

W E L C O M E T O  
**CONNECT**



# Useful Practices and Handy Tips in Financial Management



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Implementation  
Consultant- Financial  
Management

# FM Useful Practices and Handy Tips

Some methods for getting the most out of the system, yielding –

- Time savings
- Greater efficiency
- Standardization of practices



Home Page  
Tools

Reconciling  
Subledger  
Reports to  
G/L Reports

Creating  
Report  
Templates

Adding pages  
to favorites

Deleting  
Inactive  
Templates.

System  
Notifications.

Search Grid  
Headers.

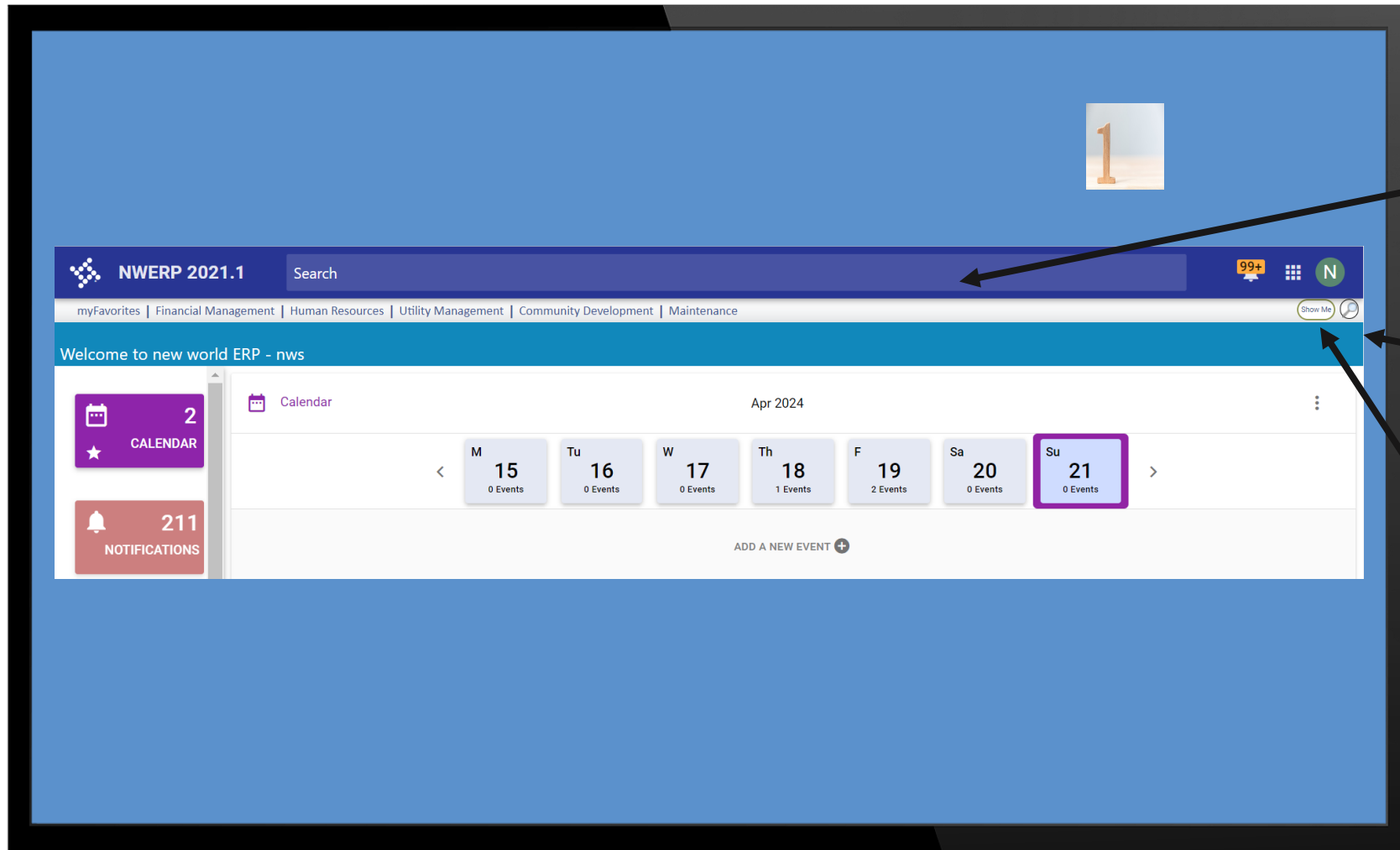
Inactivating  
Users.

# What Tools are Available on my Homepage?

The screenshot displays the NWERP 2021.1 homepage. At the top, there is a dark blue header with the NWERP logo and version number on the left, a search bar in the center, and a notification bell with '99+' and a user profile icon 'N' on the right. Below the header is a light blue navigation bar with links for 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. A 'Show Me' button is also present.

The main content area features a blue banner with the text 'Welcome to new world ERP - nws'. On the left side, there is a vertical sidebar with four task widgets: 'CALENDAR' with 2 items, 'NOTIFICATIONS' with 211 items, 'APPROVALS' with 7 items, and 'REPORTS' with 50 items.

The central part of the page is dominated by a calendar widget for April 2024. The calendar shows a week from Monday the 15th to Sunday the 21st. The number of events for each day is: M 15 (0 Events), Tu 16 (0 Events), W 17 (0 Events), Th 18 (1 Events), F 19 (2 Events), Sa 20 (0 Events), and Su 21 (0 Events). The Sunday 21st is highlighted with a purple border. Below the calendar is a button labeled 'ADD A NEW EVENT +'. The calendar widget also includes a 'Calendar' title, a date selector 'Apr 2024', and a 'Show Me' button.



