportunity to find tasks that are actually completed, but have not been marked as complete on the Project plan. You may click directly on the task to edit it and make any changes, including marking it as complete.



The following screen opens. Click Edit Item to update the information.

Master Project Plan: Complete Chart of Accounts Spreadsheet

Close

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Manage Permissions](#) | [Alert Me](#)

|                    |  |
|--------------------|--|
| Phase              | Phase I                                |
| WBS                | 3 - Structural Foundation              |
| Sub Category       |  |
| ID#                | 21                                     |
| % Comp             | 0%                                     |
| Module             | GL                                     |
| Task Name          | Complete Chart of Accounts Spreadsheet |
| Start Date         | 8/2/2009 12:00 AM                      |
| End Date           | 8/10/2009 12:00 AM                     |
| Day Type           | HOMEWORK                               |
| Bill Days          |  |
| Filter             | FIN                                    |
| Required Attendees |  |
| Assigned to        | GL Functional Leads                    |
| Location           |  |
| Room/Address       |  |
| Display            | TASK                                   |
| Confirmed          | Yes                                    |

If changing the completion status, change the % Comp field to reflect the actual progress.

Master Project Plan: Complete Chart of Accounts Spreadsheet

OK Cancel

[Attach File](#) | [Delete Item](#) | [Spelling...](#)

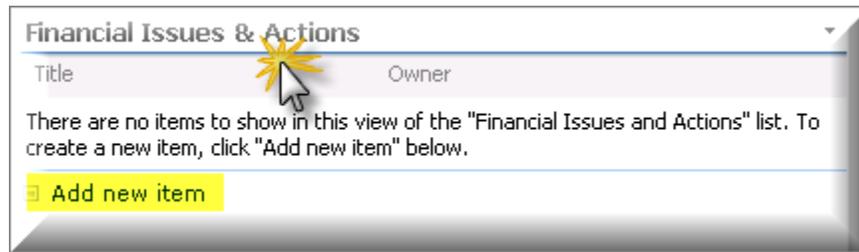
|              |                           |
|--------------|---------------------------|
| Phase        | Phase I                   |
| WBS          | 3 - Structural Foundation |
| Sub Category |                           |
| ID#          | 21                        |
| % Comp       | 0 %                       |
| Module       | GL                        |

Once the % Comp is 100%, the homework assignment will no longer show in the Financial Overdue Homework view.

#### 7.1.10. Financial Issues & Actions

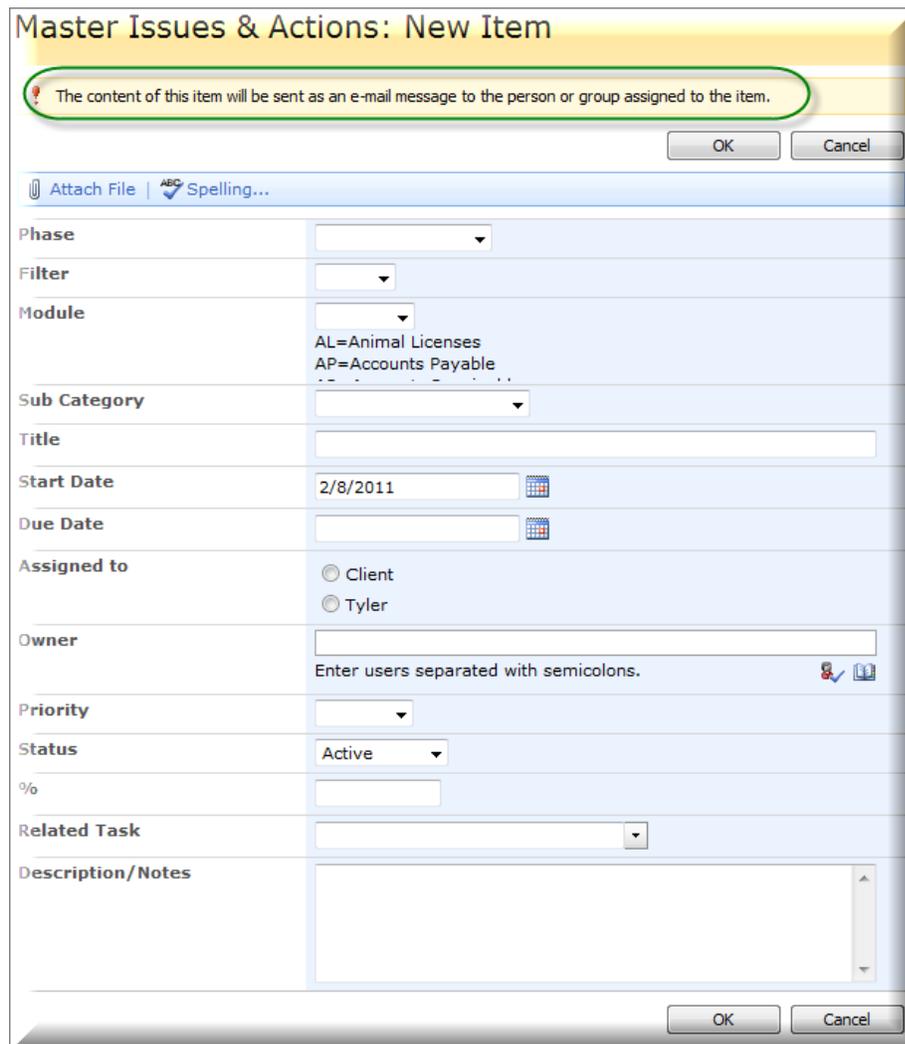
This Web Part is intended to provide a place to track issues and resulting actions and is not connected to any other Project Plan view. Adding items to this list will roll up to the Master List.

When adding new issues to this list, simply click on "Add new item".



The following screen will open. Please note that the once set up to do so, the content of this new Issue will also be emailed to the assigned Issue/Action Owner. By clicking on “Add new item”, you are automatically put into the edit mode. Fill out the fields as appropriate on this screen. Whenever possible, please take advantage of the opportunity to select Related Issues from those already entered in this list and to use the paperclip function to add a screen print or further documentation of the issue.

