Tyler Client SharePoint User Guide
Introduction

The SharePoint User Guide was created to assist the Tyler Client SharePoint Implementation Sites End Users.
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## Introduction

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WHAT IS SHAREPOINT?

SharePoint is a Web-based collaboration tool which allows information sharing and document collaboration. SharePoint lets you create a central location where everyone can share issues, contacts, announcements, Web links, and calendars. Team members can easily manage surveys, documents, task lists, and other collaboration needs that increase their productivity.
Login Instructions

To establish a connection with the Tyler Client SharePoint sites the users should follow the provided instructions. For a successful connection it’s important to check the box Sign Me In Automatically on the login webpage. Sign Me In Automatically means allowing you access thru the entire site.

Hello!

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

**TO LOGIN**

Open a new Internet Browser and type https://tylergateway.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 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

*Additional Internet setting is required. The client IT should be able to push these settings to for the end users.*
1. FIRST TIME LOGIN INTERNET SETTINGS
OPEN: Internet Explorer
GO Internet> Tools> Internet Options> Security Tab> Trusted Sites and enter the URL: https://tylergateway.tylerotech.com > Select Add> Close and click OK to apply the changes. Please see screens shots for assistance.
1. GO TO: https://tylergateway.tylertechnologies.com/tylerclient.
   For any security prompt that may pop up please click OK.

   Enter the Login ID (no capital sensitive) and Password

   ![Sign In Form]

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

   ![Client Sharepoint]

3. WELCOME TO TYLER CLIENT SHAREPOINT!

   ![Welcome Screen]
Requesting More Users Login IDs

- 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.

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

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

![Request Login IDs Form](image)

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⚠️ 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 and provide the user information that needs to gain access to the Request Login IDs list.
Document Libraries

Document Libraries are collections of files that you can collaborate and share with team members. A document library is comprised of files and folders. Files and folders in SharePoint are organized in the same way as they are on your computer’s C: drive or a network file share.

SharePoint sites can have one or more document libraries.

Figure 1: SharePoint Shared Documents

<table>
<thead>
<tr>
<th>Order</th>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td></td>
<td>Client SP Policy E Procedure FINAL DOCUMENT</td>
</tr>
<tr>
<td>01</td>
<td></td>
<td>KICK OFF Check List</td>
</tr>
<tr>
<td>02</td>
<td></td>
<td>Populating a Share Point Project Plan</td>
</tr>
<tr>
<td>03</td>
<td></td>
<td>SharePoint Project Management Tools</td>
</tr>
<tr>
<td>04</td>
<td></td>
<td>MS Project Plan Microsoft Template</td>
</tr>
<tr>
<td>05</td>
<td></td>
<td>EXCEL Project Plan Template</td>
</tr>
<tr>
<td>06</td>
<td></td>
<td>Tyler Client SharePoint Login Instructions</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>Financial Project Master - 09-18-09</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td>PR-HR 6 Months Project Plan</td>
</tr>
</tbody>
</table>
Shared Document - Views

- **Select a View** – This area in the top left corner selects all the available formats for listing documents in the library. By default, there are two such formats:

- **All Documents** – Displays one line of text for each document in the library.

- **Explorer View** – Lists the library contents in a format resembling Microsoft Windows Explorer. This is available only on Windows versions of Internet Explorer, and depending on your MS Office version it will be displayed in a different view format (see uploading multiple documents page).

- **Modify this View / or Create View** – access available based on your permission type.
Library Toolbar

**New** –
- **New Document** – The library has defined a template by default as a Microsoft Word document. Options like Link to a Document and Folder are displayed in mostly library thru the Tyler Client SharePoint Sites.
- **New Folder** – Displays a New Folder page for creating an additional folder within the current open library.

**Upload** –
**Upload Document** – Displays an Upload Document page that allows you to upload one or more documents from your computer or network drive and adds it to the library.

**Actions** –
Additional commands for working within library documents.
• **Edit In Datasheet** – Displays the list of documents as an editable table that resembles a spreadsheet. If Access or Excel 2007 or Higher is installed on the user’s computer, this view also provides a task bar for exchanging data with those programs.

![Datasheet View](image)

• **Open in Windows Explorer** – Lists the library contents in a format resembling Microsoft Windows Explorer. This is available only on Windows versions of Internet Explorer, . and depending on your MS Office version it will be displayed in a different view format (see uploading multiple documents page).