We'll examine the use of

- 1) Global Search

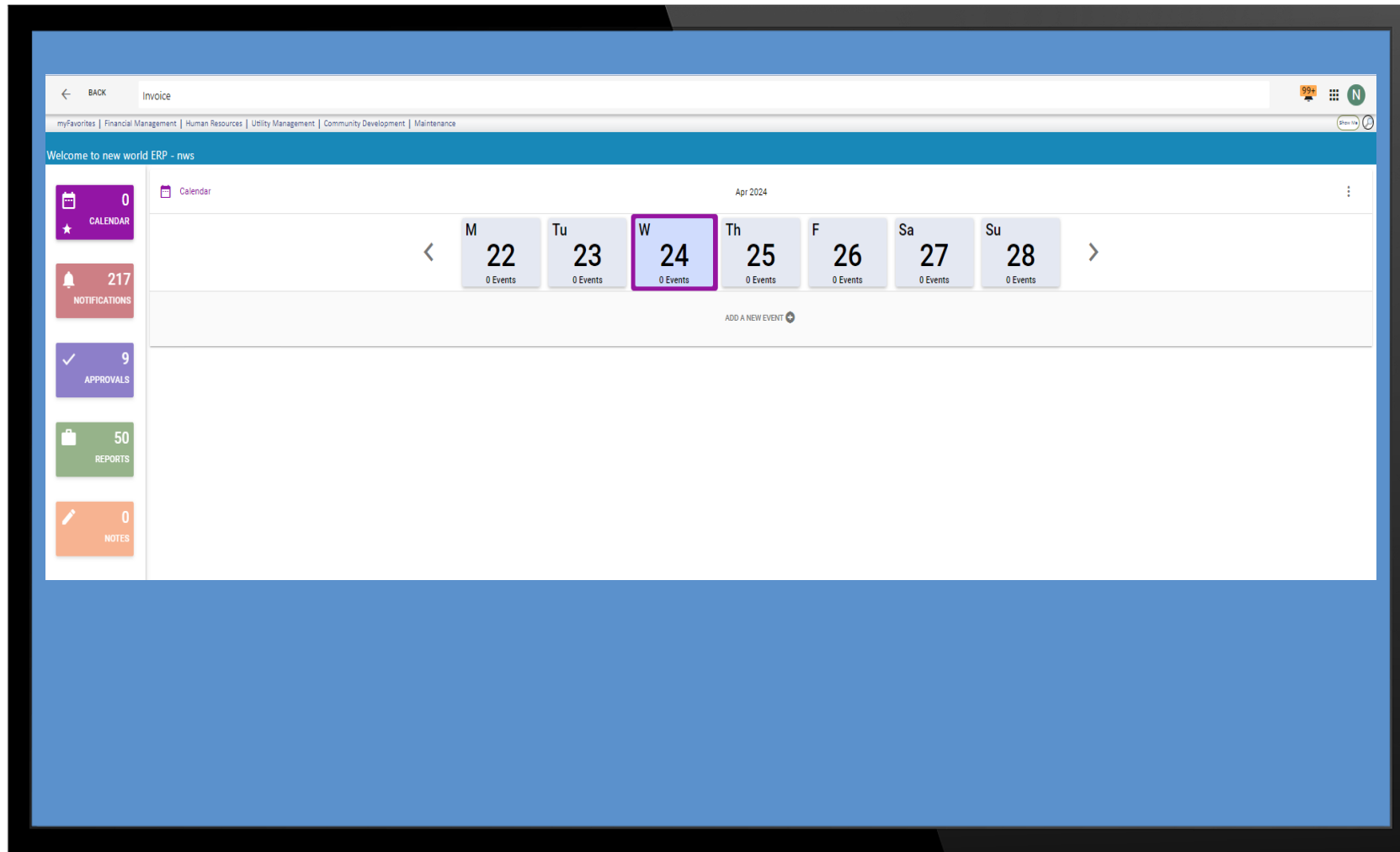
- 2) Quick Navigate Tool

- 3) Show Me button

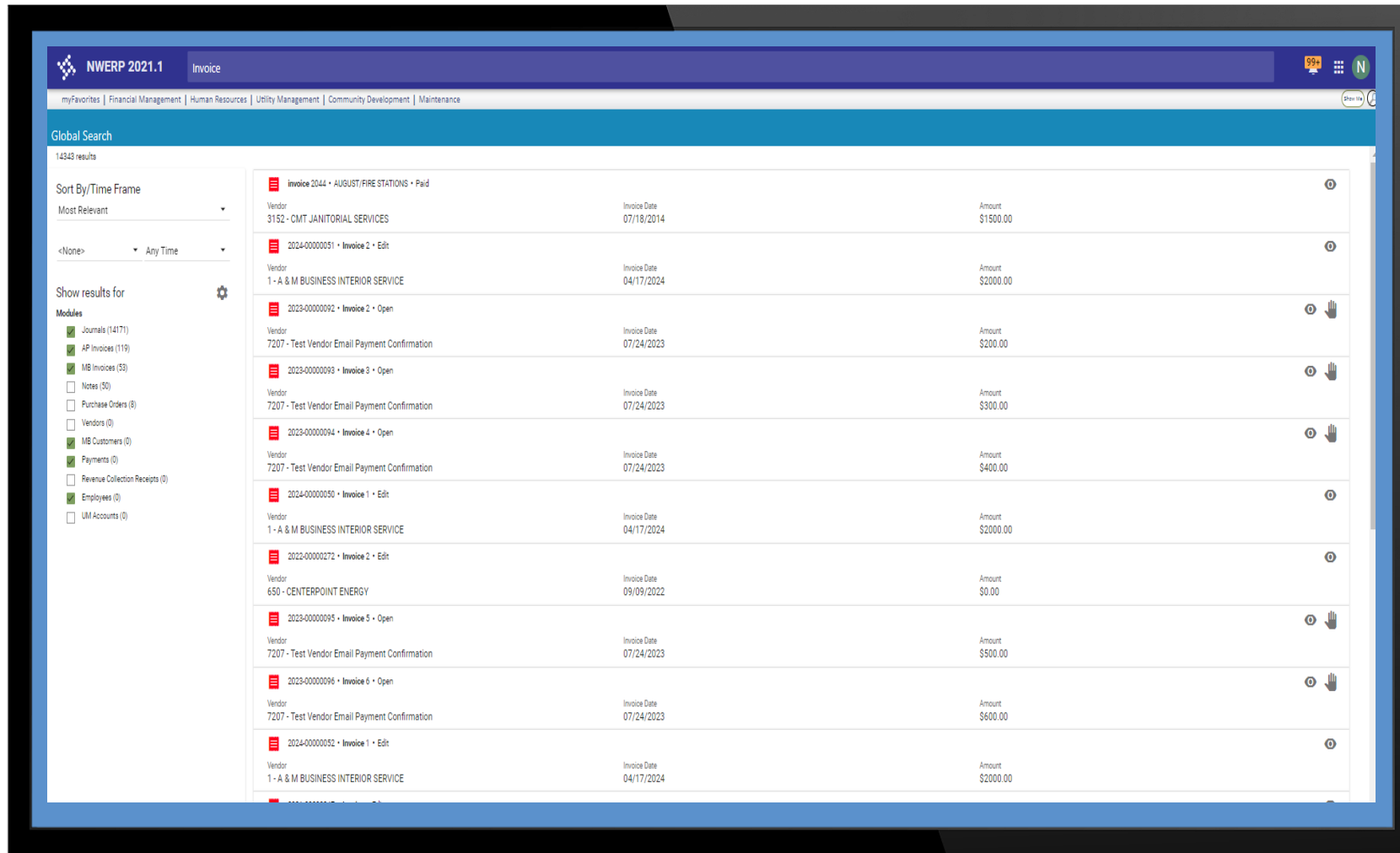


## What is Global Search?

- ➔ It is a convenient way of searching the system, across all modules for a specific topic.
- ➔ It is a search function that makes use of sub-filters to quickly narrow down the results of your search.



Here, we are simply searching the term invoice.

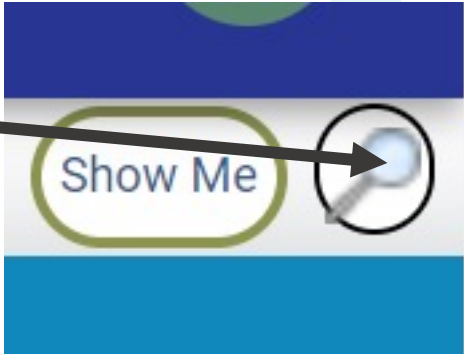
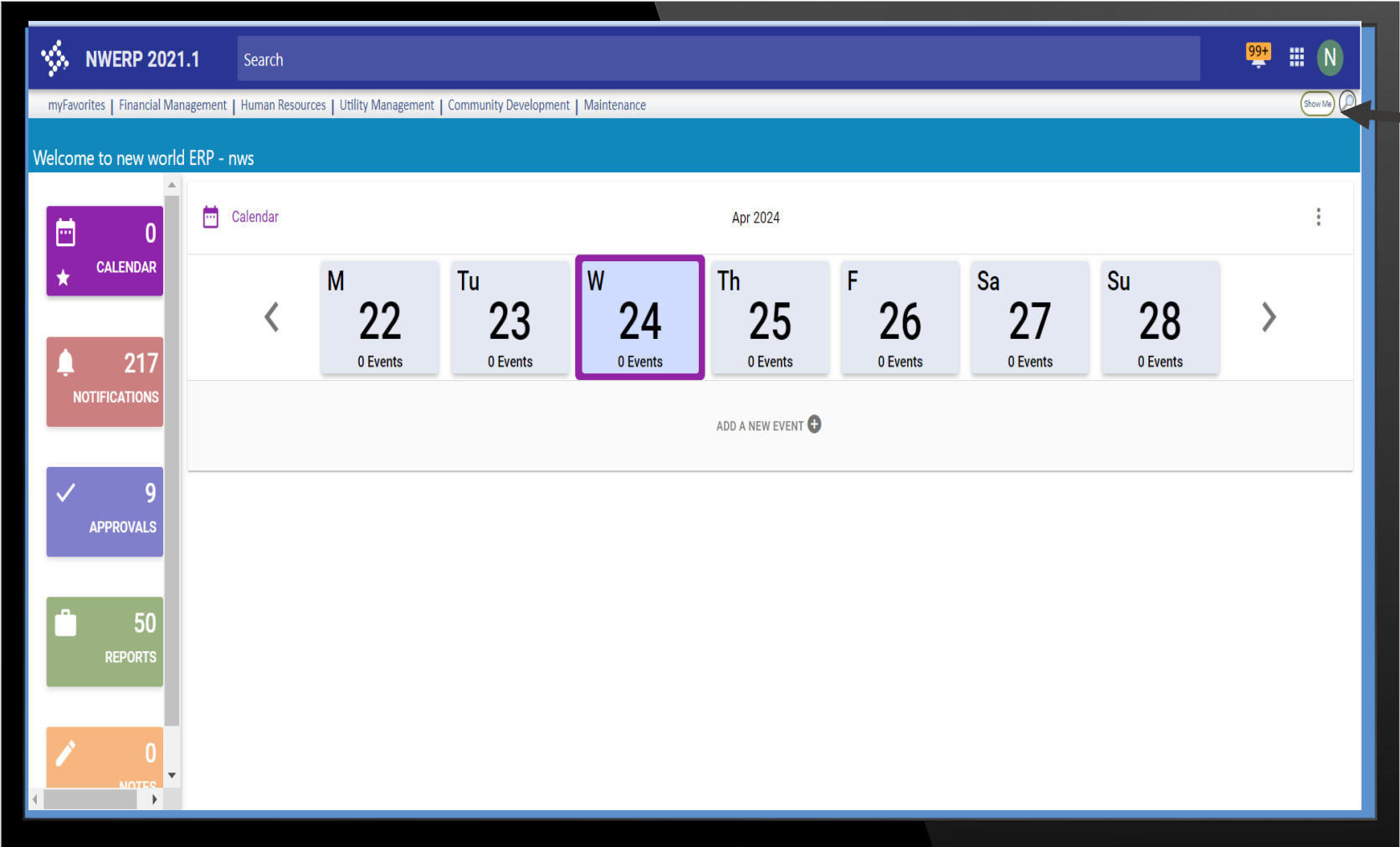


Search results will be displayed across filters on the left.

Default filters can be set using the settings icon next to the filters.

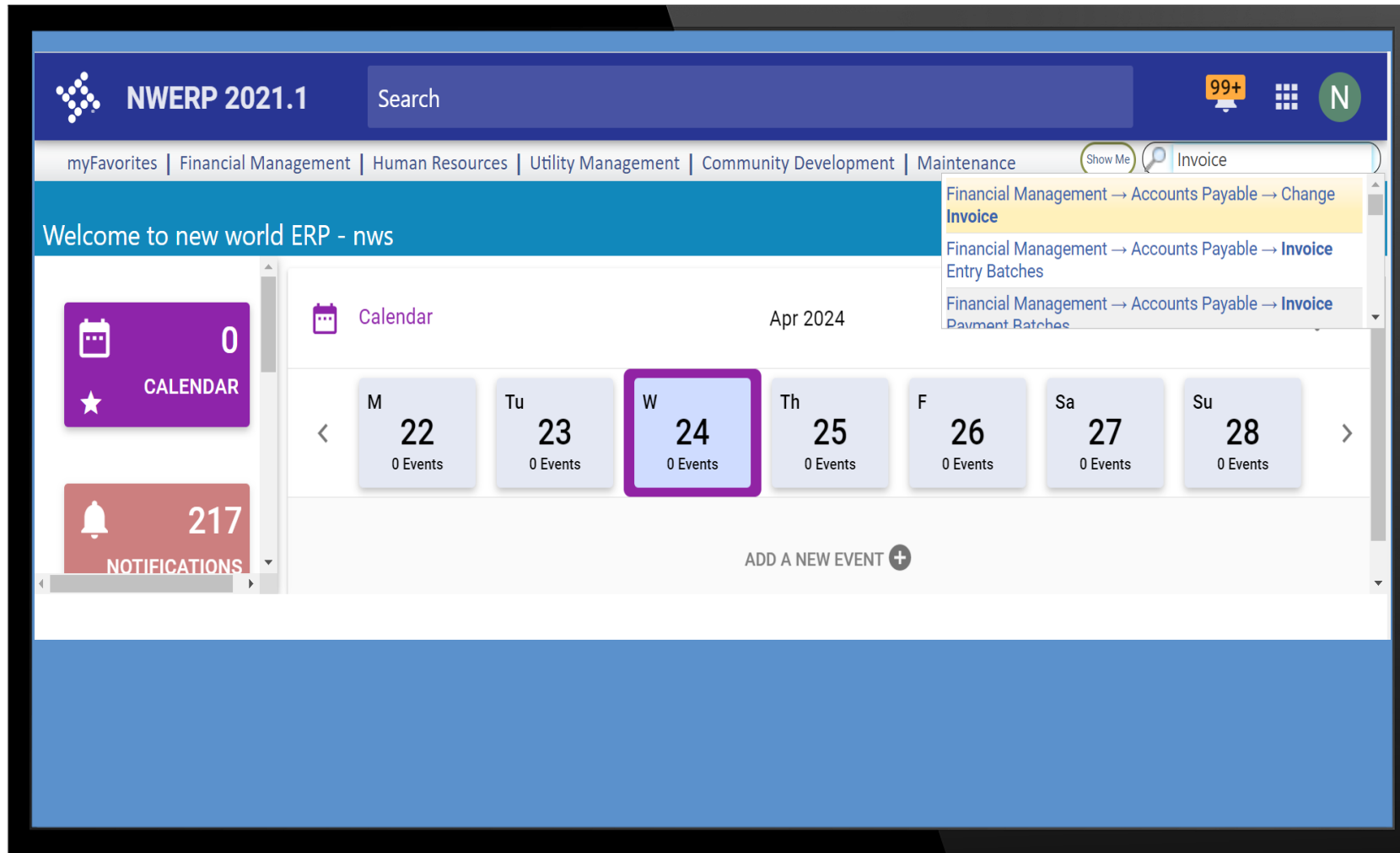
Individual results can be accessed by clicking the eyeball icon to the right.