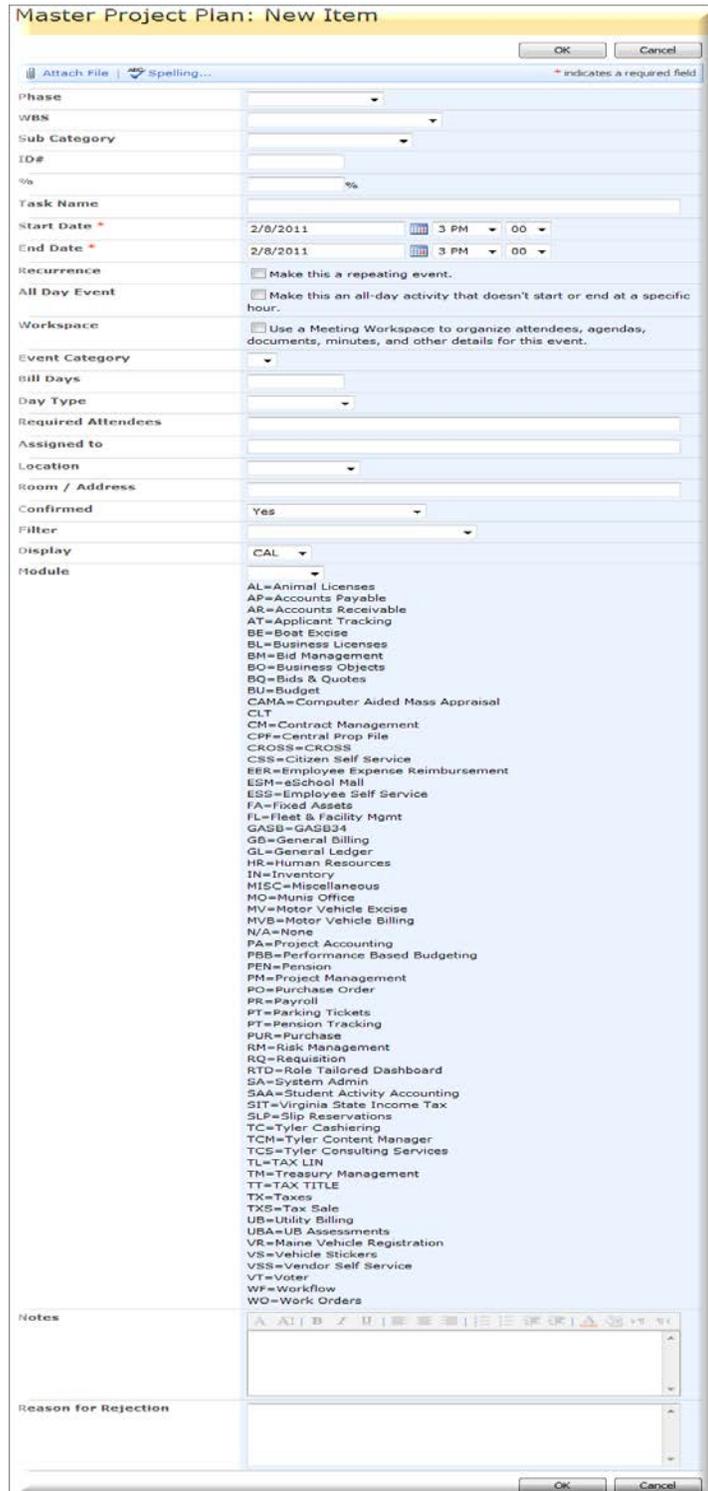
The Client Project Manager, Financial Functional Leads, and Tyler Financial Implementation staff should regularly enter items, and monitor and complete them as is appropriate.



## 8. Basic Guide to Field Definitions

### 8.1. Master Project Plan Detail View

The following is a snapshot of the full New Item screen.



**Master Project Plan: New Item**

Attach File | Spelling... \* indicates a required field

Phase: [Dropdown]

WBS: [Dropdown]

Sub Category: [Dropdown]

ID#: [Text]

%: [Text]

Task Name: [Text]

Start Date \*: 2/8/2011 3 PM 00

End Date \*: 2/8/2011 3 PM 00

Recurrence:  Make this a repeating event.

All Day Event:  Make this an all-day activity that doesn't start or end at a specific hour.

Workspace:  Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

Event Category: [Dropdown]

Bill Days: [Text]

Day Type: [Dropdown]

Required Attendees: [Text]

Assigned to: [Text]

Location: [Dropdown]

Room / Address: [Text]

Confirmed: Yes [Dropdown]

Filter: [Dropdown]

Display: CAL [Dropdown]

Module: [Dropdown]

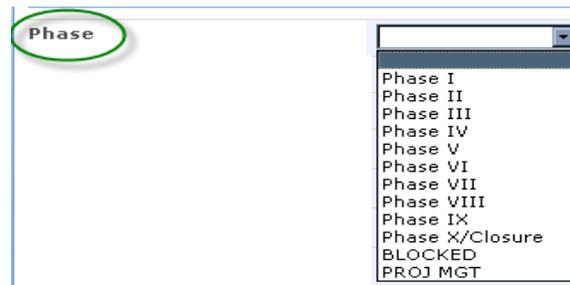
- AL=Animal Licenses
- AP=Accounts Payable
- AR=Accounts Receivable
- AT=Applicant Tracking
- BE=Boat Excise
- BL=Business Licenses
- BH=Bid Management
- BO=Business Objects
- BQ=Bids & Quotes
- BU=Budget
- CAMA=Computer Aided Mass Appraisal
- CLT
- CM=Contract Management
- CPF=Central Prop File
- CROSS=CROSS
- CSS=Citizen Self Service
- EER=Employee Expense Reimbursement
- ESM=eSchool Mail
- ESS=Employee Self Service
- FA=Fixed Assets
- FL=Fleet & Facility Mgmt
- GASB=GASB34
- GB=General Billing
- GL=General Ledger
- HR=Human Resources
- IN=Inventory
- MISC=Miscellaneous
- MO=Munis Office
- MV=Motor Vehicle Excise
- MVB=Motor Vehicle Billing
- N/A=None
- PA=Project Accounting
- PBS=Performance Based Budgeting
- PEN=Pension
- PM=Project Management
- PO=Purchase Order
- PS=Payroll
- PT=Parking Tickets
- PT=Pension Tracking
- PUR=Purchase
- RM=Risk Management
- RQ=Requisition
- RTD=Role Tailored Dashboard
- SA=System Admin
- SAA=Student Activity Accounting
- SIT=Virginia State Income Tax
- SLP=Slip Reservations
- TC=Tyler Cashiering
- TCM=Tyler Content Manager
- TCS=Tyler Consulting Services
- TL=TAX LIN
- TM=Treasury Management
- TT=TAX TITLE
- TX=Taxes
- TXS=Tax Sale
- UB=Utility Billing
- UBA=UB Assessments
- VR=Maine Vehicle Registration
- VS=Vehicle Stickers
- VSS=Vendor Self Service
- VT=Voter
- WF=Workflow
- WO=Work Orders

Notes: [Rich Text Editor]

Reason for Rejection: [Text]

### 8.1.1.Phase

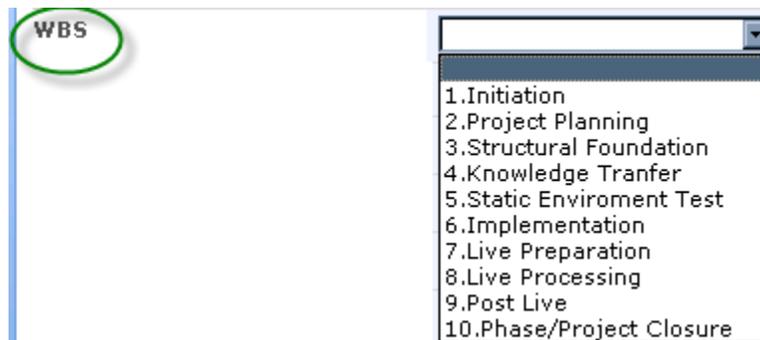
The Phase field provides a means of sorting and filtering information throughout the project. For instance, Core Financials are most likely in Phase I, whereas Work Orders and Fleet & Facility Management may be in Phase II. They both will display on the Financials Tab but can now be separated accordingly by using the Phase field.