• **Connect to Outlook** - Not supported by user licenses type.

• **Export to Spreadsheet** – Downloads an Excel query file that points to the library/list content.

**IMPORTANT:**

After saving the exported file in Excel, the refresh/sync data options under the MS Office Excel is not supported. For an updated SharePoint list content please repeat the process of Export To Spreadsheet.

• **View RSS Feed** - Not supported refresh/sync data by connections

Lists or Document Libraries can be exported to spreadsheet.

• **Alert Me** – The Alert feature sends e-mail notifications to interested team members whenever another member changes some aspect in the Shared Document library. Please see alert notes specifically for folder level.

![Alert Feature](image)

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 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.
Settings–

Displays a Customization page that modifies the name, description, columns, views and other settings.

Access to these options is based on your permission type.

- **Filter** – Refreshes the current Web page, adding selection controls above the selectable column chevron. These controls filter the list of documents based on the criteria specified.
Exporting to Spreadsheet

Under Action Library menu bar select Export to Spreadsheet and follow the prompts.

- **Prompt#1**

  ![File Download](image1.png)

  **Do you want to open or save this file?**

  Name: owssvr.iqy
  Type: Microsoft Office Excel Web Query File
  From: tylergateway.tylertech.com

  ![Open](image2.png)

  ![Save](image3.png)

  ![Cancel](image4.png)

- **Prompt#2**

  ![Microsoft Office Excel Security Notice](image5.png)

  **Microsoft Office has identified a potential security concern.**

  File Path: C:\...\Temporary Internet Files\Content.IE5\L3OBT7G\owssvr[2].iqy

  Data connections have been blocked. If you choose to enable data connections, your computer may no longer be secure. Do not enable this content unless you trust the source of this file.

  ![Enable](image6.png)

  ![Disable](image7.png)

- The view selected from the SharePoint list will be exported to excel on its integrate even if you have applied column filters.
### Recurrence Table

<table>
<thead>
<tr>
<th>Recurrence</th>
<th>Phase</th>
<th>WBS</th>
<th>Sub Category</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>FALSE</td>
<td>BLOCKED</td>
<td>5. Static Environment Test</td>
<td>Control Point</td>
<td>TESTING NEW TASK LIST WF 1/1</td>
</tr>
<tr>
<td>FALSE</td>
<td>BLOCKED</td>
<td>5. Static Environment Test</td>
<td>Control Point</td>
<td>TESTING NEW TASK LIST WF 1/1</td>
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<td>Control Point</td>
<td>TESTING NEW TASK LIST WF 1/1</td>
</tr>
<tr>
<td>FALSE</td>
<td>Phase I</td>
<td>1. Initiation Training</td>
<td>100.00% Task Test Client SP Workflow</td>
<td>REV WF Demo-Task 1 1/1</td>
</tr>
<tr>
<td>FALSE</td>
<td>Phase I</td>
<td>1. Initiation Training</td>
<td>100.00% Task Test Client SP Workflow</td>
<td>REV WF Demo-Task 1 1/1</td>
</tr>
</tbody>
</table>

**Table Name:** Microsoft Excel

**Table Tools**

- **Home**
- **Insert**
- **Page Layout**
- **Formulas**
- **Data**
- **Review**
- **View**

**Table**

- **Table Name:** Microsoft Excel
- **Table Options:**
  - **Table Design**
  - **Table Style Options**
  - **Table Styles**

**Excel Features:**

- **Data Validation**
- **Conditional Formatting**
- **Table Style Options**
- **Table Styles**

**Modified Date:** 06/29/2012
Document Options Menu

To display the document options in a shared document library, hover your mouse over the file name and click on the chevron. The following options are displayed:

*Figure 2: Document Options Menu*

**View Properties** – Displays all available information about the document.

**Edit Properties** – Displays a page where you can modify the document’s name or title.

**Edit in Microsoft Office** – Opens the document for editing in Microsoft Office.

**Delete** – Deletes the document from the document library.

**Send To** - Download a copy and Email a link (Office Outlook product is required by the user) are supported by the connection. Links sent to client users require login into the site.

**Check-In/Check-Out** – Prevents anyone but you from updating the document (after you select this option, it changes to Check In). * Prior setting on the library must be done for this option.