# Quick Navigate Tool



The advanced search icon allows you to quickly locate specific pages within the system.

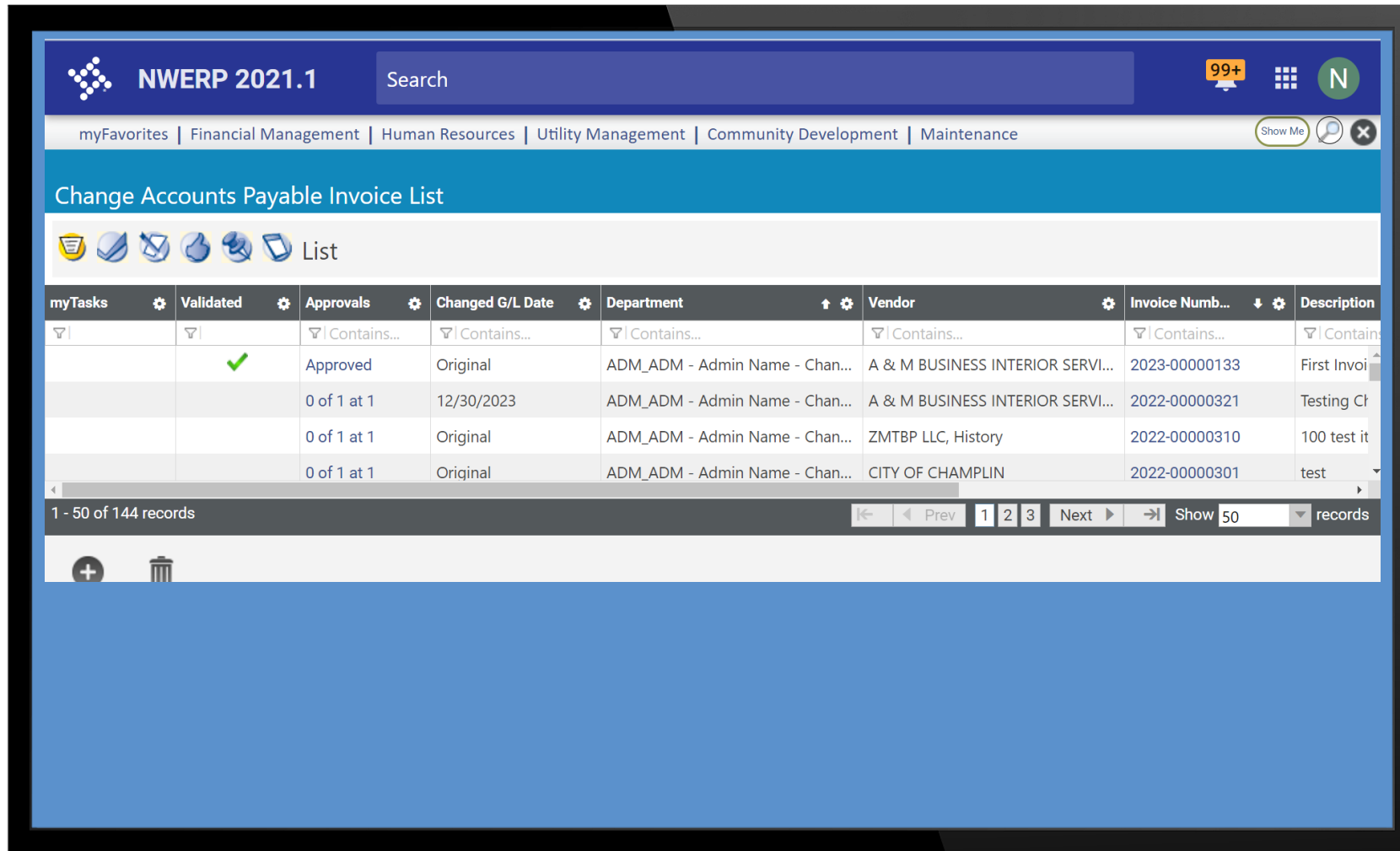
# How Do I Use the Quick Navigate Tool?



Simply enter the search term for the page you want to find.

Result is displayed in a clickable shortcut link.

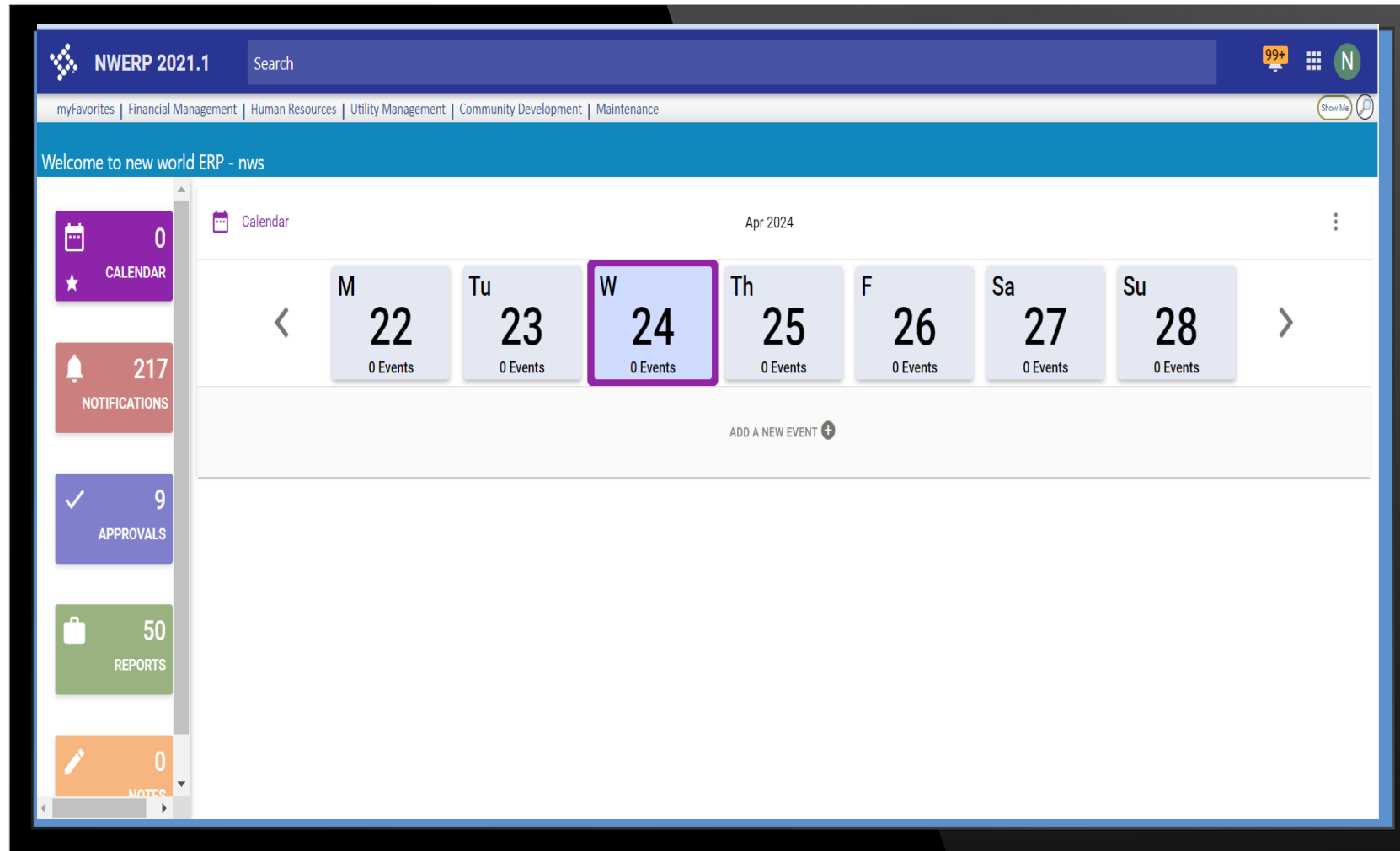




Clicking the top result brought me to the Change Accounts Payable Invoice List page.

This is an alternative to saving shortcuts for different pages.

# What is the Show Me Button?



The Show Me button is a powerful tool that will help you navigate to and walk through different processes.

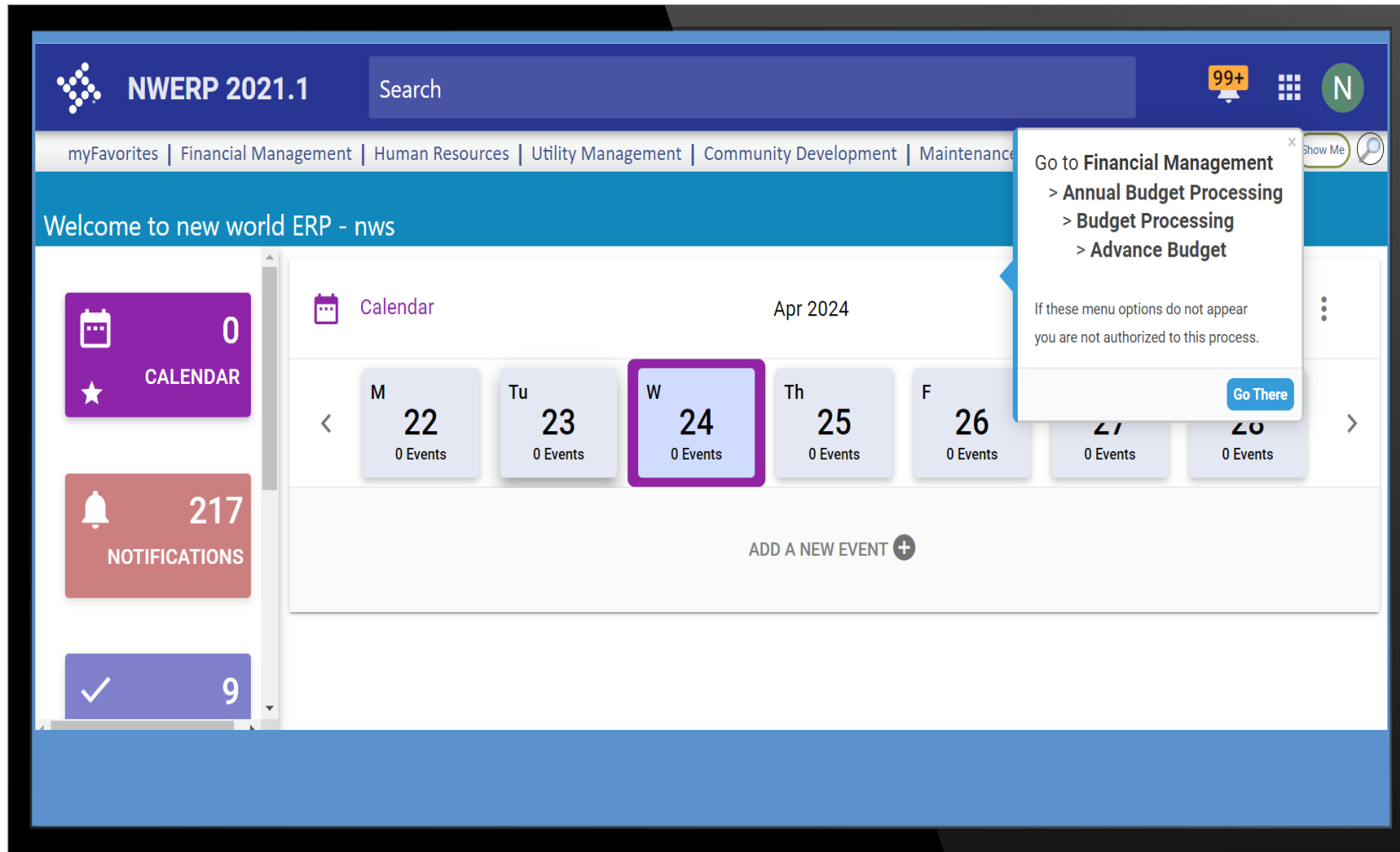
## How Do I Use It?