- **Phase I, II, III, IV, VI, VII, VIII, IX, Closure, etc.:**
- **BLOCKED Phase:**  
BLOCKED is used in the phase field to identify the days that the Client or Tyler is not available for training or any other implementation activity.  
*Example:* Holidays, Internal Meetings, Budget Prep, Tyler PM Mtg, etc. The Tyler PM must make sure to set DISPLAY to CAL so it shows on the Calendar.
- **Proj Mgt Phase:**  
Use Proj Mgt in the phase field to identify meetings and activities related to Project Management.  
*Example:* Bi-Weekly Status Call, Steering Committee Meeting, etc.

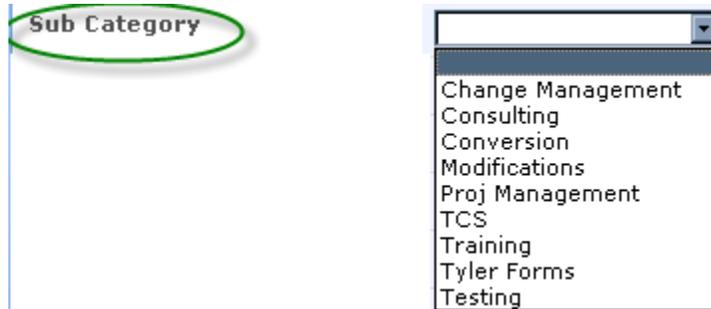
### 8.1.2.WBS

Because the standard WBS that is produced in MS Project will not sort properly in SharePoint, it was necessary to create a “header” listing of WBS steps and add an ID# field for sorting purposes. The choices for WBS are:



### 8.1.3.Sub Category

This field is designed so that groups of common processes can be filtered or sorted for easy viewing. For instance, Conversion activities take place across many modules and phases. This field provides the opportunity to filter all Conversion activities and view them in one concise place.



### 8.1.4. ID#

The ID# field is designed solely to keep the project plan in the appropriate order within the WBS outline. As items are added, it will be necessary for the Tyler Project Manager to renumber the plan.



### 8.1.5. %

The default value is 0% and the Client and Tyler Project Manager should update the percentage of completion as each task they own is worked on and completed. This field drives several filters and is key in identifying past due tasks and homework.



### 8.1.6.Task Name

Description of the task name or service deliverable will be entered in this field.



### 8.1.7.Start Date + Time

This field contains the start date and time of the task. When the Tyler PM schedules a meeting or training session, they must make sure to use the actual time for the session to begin so that it displays accurately on the calendar.

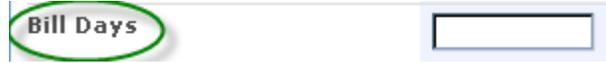


### 8.1.8.End Date + Time

This field contains the end date (or due date) and time of the task. When the Tyler PM schedules a meeting or training session, they must make sure to use the actual time for the session to end. This field is also critical to several filters and is part of identifying past due tasks and homework.

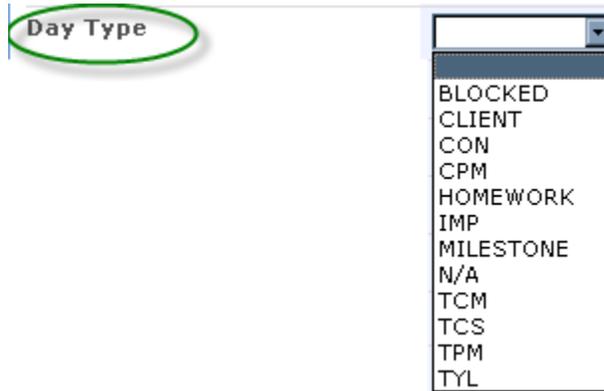
### 8.1.9. Bill Days

The Tyler Project Manager will enter the number of billable days associated with the task per the contract. They will not enter days for services that are not billed by the day. This column provides totals by various selection criteria for project budget reconciliation.



### 8.1.10. Day Type

The Tyler Project Manager uses this field to define the type of day being used in associated with the activity defined in the Task Name field.



The following are the definitions of the Day Type selections:

- BLOCKED – Used to indicate dates that are blocked from scheduling
- CLIENT - Client activity (general – no number should be in the Billable Days field)
- CON - Consulting (Standard Implementation Consulting Day – there should be a number in the Billable Days field)
- CPM - Client Project Management (Client PM Task– no number should be in the Billable Days field)
- HOMEWORK – Identifies Homework type of tasks
- IMP – Implementation (Standard Implementation Training Day – there should be a number in the Billable Days field unless the total number of days is rolled up under a larger item)
- MILESTONE – Identifies Project Milestones
- N/A – Day Type has no significance to the Item
- TCM - Tyler Content Manager (TCM Days – billable days determined by contract)
- TCS - Tyler Consulting Solutions (no number should be in the Billable Days field since this service is not billed on a per day basis)
- TPM - Tyler Project Management (Tyler PM Task– no number should be in the Billable Days field unless contract contains billable PM services by day)
- TYL - Tyler (general - no number should be in the Billable Days field)

This field is also critical in several filters so selecting the correct day type is important in correct information display.

### 8.1.11. Required Attendees

This field contains the name of the people (or their roles) who should attend the session. While the Tyler PM will attempt to be as specific as possible, ultimately the Client has the knowledge of the key people who have process expertise or require training.



The screenshot shows a form field with the label "Required Attendees" circled in green. To the right of the label is a long, empty rectangular text input box.

### 8.1.12. Assigned to

This field contains the name of the person responsible for either delivering the Tyler service or the Client who owns completion of the task.



The screenshot shows a form field with the label "Assigned to" circled in green. To the right of the label is a long, empty rectangular text input box.

### 8.1.13. Location

Use the drop down menu to define the location for the task deliverable.



The screenshot shows a form field with the label "Location" circled in green. To the right of the label is a dropdown menu with a blue header and a white body. The dropdown menu is open, showing four options: "Onsite", "GoToMeeting", "TeleConf", and "Other".

### 8.1.14. Room/Address

Once the Tyler PM enters project items or submits a schedule for approval, the Client Project Manager can use this field to provide detailed information as to the location of training. This also provides the Client PM with the ability to control the scheduling of facilities.



The screenshot shows a form field with the label "Room / Address" circled in green. To the right of the label is a long, empty rectangular text input box.