**Version History** – Displays a history of updates to the document.

**Workflow** – Allow the user to start workflow on a specific document. *Workflow setting has to be prior set.

**Alert Me** – The Alert feature of a Team Site sends e-mail notifications to interested team members whenever another member changes some aspect of the selected file.

**IMPORTANT:**

Access to all options is based on your permission type.
How to Upload a Single Document

1. From the Quick Launch bar on the left hand side of your Home Page, select Shared Documents Library you need to upload the document. If you are uploading into a certain folder go the root of the folder.

   Select Upload Document from the document library toolbar.

2. Click on Browse.

3. Highlight the file you want to upload, and click Open.
4. Verify that you want to **Overwrite existing file(s)**. If a file of the same name already exists in the document library, you can force the file to be replaced by selecting the checkbox. This will save in **Version History**, then Click the **Ok** button to upload the document to the document library.

![Add as a new version to existing files]

5. Fill the required fields by the library settings then click **OK**.

![Fill required fields](Project Docs: TYLER TECHNOLOGIES INC)

![Upload successful](Project Docs: TYLER TECHNOLOGIES INC)
Uploading Multiple Documents

1. From the Quick Launch bar on the left hand side of your Home Page, select Shared Documents as shown in on prior page.

2. Select Upload Document from the document library toolbar as shown in prior page.

3. Click on Upload Multiple Files...

4. This will open the Explorer View. Select the location and select the files you want to upload by selecting their corresponding checkbox.

5. **Overwrite existing file(s).** If a file of the same name already exists in the document library, you can force the file to be replaced by selecting the checkbox. This will save in Version History.

6. **Different MS Office Version**

   Depending on MS Office version you may see this window below and if that is the case, click on Browse For Files Instead from your computer and drag them into the blue area/window. Remember to check the box Add a new version to existing files. Click ok to finalize the upload.
7. Click on **OK** when the upload is done.

8. A Dialogue box will appear confirming your upload. Select **Yes** if you want to execute the upload. Otherwise, select **No** to cancel the upload.

**IMPORTANT NOTE:**

MS Office 2010 is limiting the capability with the uploading multiple with SharePoint. We do not support multiple uploading documents errors with MS Office 2010 because of the inconsistence between the 2 products. Many SharePoint users have contacted Microsoft about this and they are working on creating a solution between SharePoint and MS Office products.
Creating Folders

There are two ways to create a folder in the document library. **All Documents** view:

1. From the library **toolbar** of your Shared **Documents** select Folder.

![Folder toolbar](image)

2. The document library **New Folder** page will be displayed. In the **Name** field, enter a name for the folder you wish to create and then click **Ok**.

![New Folder](image)

**Explorer View:**

1. Select **Explorer View** under the **Select a View** in the left-hand navigation bar.

![Explorer View](image)
2. Right click in the area where the other files and documents are listed and from the drop down box select **New → Folder**.

3. Enter the folder name
Editing Shared Documents

It is highly recommended **Checking Out** documents before editing them. This prevents other people from editing the same document that you are working on. However, this does not prevent other people from viewing documents that are checked out.

**Using Check In / Check Out**

To **Check Out** a document in SharePoint:

1. Hover your mouse over the file name and click on the down arrow on the file you want to edit, as displayed below. Select **Check Out** from the pull down menu selection.

   ![Check Out Menu](image)

   **Note the Check Out sign next to the doc type icon.**

2. A prompt to confirm check out click **Ok**.

   ![Check Out Confirmation](image)
3. The document will not open at the Check Out. It is necessary to click on the document already hyperlinked name for editing. Dialog box will appear.

4. Once you’ve completed working on the document and have saved it, check it back in. There are two ways to do this.
   a. In Microsoft Word, click the Office Bottom Server Menu and select Check In.
      Prompts may differ based on MS Office version.

   OR

   b. In Microsoft Word just close the doc by clicking on the on upper right
      You will be prompted for Check In Comments. After you enter your comments and click OK, the comments will be available for view by adding the column Check In Comment to the library view or by selecting the document Versions History from the document drop down menu.
Select **Yes** to publish the new version to all site members.

Note the Check out/In status will automatically updated in the Shared Documents Library.
Editing Documents

1. Hover your mouse over the file name you want to edit, and click on the down arrow. Select Edit in Microsoft Office Word (Excel, Access, etc) from the pull down menu selection.

![File Properties Menu](image)

**NOTE:** If you click directly on the document name or select View Properties from the pull down selection, the document will open as READ ONLY.