The screenshot displays the NWERP 2021.1 user interface. At the top, there is a navigation bar with the logo, version number, and a search bar. Below this is a horizontal menu with links for 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. The main content area is divided into a left sidebar and a central workspace. The sidebar contains five widgets: 'CALENDAR' (0 items), 'NOTIFICATIONS' (217 items), 'APPROVALS' (9 items), 'REPORTS' (50 items), and 'NOTES' (0 items). The central workspace shows a calendar for April 2024, with the 24th highlighted. A search bar at the top right of the workspace contains the text 'Budget'. Below the search bar, a list of results is displayed, including 'Annual Budget Processing', 'Advance Budget Levels', 'Un-Advance Budget Levels', 'Update Position Budget Year', 'Create Position Budget Adjustment Factor', 'Initialize Annual Budget', and 'Maintain Position Budget Benefits'. The interface is powered by walkme.

Simply click the button to activate it, then enter your topic.

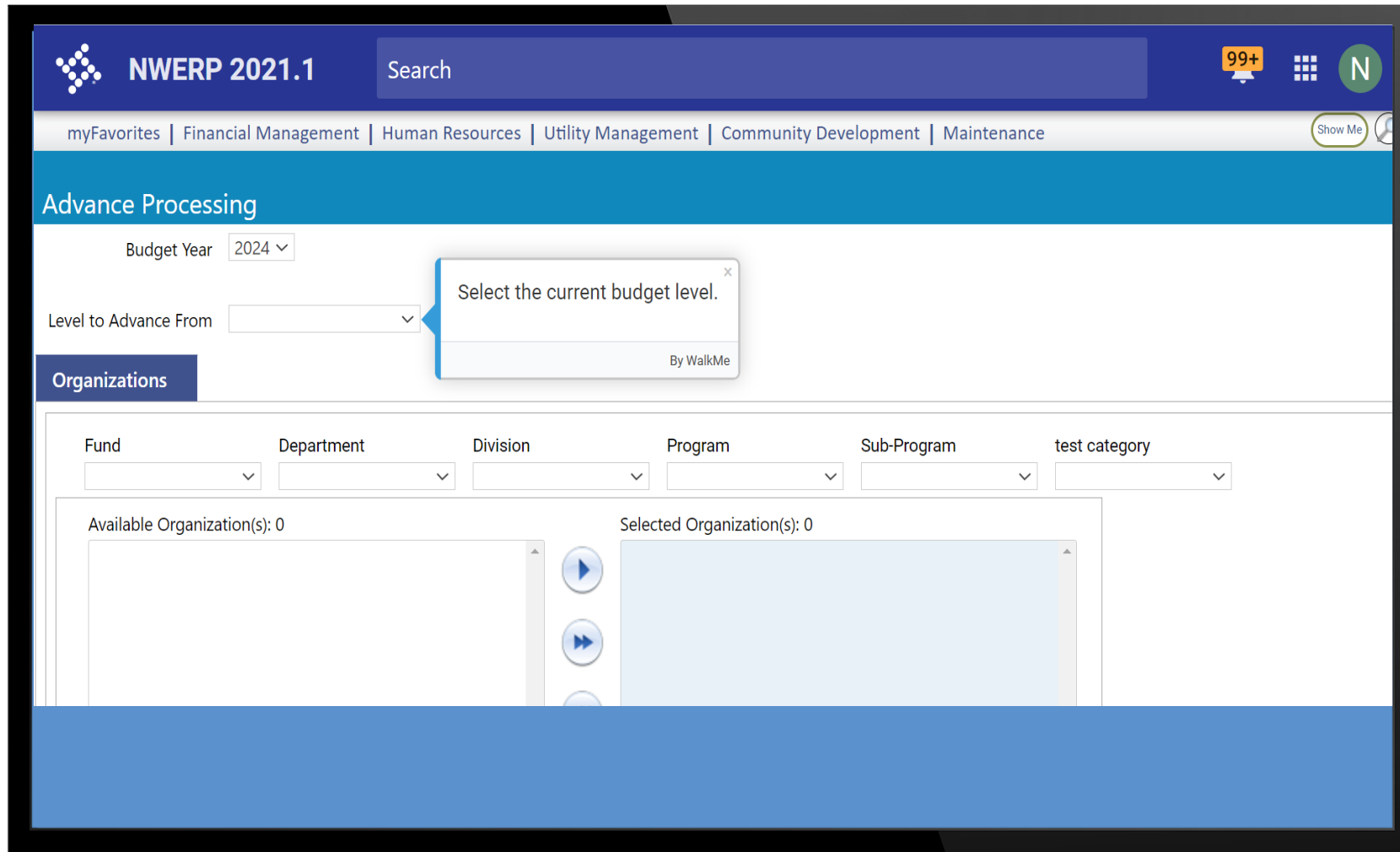
The results list will populate dynamically as you enter your query.

Select the process or process details by clicking.



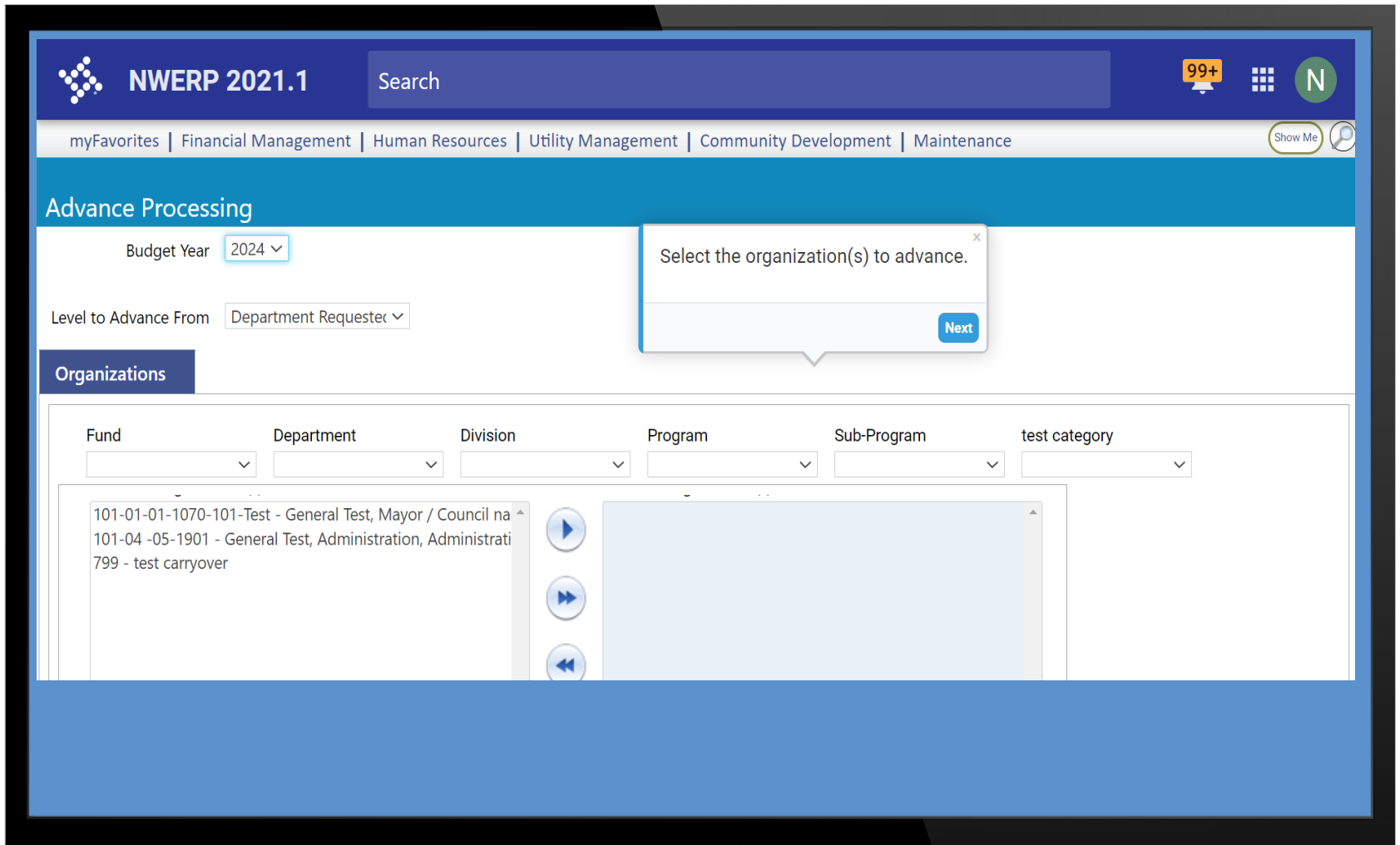
Clicking *Advance Budget Levels* gives a pop-up preview window.