### 8.1.15. Confirmed

This field indicates the status of the schedule showing whether the day has been submitted for approval, approved or rejected by the client. When "Submitted for Approval" is selected, the item is displayed on the main project page making it easily accessible for the Client PM to respond to. When "Rejected", if Project Managers set up an alert, they will receive notification when a schedule is rejected.



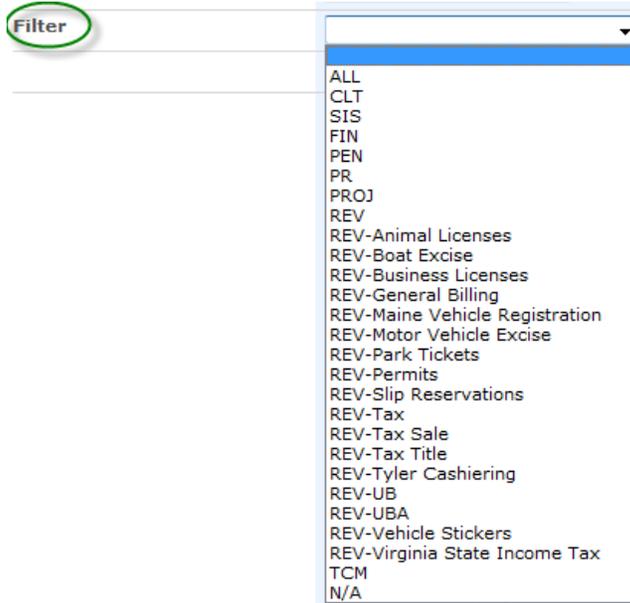
The screenshot shows a form field with the label "Confirmed" circled in green. To the right of the label is a dropdown menu with a blue header and a white body. The dropdown menu is open, showing four options: "Yes", "No", "Submitted for Approval", and "Rejected".

**PLEASE NOTE:** The item submitted for approval won't be part of the Project Plan or the Calendar until the task/item is confirmed as Yes.

### 8.1.16. Filter

The filter allows for the system to determine what product grouping the task information should be consolidated by. There are individual tabs at the top of the main page, links to homework, calendars, etc. all that look at the Filter field.

Choose from the drop down menu:



- ALL = Display on ALL Calendars or Task Lists
- CLT = Cole, Layer, Trumble
- Tyler SIS (Previous named EDU = Tyler Education Solution)\*
- FIN = Financials
- PEN = Pension
- PR = Payroll/HR
- PROJ = Project (not module specific)
- REV = Revenue ( and Products)
- TCM = Tyler Content Manager\*

*\*Not part of the standard MUNIS Template Views*

### 8.1.17. Display

The purpose of this field is to identify where the task is viewed. If you select CAL, the task will show on the Master Calendar, and the other appropriate calendar(s) as defined in the Filter field. If you select TASK, it will not show on the calendar, but will be included in the various Task lists.



**8.1.18. Module**

This field allows for sorting and grouping information by module. This is especially helpful in the Homework listing, as it allows users to easily narrow their area of involvement.

**8.1.18.1. MUNIS**



The screenshot shows a web interface with a dropdown menu labeled "Module" circled in green. The dropdown is open, displaying a list of modules. The list includes:

- AL=Animal Licenses
- AP=Accounts Payable
- AR=Accounts Receivable
- AT=Applicant Tracking
- BL=Business Licenses
- BM=Bid Management
- BO=Business Objects
- BQ=Bids & Quotes
- BU=Budget
- CLT
- CM=Contract Management
- CPF=Central Prop File
- CSS=Citizen Self Service
- EER=Employee Expense Reimbursement
- ESM=eSchool Mail
- ESS=Employee Self Service
- FA=Fixed Assets
- FL=Fleet & Facility Mgmt
- GASB=GASB34
- GB=General Billing
- GL=General Ledger
- HR=Human Resources
- IN=Inventory
- MISC=Miscellaneous
- MO=Munis Office
- MVB=Motor Vehicle Billing
- PA=Project Accounting
- PBB=Performance Based Budgeting
- PEN=Pension
- PM=Project Management
- PO=Purchase Order
- PR=Payroll
- PT=Parking Tickets
- PT=Pension Tracking
- PUR=Purchase
- RM=Risk Management
- RQ=Requisition
- RTD=Role Tailored Dashboard
- SA=System Admin
- SAA=Student Activity Accounting
- SLP=Slip Reservations
- TC=Tyler Cashiering
- TCM=Tyler Content Manager
- TCS=Tyler Consulting Services
- TL=TAX LIN
- TM=Treasury Management
- TT=TAX TITLE
- TX=Taxes
- TXS=Tax Sale
- UB=Utility Billing
- UBA=UB Assessments
- VSS=Vendor Self Service
- VT=Voter
- WF=Workflow
- WO=Work Orders

**8.1.18.2. Tyler SIS\***

- System Administrator
- Staff Administrator
- Security Administrator
- School Administrator
- Customization & Data Management
- Office Personnel
- Counselor Functions
- Teacher Functions
- Principal & Assistant Principal Functions
- Health & Immunization
- Ad Hoc Reporting
- Scheduling
- Parent Portal

\* Previous named Education Solutions – Some SharePoint sites will refer to it with abbreviation EDU on the Tab, Views, and columns drop downs.

**8.1.18.3. PENSION\***

- Members
- Control Posting
- Interest
- Service
- Refunds
- Benefit Calculus
- Buybacks
- QDROs
- Retirees
- Payroll
- Cola
- Reports
- 1099s

*\*Not part of the standard MUNIS Template Views*

**8.1.19. Notes**

The field will be used for general notes. When the Client PM rejects a schedule, the reason for rejection should be entered here as well.

**8.1.20. Workspace**

Should not be used.

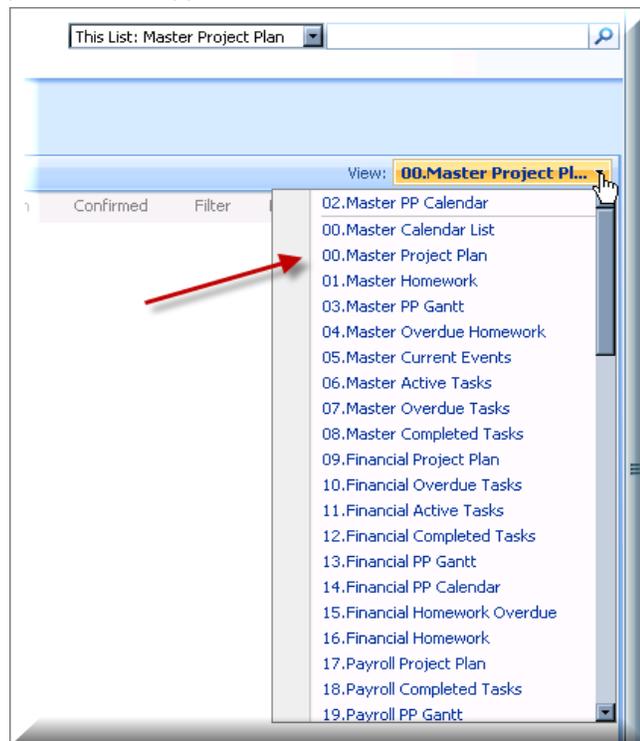
**8.1.21. All Day Event**  
Should not be used.