2. Saving changes to shared Microsoft Office documents works the same as with any document stored locally on your hard drive or network drive. Just type CTRL-S or click on from the menu bar and or select Save to save changes. Then close the document by closing the Microsoft Word.

Editing a Microsoft Word Document that is Checked Out

If you try to open an Word/Excel document that is already checked out, you will receive the following Dialogue window:

![File In Use Dialogue](image)

1. **READ ONLY:** Opens a Read Only copy – you will not be able to edit and/or save changes to the document.

2. **NOTIFY:** This will open a Read Only copy. However, if the document is checked in while you still have it open, a message will appear indicating the document is now available for editing. Click on Read-Write which will then allow you to edit and save the changes.
3. CANCEL: Will not open the document for editing.

**Editing a Microsoft Excel document that is Checked Out**

If you try to open an Excel document that is already checked out, you will receive the following dialogue box indicating that *This file is locked for editing*.

1. READ ONLY: Opens a Read Only copy. You will not be able to edit and save changes to the document.
2. LOCAL COPY: Creates a local copy and will merge your changes later. Same as Option One; acts as Read Only.
3. NOTIFY: Receive notification when the original copy is available – This will open a Read Only copy. However, if the document is checked in while you still have it open, a message will appear indicating the document is now available for editing. Click on Read-Write, which will then allow you to edit and save the changes to the document.
4. CANCEL: Will not open the document for editing.

**Using Document Versions**

With Document Versions turned on, SharePoint will retain not only the current version of each document, but all historical versions as well. Any site member can then use the following procedure to investigate the version history of a document.

1. Hover your mouse over the file name of the document you select, and click on the down arrow. Click on Version History.
2. The Versions page displays each version of a document in the current library. To work with these versions, hover your mouse over the file name of the document, and select one of these options:

**View** – Opens the selected document version.

**Restore** – Creates a new copy of the document version, and makes it the current version (This will increment the current version number by one).

**Delete** – Removes the version from the library.
Tyler Client SharePoint Availability

Availability

The active Tyler client SharePoint sites are available 24/7 to all authenticated users.

The sites will be made unavailable only in case of technical maintenance schedule that is needed to be performed by Tyler MIS group. Notification will be send to all users with a valid email account.

All other technical issues that may occur and affect the sites availability are made priority to Tyler MIS Group to promptly work on having it available shortly. If during your connection the message “Services Unavailable” is displayed on the screen, please try again few minutes later. Any trouble shooting performance that will take longer than 30 minutes an email notification will be send out to all users.
Trouble Shooting

“Invalid username or password. Please re-enter your user information”.

On this case please verify your URL on the internet browser. Invalid or incomplete URL will take you to an unauthorized webpage (*) Client SharePoint users Tyler Sign In security webpage. If after assuring you have typed the correct URL showed on the login instructions and the username or Password still not being accepted, please contact tyler.clientadminsp@tylertech.com. Any assistance from the Tyler SharePoint Administrator can be provided between 8:00AM – 4:30 PM EST, and if necessary we will schedule a support meeting for further assistance. Tyler SharePoint Administrator will do not modify any changes on your machine settings.

*  

The files (MS word, Excel, PPT, PDF) in the SharePoint libraries do not open on my machine.

For immediate help on accessing the desired document, from the drop down menu file select the option “download a copy”. It will not block the others to have access to the document. It will also will give you an option to save on your desktop or simply open.
The Sign In dialog box keeps popping up

Please log off completely from the site and log back in assuring the Sign me in automatically is checked.

If the problem continues please contact your IT department to check your IE setting/ Control ActiveX.

Error on page

This may be caused by ActiveX Control Run error on page message on the left bottom of Client SharePoint Welcome page will be displayed.
In order to proceed with the access to your site SharePoint site please follow the below.

Click on Tools on the top of IE page menu bar or depending on your internet version on the right corner of your page.

Again, click on Tools>Internet Options>
Advanced Tab>

Reset>

Reset Internet Explorer settings

 Resets Internet Explorer’s settings to their default condition.

You should only use this if your browser is in an unusable state.

The pop window click Reset>
Click on Close>

Click OK and then F5 to refresh your page or click on the icon next to your web browser address.
The ActiveX Control yellow bar must appear below your IE browser. Right click on it and select Run Add-on.

Click Run for the follow prompts

If the issue continues please contact tyler.clientadminsp@tylertech.com.