Click *<Go There>*

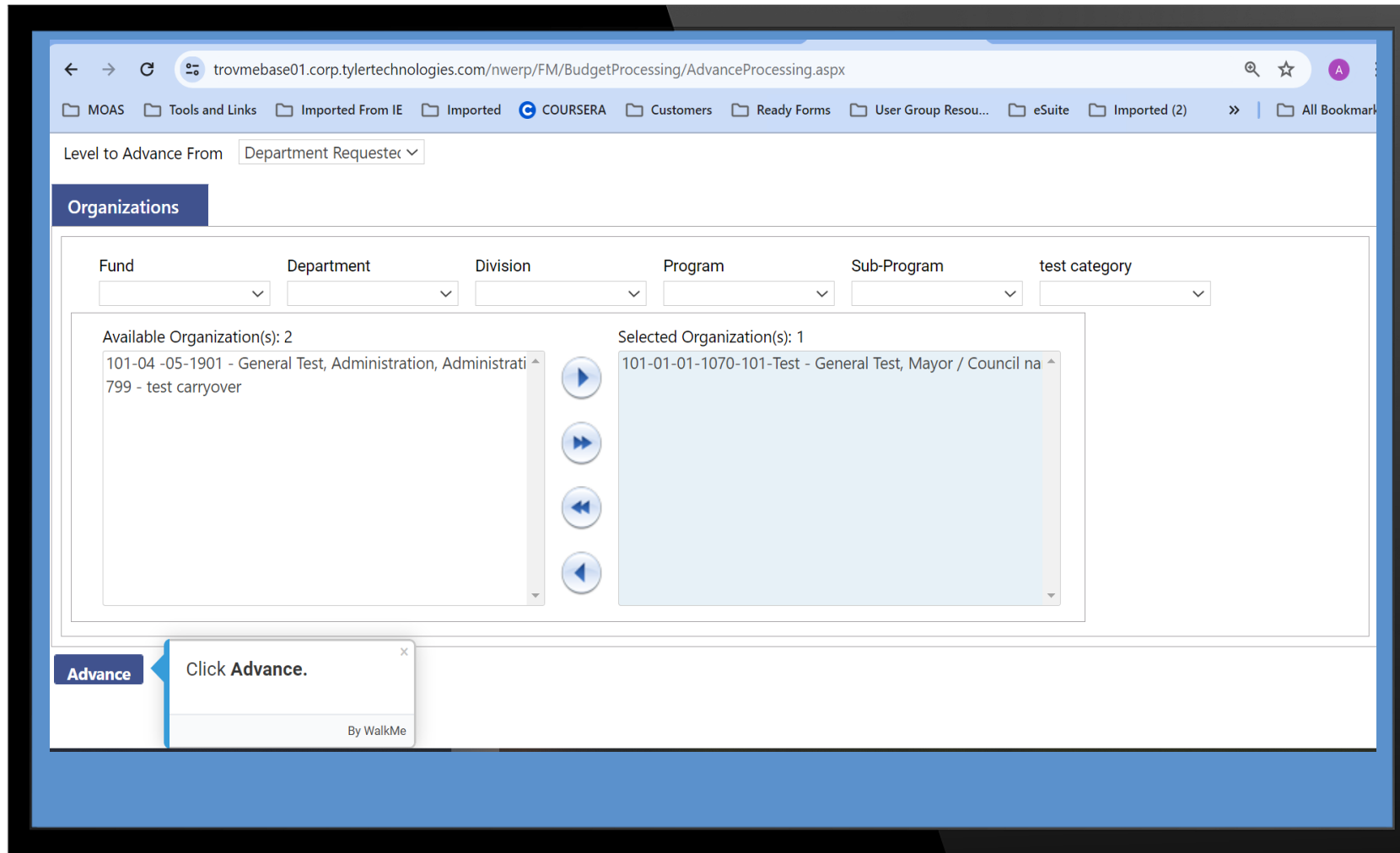


The system will navigate to the page and, through a series of pop-up prompts, walk you through the process.

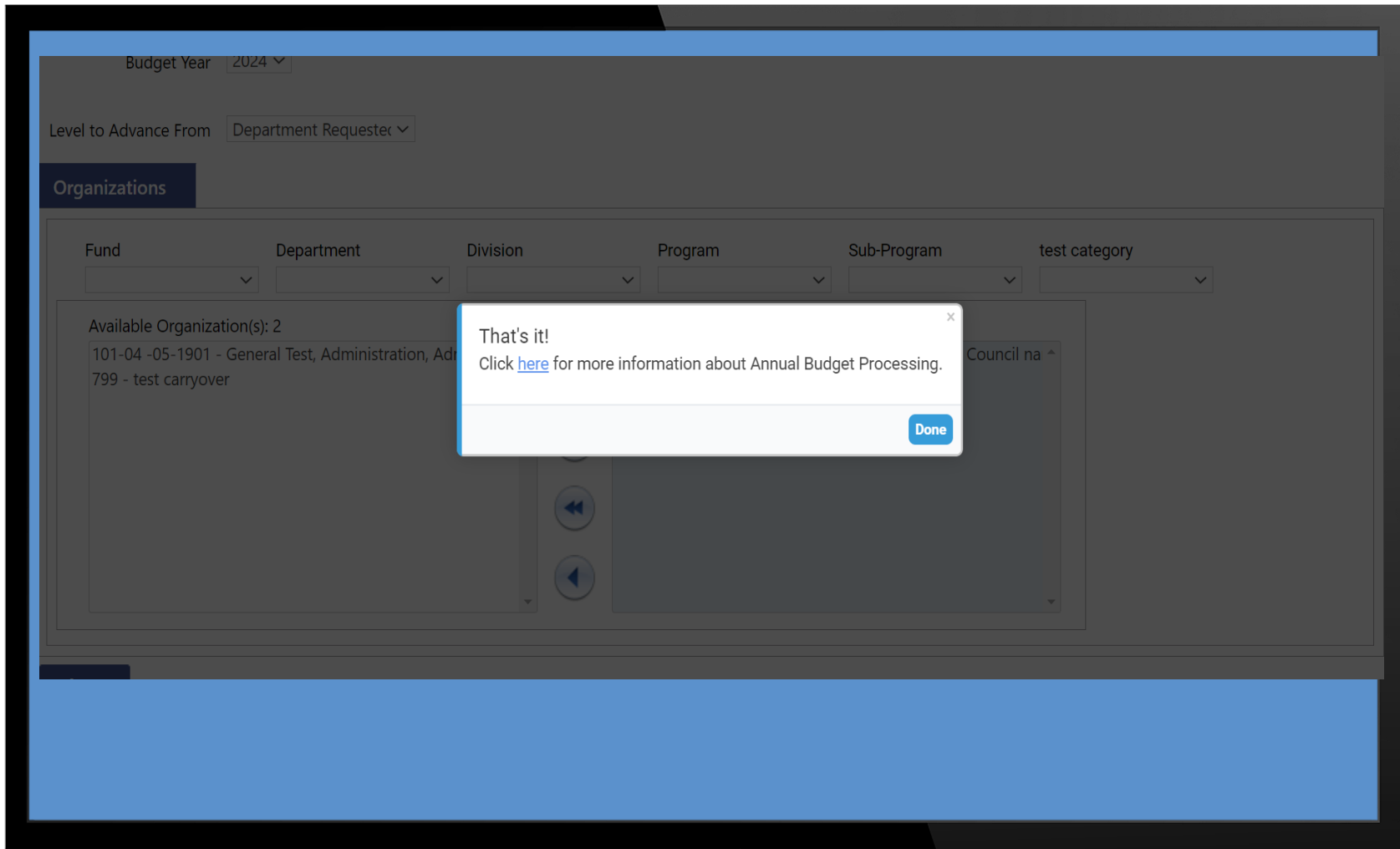
Follow the prompt for selecting the current budget level.



Next, follow the prompt for the organization(s) you want to advance.

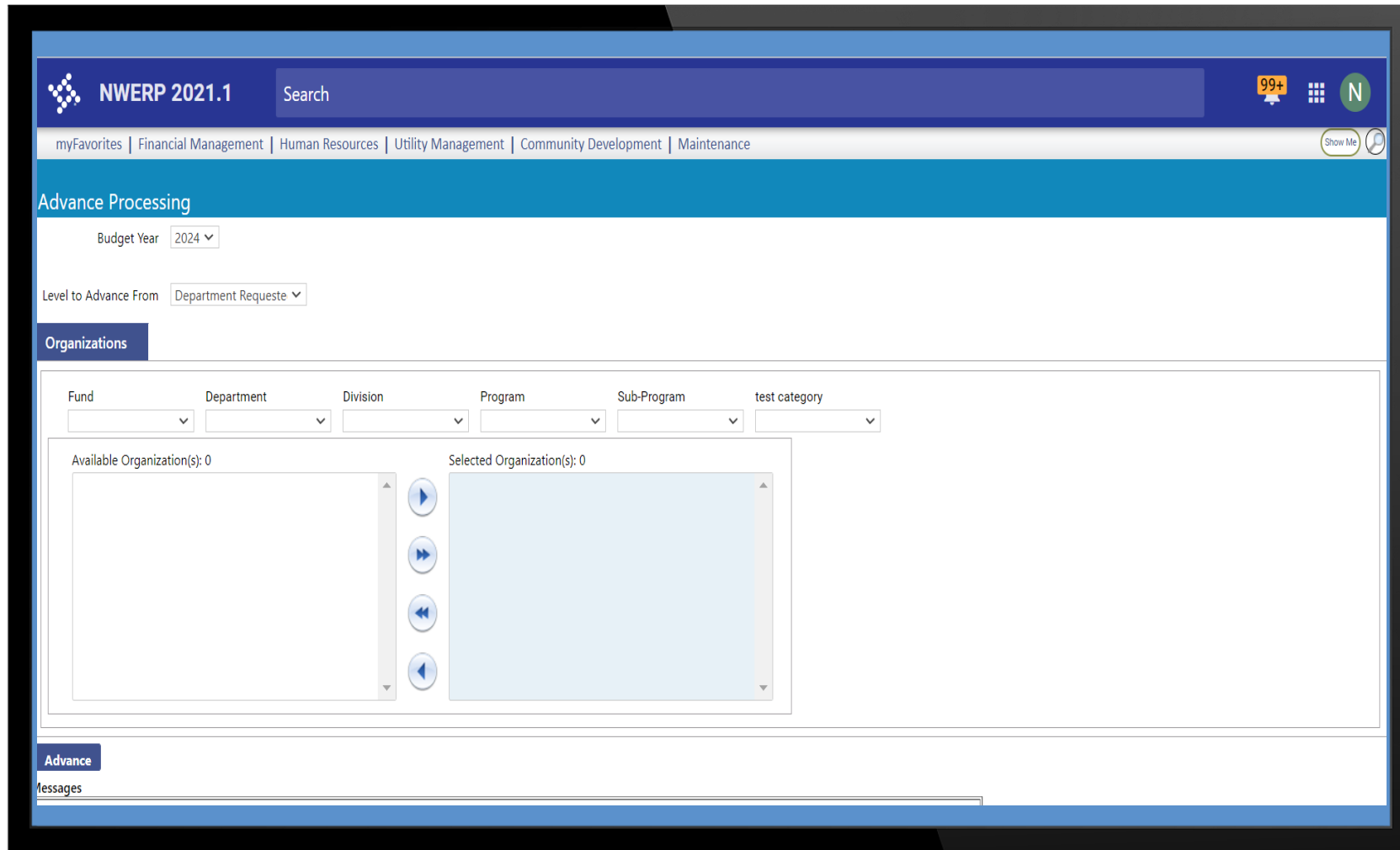


Click the *<Advance>* button to complete the process.