## 9. View Options for Information Management

The Project SharePoint site contains a significant amount of information that can be beneficial in managing the project successfully. In order to extract the most useful types of information, Tyler has created a large number of “ready-made” views. The yellow dropdown View Box is available from any list and can be found in the upper right section of the screen. In order to access views, simply click on the View Box as indicated below:



The following scrolling option box will appear:



Since you can access this dropdown box from any other list, it is also an easy way to navigate throughout the Site without having to go back to the main page as a starting point.

### 9.1. Master Project Views

The following views access information based on the Main Project Plan:

#### 9.1.1. Master PP Calendar

Simply provides a quick link to the Master Project Plan calendar. Shows Project Plan entries where the Display is equal to CAL and the Confirmed is equal to Yes.

#### **9.1.2.Master Calendar List**

Displays Master Project Plan calendar items in a list view grouped by Phase and sorted by Filter then by ID# ascendant.

.

#### **9.1.3.Master Project Plan**

Shows all of the items from the Project Plan displayed in a list grouped by Phase and sorted by Filter then by ID# ascendant.

#### **9.1.4.Master Homework**

This view shows all the items from the Master Project Plan where the Day Type is equal to HOMEWORK, and the Display is equal to TASK.

#### **9.1.5.Master PP Gantt**

Shows all of the items on the Project Plan displayed on a simplified Gantt Chart and sorted by Filter then by ID# ascendant.

#### **9.1.6.Master Overdue Homework**

This view shows the tasks where the Display is equal TASK, the End Date is less than or equal to today and the percentage is less than 100%. The person assigned to the Homework and the number of days the task is overdue will also be displayed.

#### **9.1.7.Master Active Tasks**

This view shows the tasks where Display is equal to TASK and the Start Date is equal or less than "Today" and the uncompleted with the percentage less than 100%.

#### **9.1.8.Master Completed Tasks**

This view shows the tasks where the Display is equal to TASK and the percentage is equal 100%.

#### **9.1.9.Homework All**

This view shows all the items from the Master Project Plan where the Day Type is equal to HOMEWORK, and the Display is equal to TASK.

#### **9.1.10. Homework Overdue**

This view shows all the items from the Master Project Plan where the Day Type is equal to HOMEWORK and the Display is equal to TASK and the Due Date is equal to or before today's date.

#### **9.1.11. Phase I, Phase II, Phase III, Phase BLOCKED, Phase Proj Mgt -**

Shows all items grouped by Phases and sorted by ID#.

#### 9.1.12. Confirmed Schedule

This view shows the approved schedule where Confirmed = Yes and the Start Date is > TODAY.

#### 9.1.13. Count Phase I, Count Phase II, Count Phase III...-

These views show the totals of days in each phase using some of the day type descriptions in the DAY TYPE column. It is sorted by Start Date and WBS, grouped by Filter and Day Type. The day types included in this view are:

- CON – Consulting days
- IMP – Implementation Days
- TPM – Tyler Project Management
- TCS – Tyler Consulting Days

#### 9.1.14. Schedule Approval

This view shows all the items that need to be reviewed by the site for scheduling to take place. It is filtered by the column CONFIRMED where it is equal to “Submitted for Approval”. This view provides the information that is displayed on the main page of the site.

***The items submitted for approval will only be shown in the Master Project Plan and the Calendar once the items are approved =YES.***

#### 9.1.15. Schedule Review

This view was made specifically for the client PM to be able see all the items submitted for approval and items in the future that have already been approved. It is displayed in the “Edit in Datasheet” option for ease of entry. This view shows all the items where Confirmed is equal to Yes or Submitted for Approval, Start Date is greater than or equal to [Today] and the display is equal to CAL.

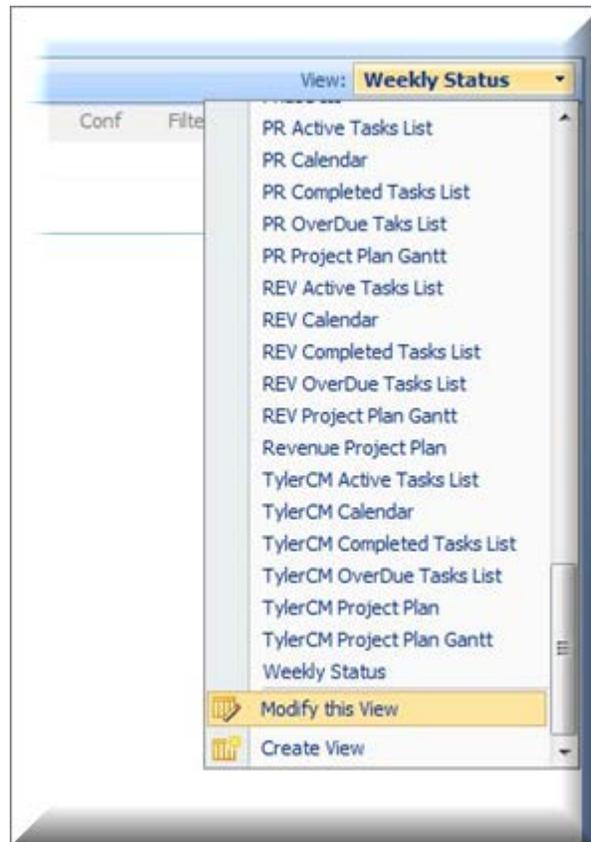
#### 9.1.16. Weekly Status

This view is used to list all the tasks that occurred during a particular period from the Master Project Plan. The Tyler PM may insert this material in their Status Reports to show the detail of work for a given period. Since the reporting periods change, it is necessary to modify the Start Date and the End Date of the View Selection Criteria to reflect the desired period.

***Select the view Weekly Status in the view box scroll down and click on Modify this View.***

#### 9.1.17. Current Status Review

This view is to help the Project Managers review tasks/items on the Master Project Plan that may be due or completed but have not been updated on the Project Plan. It is filtered by End Date is less than or equal to [Today], and Conf is equal to Yes and % Comp is less than 100.



---

## 9.2. Module Tab Views

Every Module has 8 filtered views. Example:

### 9.2.1. Financial PP Calendar

Shows all the Financial items in a calendar view. Display is equal to CAL, Filter is equal to FIN and ALL, and the Conf is equal to Yes.

### 9.2.2. Financial PP Gantt

Shows all the items where the Filter is equal to FIN in a simplified Gantt Chart view sorted by ID#.