Finish





The page will display that the activity has been completed.

The background features a decorative pattern of colorful circles and arcs in shades of teal, yellow, orange, and pink, arranged in a circular or semi-circular pattern on the right side of the page. A vertical gradient bar is visible on the far left edge.

Reconciling Subledger Reports to the General Ledger

Purchase Order Encumbrances

Accounts Payable

Accounts Receivable

## Balance Open Purchase Orders to GL Encumbrances.



Reports to run:

- Purchase Order Encumbrance Reconciliation Report
- Open Purchase Order Report

**Encumbrance  
Balances to  
Open POs**



Welcome to

 **CAL**

 **NOTIFIC**

 **APPR**

 **50**  
**REPORTS**

 **0**  
**NOTES**

- Journals ▶
- Revenue Collections ▶
- Payment Processing ▶
- Annual Budget Processing ▶
- Year-End Processing ▶
- Receipt of Goods ▶
- Accounts Payable ▶
- Procurement ▶
- Bank Reconciliation ▶
- Project Accounting ▶
- Grant Management ▶
- Asset Management ▶
- Miscellaneous Billing ▶
- Inventory Control ▶
- Government Reporting ▶
- Work Orders ▶
- Special Assessments ▶
- Reports ▶**
- Inquiries ▶

- General Ledger ▶
- Budgetary ▶
- Annual Budget ▶
- Revenue Collections ▶
- Accounts Payable ▶
- Receipt of Goods ▶
- Purchasing ▶**
- Bank Reconciliation ▶
- Project Accounting ▶
- Grant Management ▶
- Asset Management ▶
- Miscellaneous Billing ▶
- Inventory Control ▶
- Bids ▶
- Contracts ▶
- Dynamic Reports ▶
- Work Orders ▶
- Special Assessments ▶

- Voucher Requisition Report
- Voucher Report
- Requisition Report
- Purchase Order Report
- Purchase Order Audit Report
- Purchase Orders by G/L Distribution Report
- Open Purchase Order Report
- Purchase Order Encumbrance Reconciliation Report**

Calendar view showing days M, Tu, W with dates 20, 21, 22 and 0 Events.

# Balance Open Purchase Orders to GL Encumbrances.

## Selection Criteria:

- ❖ Report Detail = Detail
- ❖ Only Return Differences - Yes
- ❖ Prior Year Purchase Orders = Include
- ❖ Include Soft Close Transactions - Yes

The screenshot displays a reporting interface with the following settings:

- Report as of Date: 12/31/2023
- Budget Balances: Annual
- Report Detail: Detail
- Only Return Differences:
- Prior Year Purchase Orders: Include
- Prior Year Fiscal Activity: Include
- Summarize to Organization Level: (dropdown)
- Page Break Level: (dropdown)
- Subtotal by Classification Level: None
- Include Accounts with Zero Encumbrances:
- Include Soft Close Transactions:

Navigation tabs: Departments, Organizations, Accounts, Account Classifications (selected).

Available Account Classification(s): 0

Selected Account Classification(s): 27

- Expense Classification 1 - 1 - - - Position Budgeting
- Expense Classification 1 - 10 - INS - Insurance
- Expense Classification 1 - 11 - UTIL - Utilities
- Expense Classification 1 - 12 - COS - Cost of sales
- Expense Classification 1 - 13 - CONF - Conferences and schc
- Expense Classification 1 - 14 - DUES - Dues and subscripor
- Expense Classification 1 - 15 - OTH - Other charges
- Expense Classification 1 - 16 - Social Svcs - Social Svcs
- Expense Classification 1 - 17 - CON - Contingency
- Expense Classification 1 - 18 - GFC - General Fund Charges

**Encumbrance  
Balances to  
Open POs**

## Summary Purchase Order Encumbrance Reconciliation Report

Budget Balances: Annual    Prior Year Purchase Orders: Include

Report as of Date: 12/31/2023

	Amended Budget	YTD Expenses	YTD G/L Encumbrances	Budget - YTD Exp/Enc	YTD PO Encumbrances	Encumbrance Difference
<b>Fund: 101 General Test</b>						
<b>Department: No Department Assigned</b>						
1234 Dummy Account	\$0.00	\$104,598.00	\$62,760.00	(\$167,358.00)	\$22,426,750.27	(\$22,363,990.27)
6206 Operating Supplies	\$0.00	\$68,710.24	(\$499,990,851.00)	\$499,922,140.76	\$1,100,517,017.36	(\$1,600,507,868.36)
<b>Department: No Department Assigned totals:</b>	<b>\$0.00</b>	<b>\$173,308.24</b>	<b>(\$499,928,091.00)</b>	<b>\$499,754,782.76</b>	<b>\$1,122,943,767.63</b>	<b>(\$1,622,871,858.63)</b>
<b>Department: 01 Mayor / Council name</b>						
<b>Division: 01 Legislative</b>						
6204 Repair & Maintenance Supplies	\$0.00	\$10,000.00	\$10,000.00	(\$20,000.00)	\$32,332.72	(\$22,332.72)
6210 Small Equipment	\$0.00	\$5,000.00	(\$5,000.00)	\$0.00	\$860.82	(\$5,860.82)
<b>Division: 01 Legislative totals:</b>	<b>\$0.00</b>	<b>\$15,000.00</b>	<b>\$5,000.00</b>	<b>(\$20,000.00)</b>	<b>\$33,193.54</b>	<b>(\$28,193.54)</b>
<b>Department: 01 Mayor / Council name totals:</b>	<b>\$0.00</b>	<b>\$15,000.00</b>	<b>\$5,000.00</b>	<b>(\$20,000.00)</b>	<b>\$33,193.54</b>	<b>(\$28,193.54)</b>
<b>Department: 04 Administration</b>						
<b>Division: 05 Administrative Services</b>						
6206 Operating Supplies	\$0.00	\$0.00	\$2,200.00	(\$2,200.00)	\$58,475.04	(\$56,275.04)
<b>Division: 05 Administrative Services totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,200.00</b>	<b>(\$2,200.00)</b>	<b>\$58,475.04</b>	<b>(\$56,275.04)</b>
<b>Department: 04 Administration totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,200.00</b>	<b>(\$2,200.00)</b>	<b>\$58,475.04</b>	<b>(\$56,275.04)</b>
<b>Department: 15 Finance</b>						
<b>Division: 17 Assessing</b>						
6206 Operating Supplies	\$0.00	\$0.00	\$90,000.00	(\$90,000.00)	\$90,579.84	(\$579.84)
<b>Division: 17 Assessing totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$90,000.00</b>	<b>(\$90,000.00)</b>	<b>\$90,579.84</b>	<b>(\$579.84)</b>
<b>Department: 15 Finance totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$90,000.00</b>	<b>(\$90,000.00)</b>	<b>\$90,579.84</b>	<b>(\$579.84)</b>
<b>Fund Totals: General Test</b>	<b>\$0.00</b>	<b>\$188,308.24</b>	<b>(\$499,830,891.00)</b>	<b>\$499,642,582.76</b>	<b>\$1,123,126,016.05</b>	<b>(\$1,622,956,907.05)</b>
<b>Grand Totals:</b>	<b>\$0.00</b>	<b>\$188,308.24</b>	<b>(\$499,830,891.00)</b>	<b>\$499,642,582.76</b>	<b>\$1,123,126,016.05</b>	<b>(\$1,622,956,907.05)</b>

## Detail Purchase Order Encumbrance Reconciliation Report

Budget Balances: Annual    Prior Year Purchase Orders: Include

Report as of Date: 12/31/2023

		Amended Budget	YTD Expenses	YTD G/L Encumbrances	Budget - YTD Exp/Enc	YTD PO Encumbrances	Encumbrance Difference
<b>Fund: 101 General Test</b>							
<b>Department: No Department Assigned</b>							
1234 Dummy Account		\$0.00	\$104,598.00	\$62,760.00	(\$167,358.00)	\$22,426,750.27	(\$22,363,990.27)
Purchase Order	G/L Date	Item Description	Item Amount	Distribution	Expensed	Encumbered	
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$100.00	100.00%	\$0.00	\$100.00	
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00	
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00	
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00	
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00	

Total Encumbrance for each g/l account number is detailed by the open POs.

**Encumbrance Balances to Open POs**

# Purchase Order numbers are clickable for access to Purchase Order Inquiry

Send to myReports

NWERP 2021.1

## Detail Purchase Order Encumbrance Reconciliation Report

Budget Balances: Annual    Prior Year Purchase Orders: Include  
Report as of Date: 5/5/2024

	Amended Budget	YTD Expenses	YTD G/L Encumbrances	Budget - YTD Exp/Enc	YTD PO Encumbrances	Encumbrance Difference
<b>Fund: 101 General Test</b>						
<b>Department: No Department Assigned</b>						
1234 Dummy Account	\$100.00					
Purchase Order	G/L Date	Item Description				
2020-00000022	3/4/2020	Bridges & trails				
2020-00000023	3/4/2020	1 inventory item				
2020-00000033	3/12/2020	39				
2020-00000039	3/23/2020	Item A				
2022-00000024	3/22/2022	Item 1 Not Inventory				
2022-00000024	3/22/2022	Item 1 Not Inventory				
2022-00000024	3/22/2022	Item 1 Not Inventory				
2020-00000052	5/7/2020	Item A	\$21.8			
2020-00000056	5/22/2020	Item A				
2020-00000059	6/4/2020	Item 1 Not Inventory				
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO				
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO				
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO				
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00
2020-00000058	6/3/2020	Item 1 Not Inventory - Here's a really long description to extend the length of the PO	\$1,000.00	100.00%	\$0.00	\$1,000.00

new world ERP - Google Chrome

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**General** ▾

**General** 📎

Department **Finance.Financial Services**

Vendor **1 - A & M BUSINESS INTERIOR SERVICE , Name Changed Again**

Status **Open**

Contact Name **Boris Pavlovic**

Purchasing Address **123 Main Stt**

**Second Line**

**Third Line**

City **TROY**

State **MI**

Zip Code **48098**



The Open Purchase Orders should balance to the G/L encumbered amounts by G/L accounts.