### 9.2.3. Financial Project Plan

Show all the items where the Filter is equal to FIN and sorted by ID#.

### 9.2.4. Financial Overdue Tasks List

Shows all the Financial items that are overdue to the date. Filter is equal to FIN, Display is equal TASK, End Date is less than or equal to [today], % Completion is not equal to 100, Day Type is not equal to HOMEWORK, sorted by End Date, then ID#.

### 9.2.5. Financial Active Tasks List

Shows all the Financial items that are in progress. Filter is equal to FIN, Display is equal to TASK, Start Date is greater than 01/01/2009, % Completion is less than a 100 and the Day Type is not equal to HOMEWORK, sorted by End Date, then ID#..

### 9.2.6. Financial Completed Tasks List

Show all the Financial Tasks that are completed. Filter is equal to FIN, Display is equal to TASK, Start Date is greater than 01/01/2009, % Completion is equal a 100 and the Day Type is not equal to HOMEWORK, sorted by End Date, then ID#.

### 9.2.7. Financial Homework

Shows all the Financial items that the Day Type is equal to a HOMEWORK, Display is TASK, and the End Date is greater than 01/01/2009 (this makes sure that Homework doesn't go on the list until it has a DUE DATE).

### 9.2.8. Financial Homework Overdue

Shows all the Financial homework items where the Day Type is equal to HOMEWORK, Display is equal to TASK, End Date is less than or equal to [today], and the % Completion is not equal to 100, sorted by End Date, then ID#.

**9.2.9. Schedule Review for Approval Edit Mode**

This is to help the Client Project Manager approve tasks easily by working in the edit mode without having to click on every item. The view is sorted by Start Date and Phase. Filter is equal to Yes or Submitted for Approval, and Start Date is greater than or equal to Today, Display is equal to CAL.

**9.2.10. Rejected Schedule**

Sorted by Start Date, and Conf (confirmed) is equal to Rejected.

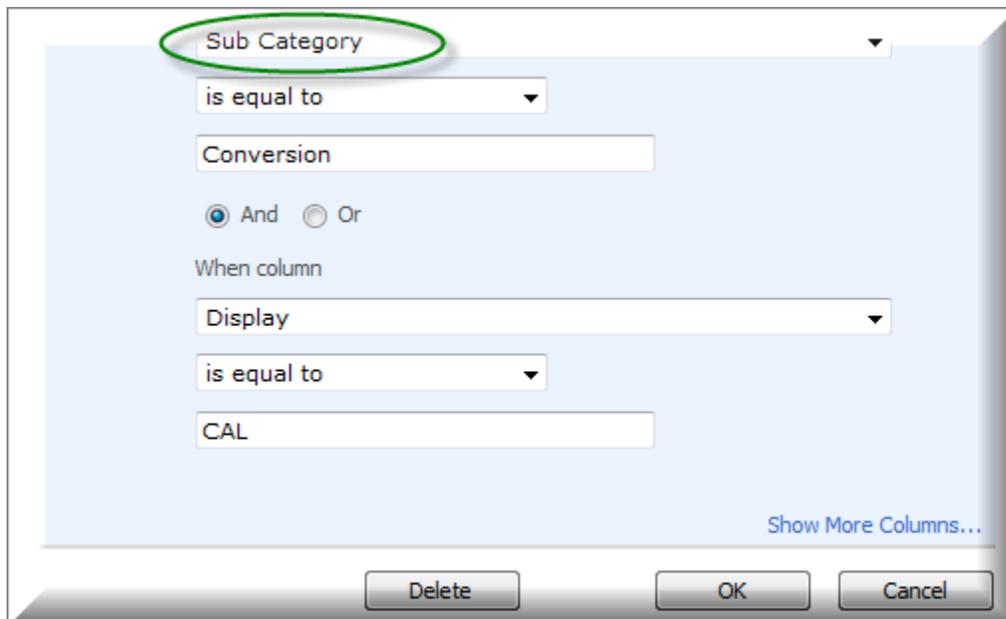
**9.2.11. Current Status Review**

Sorted by End Date, and where End Date is less than or equal to [today], Conf is equal to Yes, % (Completion) is less than 100. This helps the Project Manager to review if any tasks (all items) have been completed but not checked or it may need a correction.

**9.2.12. Using the Sub Category column**

This view will display in calendar view, filtered on:

- *TCS*
- *Consulting*
- *Training*
- *Tyler Forms*
- *Conversion*
- *Change Management*
- *Modifications*
- *Proj Management*



### 9.3. Revenue Specific Tab Views

Revenue Tab has more specifically views created to facilitate the management of the implementation process of the different products that follow under Revenue the purpose of the views are to filter the different modules and to provide the Project Manager of each module easy access and update of their project plan.



#### 9.3.1. Tax PP Calendar

Shows all the Tax items, Tax Sales and Tax Title and Filter is equal to REV-Tax/or REV-Tax Sale/or REV-Tax Title/or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to TT/or TL/or TX/or TSX sorted by default. View# 58

#### 9.3.2. Tax Project Plan

Shows all the Tax items, Tax Sales and Tax Title) and Filter is equal to REV-Tax/or REV-Tax Sale/or REV-Tax Title/ or ALL, and Module is equal to TT/or TL/or TX/or TSX, sorted by Filter and ascendant ID# columns, grouped by Phase and Module. View# 59

#### 9.3.3. Utility Billing PP Calendar

Shows all the Utility Billing items, UB and UBA and Filter is equal to REV-UB/or REV-UBA/or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to UB/or UBA sorted by default. View# 60

#### 9.3.4. Utility Billing Project Plan

Shows all the Utility Billing items, UB and UBA and Filter is equal to REV-UB/or REV-UBA/or ALL, and Module is equal to UB/or UBA, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View# 61

#### 9.3.5. Business Licenses PP Calendar

Shows all the Business Licenses items and Filter is equal to REV-Business Licenses /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to BL sorted by default. View# 62

#### 9.3.6. Business Licenses Project Plan

Shows all the Business Licenses items and Filter is equal to REV-Business Licenses/ or ALL, and Module is equal to BL, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View# 63

**9.3.7. Permits E Codes PP Calendar**

Shows all the Permits E Codes items and Filter is equal to REV-Permits /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to PI sorted by default. View# 64

**9.3.8. Permits E Codes Project Plan**

Shows all the Permits E Codes items and Filter is equal to REV-Permits/ or ALL, and Module is equal to PI, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View# 65

**9.3.9. Animal Licenses PP Calendar**

Shows all the Animal Licenses items and Filter is equal to REV- Animal Licenses /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to AL sorted by default. View#

**9.3.10. Animal Licenses Project Plan**

Shows all the Animal Licenses items and Filter is equal to REV- Animal Licenses / or ALL, and Module is equal to AL, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.11. Boat Excise PP Calendar**

Shows all the Boat Excise items and Filter is equal to REV- Boat Excise /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

**9.3.12. Boat Excise Project Plan**

Shows all the Boat Excise items and Filter is equal to REV- Boat Excise / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.13. REV-General Billing PP Calendar**

Shows all the REV-General Billing items and Filter is equal to REV-General Billing /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

**9.3.14. REV-General Billing Project Plan**

Shows all the REV-General Billing items and Filter is equal to REV-General Billing / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.15. Maine Vehicle Registration PP Calendar**

Shows all the Maine Vehicle Registration items and Filter is equal to REV- Maine Vehicle Registration /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **MVB** sorted by default. View#

**9.3.16. Maine Vehicle Registration Project Plan**

Shows all the Maine Vehicle Registration items and Filter is equal to REV- Maine Vehicle Registration / or ALL, and Module is equal to **MVB**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.17. Motor Vehicle Excise PP Calendar**

Shows all the Motor Vehicle Excise items and Filter is equal to REV-Motor Vehicle Excise /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

**9.3.18. Motor Vehicle Excise Project Plan**

Shows all the Motor Vehicle Excise items and Filter is equal to REV-Motor Vehicle Excise / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.19. Park Tickets PP Calendar**

Shows all the Park Tickets items and Filter is equal to REV-Park Tickets /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

**9.3.20. Park Tickets Project Plan**

Shows all the Park Tickets items and Filter is equal to REV-Park Tickets / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.21. Slip Reservations PP Calendar**

Shows all the Slip Reservation items and Filter is equal to REV-Slip Reservation/or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to SLP sorted by default. View#

**9.3.22. Slip Reservations Project Plan**

Shows all the Slip Reservation items and Filter is equal to REV-Slip Reservation/ or ALL, and Module is equal to SLP, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.23. Tyler Cashiering PP Calendar**

Shows all the Tyler Cashiering items and Filter is equal to REV -Tyler Cashiering /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to TC sorted by default. View#

**9.3.24. Tyler Cashiering Project Plan**

Shows all the Tyler Cashiering items and Filter is equal to REV-Tyler Cashiering / or ALL, and Module is equal to TC, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.25. Vehicle Stickers PP Calendar**

Shows all the Vehicle Stickers items and Filter is equal to REV-Vehicle Stickers /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

**9.3.26. Vehicle Stickers Project Plan**

Shows all the Vehicle Stickers items and Filter is equal to REV-Vehicle Stickers / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.3.27. Virginia State Income Tax PP Calendar**

Shows all the Virginia State Income Tax items and Filter is equal to REV- Virginia State Income Tax /or ALL; Display is equal CAL, Confirmed is equal to Yes, and Module is equal to **NONE** sorted by default. View#

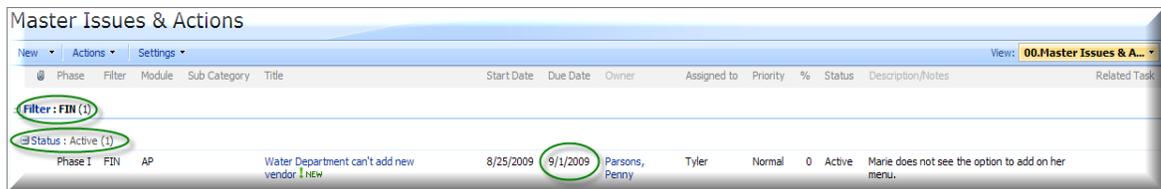
**9.3.28. Virginia State Income Tax Project Plan**

Shows all the Virginia State Income Tax items and Filter is equal to REV-Virginia State Income Tax / or ALL, and Module is equal to **NONE**, sorted by Filter and by ascendant ID# columns, grouped by Phase and Module. View#

**9.4. Master Issues & Actions Views**

**9.4.1. Master Issues & Actions**

Shows all items sorted ascending by Due Date, grouped by filter then by status.



**9.4.2. Master Active Issues & Actions**

Shows the items where the status is equal to Active, or Not Started or On Hold, sorted by ascending Due Date, grouped by Filter then by Status.

**9.4.3. Master Overdue Issues & Actions**

Shows the items where the Due Date is less or equal to Today, and the Status is Active, or On hold and the % completion is not equal to 100, sorted ascending by Due Date, grouped by Filter then by status.

**9.4.4. Financial/Revenue/Payroll/CLT Issues & Actions**

Shows all items related to their specific product, sorted ascending by Due Date, grouped by Phase then by Module.

**9.4.5. Financial/Revenue/Payroll/CLT Active Issues & Actions**

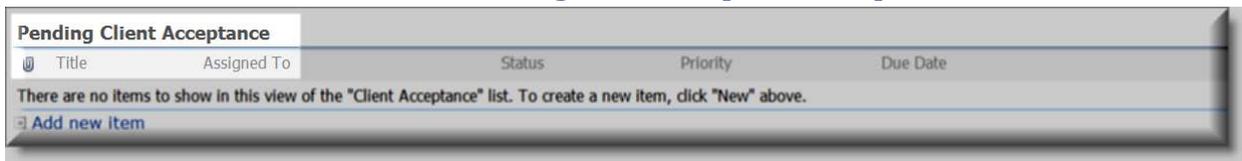
Shows all active items where Start Date is equal or less than today, Status is equal to Active, or On Hold, and the % Completion is not 100, and Filter is equal to Financial, or Payroll, or Revenue, or CLT sorted ascending by Due Date, grouped by Phase then by Module.

**9.4.6. Financial/Revenue/Payroll/CLT Overdue Issues & Actions**

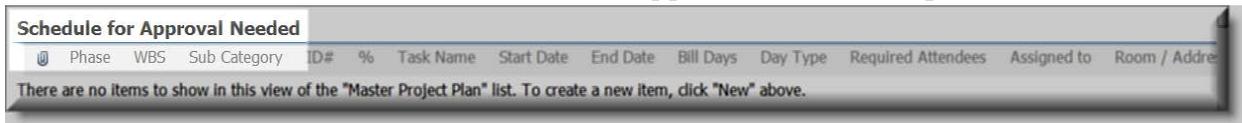
Shows all active items where the Due Date is equal or less than today, Status is equal to Active, or On Hold, and the % Completion is not 100, and Filter is equal to Financial, or Payroll, or Revenue, or CLT sorted ascending by Due Date, grouped by Phase then by Module.

**10. Checklist for Daily Share Point Project Management**

**10.1. Check and Process “Pending Client Acceptance” Requests**

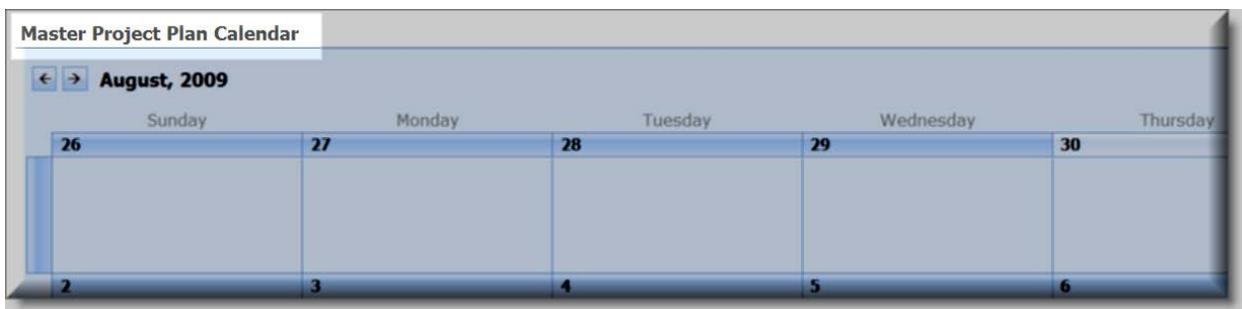


**10.2. Check and Process “Schedule for Approval Needed” Requests**



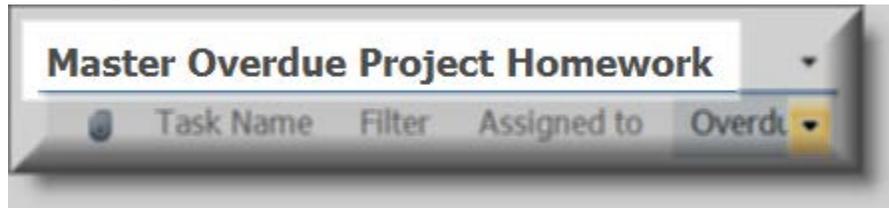
- Review dates, resources and training facilities to make sure there are no conflicts
- Change CONFIRMED field to appropriate response. If “NO” please enter the reason in the Notes field.
- Enter Room/Address where Session will take place.
- Communicate with Required Attendees to make sure they are prepared to attend.

**10.3. Review Calendars**

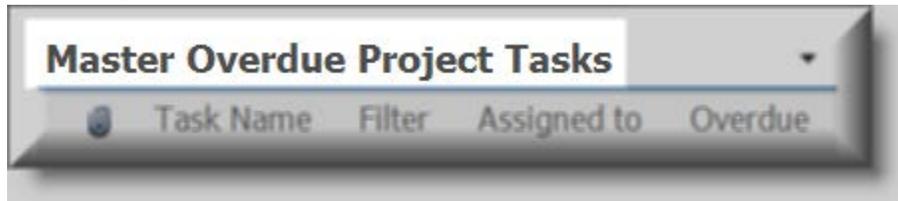


- Make sure training rooms are set up for the scheduled sessions
- Communicate with Required Attendees
- Review Agenda

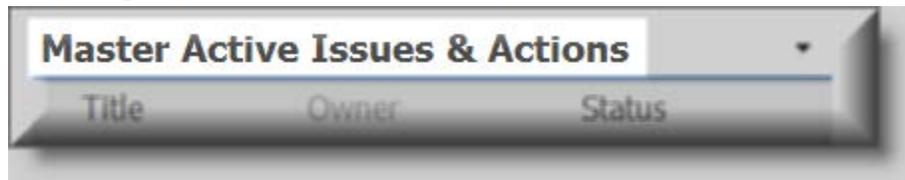
**10.4. Follow Up on Overdue Homework**



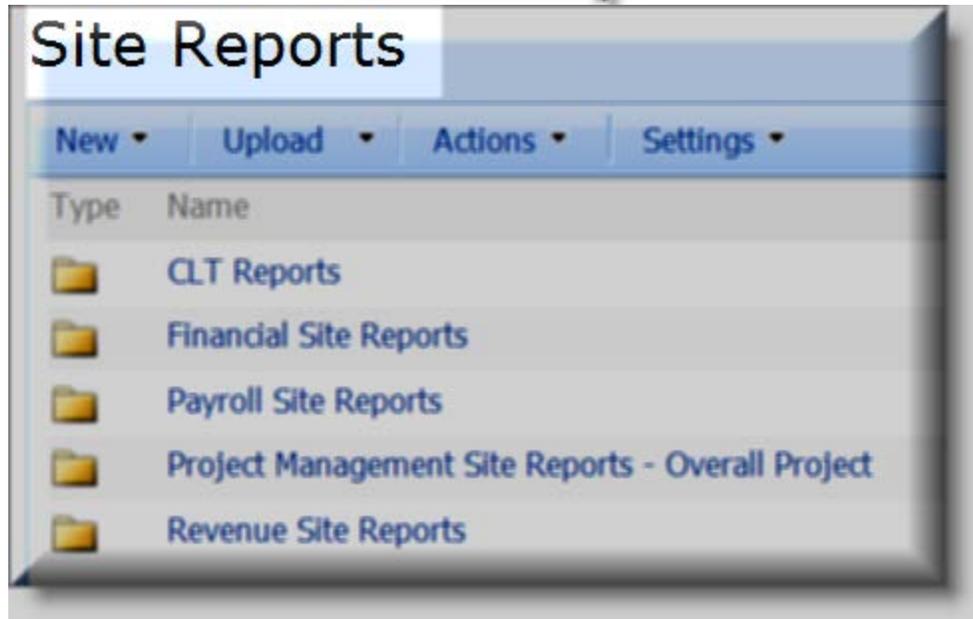
**10.5. Follow Up on Overdue Tasks**



**10.6. Follow Up on Issues & Action Items**



10.7. Review Site Reports



**10.8. Review Active Tasks and Active Homework on Sub-Project Pages**



**10.9. Update % Field to Indicate Progress on Tasks Assigned to Client Resources**

Master Project Plan

| Phase               | WBS          | Sub Category    | ID # | %  | Task Name                 | Start Date        | End Date          | Bill Days | Day Type  | Required Attendees | Assigned to | Location | Room / Address | Confirmed | Filter | Display | Status | Mod    |
|---------------------|--------------|-----------------|------|----|---------------------------|-------------------|-------------------|-----------|-----------|--------------------|-------------|----------|----------------|-----------|--------|---------|--------|--------|
| Phase: Phase I (16) |              |                 |      |    |                           |                   |                   |           |           |                    |             |          |                |           |        |         |        |        |
| Phase I             | 1.Initiation |                 | 1    | 0% | Initiation - FINANCIALS   | 8/10/2009 8:00 AM | 8/10/2009 8:00 AM | 0         |           |                    |             |          |                |           |        |         |        | Active |
| Phase I             | 1.Initiation |                 | 2    | 0% | Contract Signing          | 8/10/2009 8:00 AM | 8/10/2009 8:00 AM | 0         | MILESTONE |                    |             |          |                |           |        |         |        | Active |
| Phase I             | 1.Initiation | Proj Management | 3    | 0% | Project or Phase Kick-off | 9/1/2009 9:00 AM  | 9/1/2009 12:00 PM | 0.5       | CON       | Tyler PM           | Tyler PM    | Onsite   |                | Yes       | ALL    | CAL     | Active |        |