**Encumbrance  
Balances to  
Open POs**



## Balancing Accounts Payable to General Ledger

### Reports to Run

#### Accounts Payable Sub-Ledger Reports

- Accounts Payable Invoice Aging Report
- Accounts Payable Invoice Report (Open Invoices)

#### General Ledger Reports

- Crossfund G/L Reports
- Other Balance Sheet Reports

Balancing AP to  
G/L

# Accounts Payable Invoice Aging Report:

- 1- Report through the period end date
- 2- Report By: A/P Account – Invoice
- 3- Include Voided Invoices

new world  
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maint

### Accounts Payable Invoice Aging Report

Load Saved Report: [dropdown]  
Override Report Title: [text]  
Distribution Group: [text]  
Email Group: [text]

Report through Date: 03/31/2017  
Date Type: G/L Date  
Report By: A/P Account - Invoice  
Include Voided Invoices:

Departments: [dropdown] Bank Accounts: [dropdown]

Available Bank Account(s): 0  
Selected Bank Account(s): 15

- 11 - test delete
- 123 - Test
- 1234 - Test Bank
- CD Agency - CD Agency Leave
- CD Block Grant - CD Block Grant
- Ck 75 - Checking account 75
- CLB - Contractors Licensing
- Economic Dev - Economic Development
- Operating - Operating Fund - Old
- Payroll - Payroll Fund
- Payroll CV - Payroll Checking Gen

Print Reset Save Save As Delete

The total for all open invoices should match the cross-fund report for the default accounts payable account accrual balance.

**Balancing AP to G/L**

The invoice numbers on the Invoice Aging Report and Open Invoice Report will access the Inquiry page for each.

### Accounts Payable Invoice Aging Report

Through Invoice Date 05/05/24  
Report By A/P Account - Invoice

Invoice Number	Over 90	61 - 90 days	31 - 60 Days	Past Due
<b>A/P Account 101.2002 - Accounts Payable</b>				
Vendor Temporary - RENOVATE REMODELING LLC, KAREN				
11/18	35.00			
Vendor Temporary - RENOVATE REMODELING LLC, KAREN Totals	\$35.00	\$0.00	\$0.00	
Vendor 1 - A & M BUSINESS INTERIOR SERVICE, Name Changed Again				
2019-00000381	1.00			
2019-00000383	1.00			
2020-00000071	.57			
2020-00000107	1.00			
2020-00000108	55.00			
2020-00000125	12,000.00			
Vendor 1 - A & M BUSINESS INTERIOR SERVICE, Name Changed Again Totals	\$12,058.57	\$0.00	\$0.00	
Vendor 2 - CITY OF APPLE VALLEY				
2019-00000442	1.00			
2020-00000082	1.00			
1121	100.00			
2021-00000253	1,222.00			
2022-00000151	1.00			
2022-00000152	1.00			
2022-00000153	1.00			
2022-00000154	1.00			
2022-00000155	1.00			
2022-00000156	1.00			
2022-00000157	1.00			
2022-00000158	1.00			
2022-00000159	1.00			
2022-00000160	1.00			
2022-00000161	1.00			

new world ERP - Google Chrome

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#### Invoice 2019-00000381 ✓

<b>Invoice Batch</b>		<b>Payment Information</b>	
Batch Department	FIN_FIN - Finance_Financial Services	Bank Account	Operating
Batch Date	07/22/2019	Payment Type	
Batch Number	2019-00000518	Payment Number	
Batch Description	Global Search for Open AP Invoice	Payment Date	
Created by User	nws	Confirming EFT	
<b>Invoice</b>		Manual Check	
Status	Open	Check Sort Code	
Invoice Department	FIN_FIN - Finance_Financial Services	Check Code	
Invoice Number	2019-00000381	<b>Remittance Information</b>	
Invoice Description	Global Search for Open AP Invoices	Vendor	1 - A & M BUSINESS INTERIOR SE
Invoice Date	07/22/2019	Contact Name	Boris Pavlovic
Due Date	07/22/2019	Description	
G/L Date	07/22/2019	Address	123 Main Stt
Received Date			Second Line
Terms			Third Line
Hold Payment Reason			TROY, MI 48098

# Balancing Open A/R Invoices to General Ledger

## Reports to Run:

### Miscellaneous Billing

- Open Invoice Report
- G/L Distribution Report

### General Ledger

- Cross Fund Report
- Other balance Sheet Reports – *e.g.- Detail General Ledger Report*

Balancing AR to  
G/L



# Balancing Open A/R Invoices to General Ledger

## Miscellaneous Billing Open Invoice Report

Select the Report through date  
Select relevant criteria from tabs.

Miscellaneous Billing Open Invoice Report

Load Saved Report: [Dropdown]      Distribution Group: [Dropdown]

Override Report Title: [Text]      Email Group: [Dropdown]

Report Date: 12/31/2023 [Calendar]      Report By: A/R Account - Invoice

Use Date Type: Transaction Date [Dropdown]      Include Billing Code Detail:

Select Single Customer:

Customer: [Dropdown]

---

Departments ✓   Invoice Types ✓   Customer Types ✓   **Customer Categories ✓**

Available Customer Categories: 0

Selected Customer Categories: 1  
[Unspecified]

Print   Reset   Save   Save As   Delete

Balancing AR to  
General Ledger

# Balancing Open A/R Invoices to General Ledger

## MB Open Invoice Report

Miscellaneous Billing

As of 12/31/23

Report By Accounts Receivable Account - Invoice

Invoice	Customer	Invoice Date	G/L Date	Due Date	Resolution Date	Invoice Amount	Late Fees	Finance Charges	Payments	Balance
V/R Account 101.1300.01 - Accounts Receivable Miscellaneous Billing										
023-00000003	1 - GENERAL SHEET METAL CO LLC, BRENDA	01/13/2023	01/13/2023	02/10/2023		1.00	.00	.00		1.00
023-00000003	2 - PUCK HOGS - KEVIN BORER,	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000004	3 - 1ST LINE/LEEWE VENTURES, LLC, ROSANNE	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000004	7794 - 001 Mahoney, Sam	04/24/2023	04/24/2023	05/24/2023		1,083.75	.00	.00		1,083.75
023-00000005	2 - PUCK HOGS - KEVIN BORER,	04/20/2023	04/20/2023	04/20/2023		1.00	.00	.00		1.00
023-00000007	1 - GENERAL SHEET METAL CO LLC, BRENDA	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000008	2 - PUCK HOGS - KEVIN BORER,	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000009	3 - 1ST LINE/LEEWE VENTURES, LLC, ROSANNE	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000010	1 - GENERAL SHEET METAL CO LLC, BRENDA	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000011	2 - PUCK HOGS - KEVIN BORER,	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000012	3 - 1ST LINE/LEEWE VENTURES, LLC, ROSANNE	06/26/2023	06/26/2023	06/26/2023		1.00	.00	.00		1.00
023-00000013	1 - GENERAL SHEET METAL CO LLC, BRENDA	06/27/2023	06/27/2023	06/27/2023		30.00	.00	.00		30.00
023-00000014	35 - VIKING INDUSTRIAL CENTER, JAMES T	06/29/2023	06/29/2023	06/29/2023		1.00	.00	.00		1.00
023-00000025	5 - CITY OF OSSEO,	10/19/2023	10/19/2023	10/31/2023		2,000.00	.00	.00		2,000.00
023-00000026	7802 - NSF Customer 1,	12/01/2023	12/01/2023	12/31/2023		3.00	.00	.00		3.00
MP-26	338 - HOLIDAY GAS,	09/18/2019	09/27/2019	09/27/2019		15.00	.90	.00		15.90
MP-98	26 - PARK CENTER HIGH SCHOOL,	07/01/2021	07/01/2021	08/01/2021		100.00	.00	.00		100.00
MP-99	26 - PARK CENTER HIGH SCHOOL,	07/01/2021	07/01/2021	08/01/2021		100.00	.00	.00		100.00
A/R Account 101.1300.01 - Accounts Receivable Miscellaneous Billing Totals		G/L Balance as of 12/31/23			\$157,006.75	\$1,141,509.31	\$132.90	\$0.00		\$1,141,642.11

V/R Account 101.1400 - Due from Other Governments

Note that this will show totals by account by fund. If different A/R accounts are used, consider running this report by Invoice type if the Invoice Type correlates to a default A/R account

or

Run the Miscellaneous Billing by G/L Distribution Report.

**Balancing AR to General Ledger**

## Balancing Open A/R Invoices to General Ledger

Balance the Accounts Receivable balance to the general ledger using the Cross Fund Report or the Detail General Ledger Report.

The Accounts Receivable balance should balance by period by account.

**Balancing MB to  
G/L**







Creating Report Templates

## Saving Report Templates

When is this useful?

- When recreating reports with specific search criteria. This allows the standardization of the report's results and saves time.
- When an upper-level manager would like others to use a standardized format. They can share the template with all other users.
  - For example – Budget worksheet report during annual budget process.

# Saving Report Templates

How do I save a template for later use?

**Budget Performance Report**

Load Saved Report  Distribution Group

Override Report Title  Email Group

---

Report Option: Fiscal-Year-to-Date  Organization Level Usage: Summarize to

Report from Date: 04/27/2023 Organization Level: Department

Report to Date: 04/27/2024 Prior Year Balances: Year-to-Date

Budget Balances: Year-to-Date  Page Break Level: Department

Account Type: Expense  Include Accounts With Zero Balances:

Sort by Account Type:  Prior Fiscal Year Activity: Include

Subtotal by Classification: 1  Rollup Account: Exclude

Include Unposted Transactions:

---

Organizations  Accounts  **Account Classifications**

Available Account Classification(s): 0

Selected Account Classification(s): 27

- Expense Classification 1 - 1 - - - Position Budgeting
- Expense Classification 1 - 10 - INS - Insurance
- Expense Classification 1 - 11 - UTIL - Utilities
- Expense Classification 1 - 12 - COS - Cost of sales
- Expense Classification 1 - 13 - CONF - Conferences and sch
- Expense Classification 1 - 14 - DUES - Dues and subscriptio
- Expense Classification 1 - 15 - OTH - Other charges
- Expense Classification 1 - 16 - Social Svcs - Social Svcs
- Expense Classification 1 - 17 - CON - Contingency
- Expense Classification 1 - 18 - GFC - General Fund Charges
- Expense Classification 1 - 19 - CG - Central garage

**Print** **Schedule** **Reset** **Save** **Save As** **Delete**

# Saving Report Templates

**Budget Performance Report**

Load Saved Report  Distribution Group

Override Report Title  Email Group

---

Report Option: Fiscal-Year-to-Date  Organization Level Usage: Summarize to

Report from Date: 04/27/2023 Organization Level: Department

Report to Date: 04/27/2024 Prior Year Balances: Year-to-Date

Budget Balances: Year-to-Date  Page Break Level: Department

Account Type: Expense  Include Accounts With Zero Balances:

Sort by Account Type:  Prior Fiscal Year Activity: Include

Subtotal by Classification: 1  Rollup Account: Exclude

Include Unposted Transactions:

---

Organizations  Accounts  Account Classifications

Available Account Classification(s): 0

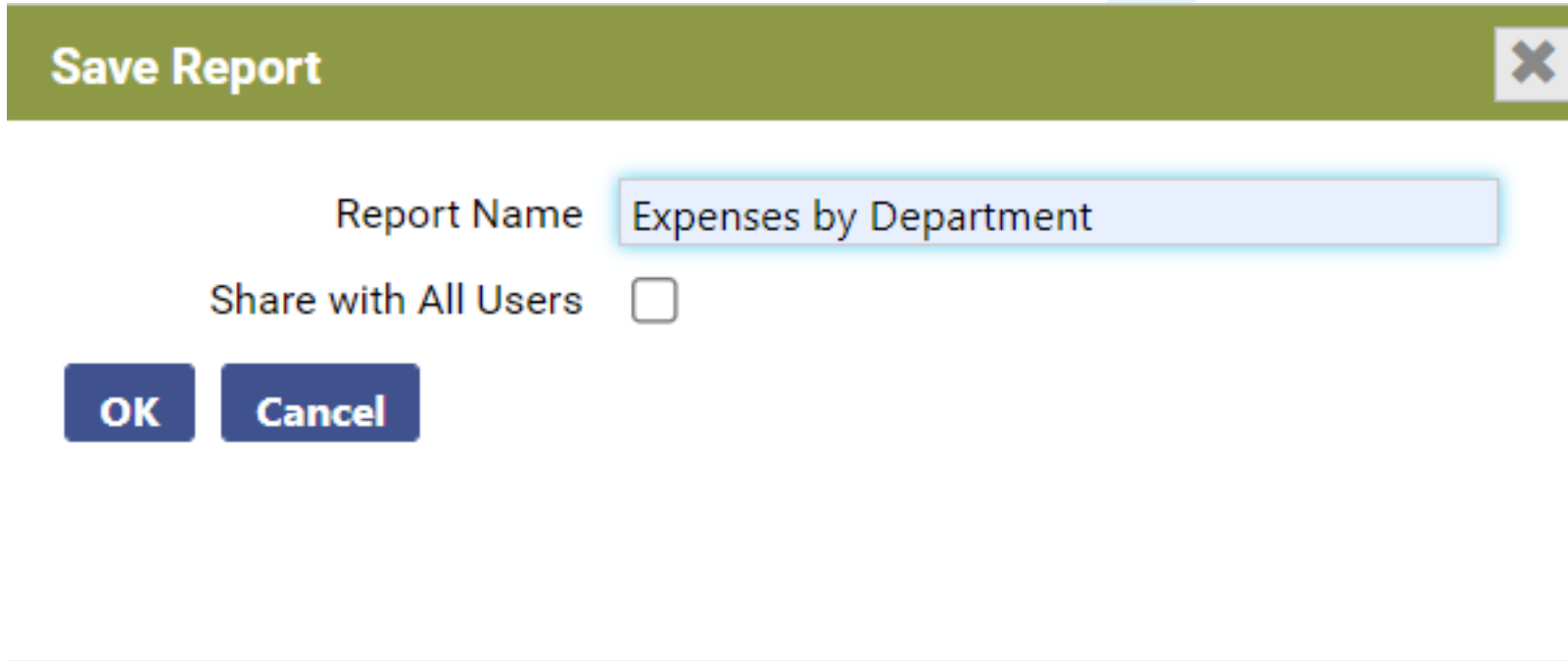
Selected Account Classification(s): 27

- Expense Classification 1 - 1 - - - Position Budgeting
- Expense Classification 1 - 10 - INS - Insurance
- Expense Classification 1 - 11 - UTIL - Utilities
- Expense Classification 1 - 12 - COS - Cost of sales
- Expense Classification 1 - 13 - CONF - Conferences and sch
- Expense Classification 1 - 14 - DUES - Dues and subscription
- Expense Classification 1 - 15 - OTH - Other charges
- Expense Classification 1 - 16 - Social Svcs - Social Svcs
- Expense Classification 1 - 17 - CON - Contingency
- Expense Classification 1 - 18 - GFC - General Fund Charges
- Expense Classification 1 - 19 - CG - Central garage

Print Schedule Reset Save **Save As** Delete

Set up the report criteria and click *<Save As>*. This will add the report's layout to the Load Saved Report field.

## Saving Report Templates

A dialog box titled "Save Report" with a close button (X) in the top right corner. It contains a text input field for "Report Name" with the value "Expenses by Department", a checkbox for "Share with All Users" which is currently unchecked, and two buttons: "OK" and "Cancel".

**Save Report** [X]

Report Name

Share with All Users

**OK** **Cancel**

- Name the report.
- If sharing out the template to all users, click the Share with All Users.

## Saving Report Templates

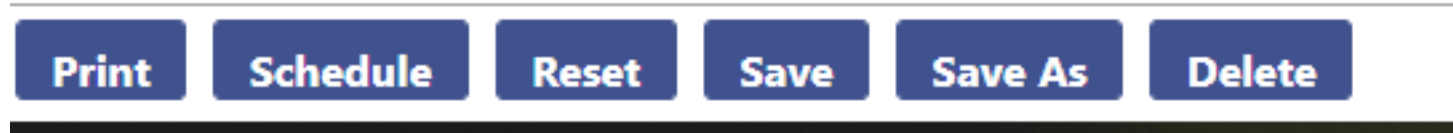
### Budget Performance Report

Load Saved Report	<input type="text" value="Expenses by Department"/>	Distribution Group	<input type="text"/>
Override Report Title	<input type="text" value="EXPENSES BY DEPARTMENT"/>	Email Group	<input type="text"/>
Start Date	<input type="text" value="Fiscal Year to Date"/>	Organization Level Users	<input type="text" value="Superusers"/>

Note that if you plan to distribute the report using the Distribution Group field, add an Override Report Title that will stand out in My Reports.

\*As an aside: Any time you want to create a distribution group for secure notes in the system, you will need to come to a report page like this and create it.\*

## Saving Report Templates



*<Print>* – Generates the report

*<Schedule>* – If present, allows the report to be scheduled for automatic creation.

*<Reset>* – Wipes out changes since last *<Save>*

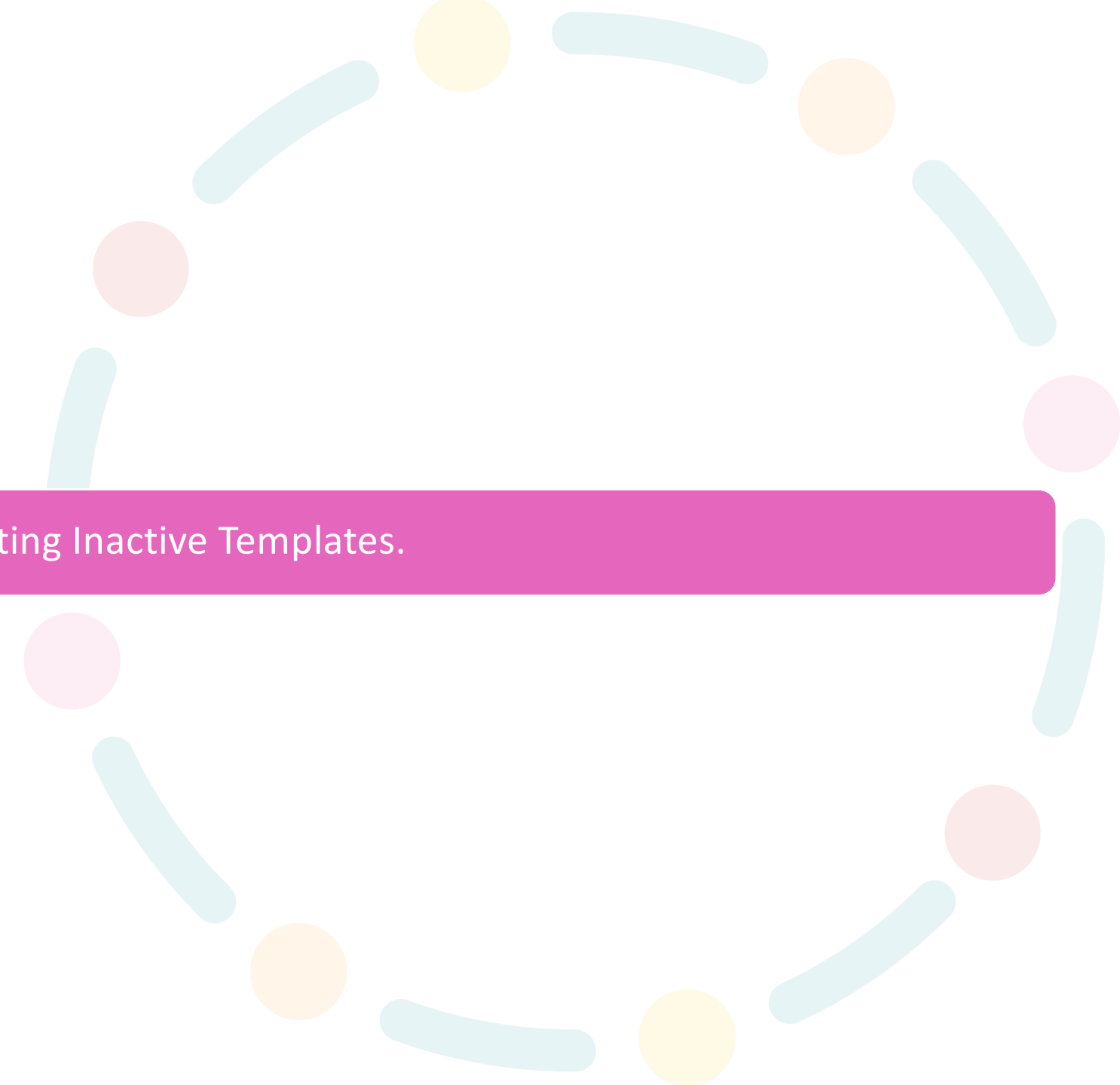
*<Save>* – Saves changes made to the template.

*<Save As>* – Creates a new template under Load Saved Report.

*<Delete>* – Removes the template from the list of saved templates.

\*\*

Deleting Inactive Templates.





## General Ledger Listing

Load Saved Report

Distribution Group

Override Report Title

Email Group

From Date

Include Accounts with No Activity

To Date

Sub Ledger Detail

Report Detail

Page Break Level

Prior Fiscal Year Activity

Organizations

Accounts

Sub Ledgers

Fund  Department  Division  Program  Sub-Program  test category

Available Organization(s): 98

101-01-01-1070-101-Test - General Test, Mayor / Council name  
101-01-01-1072 - General Test, Mayor / Council name, Legislative  
101-01-01-1077 - General Test, Mayor / Council name, Legislative  
101-01-05 - General Test, Mayor / Council name, Administration  
101-01-22 - General Test, Mayor / Council name, Property Services  
101-02 - General Test, test 2nd level org  
101-02-02 - General Test, test 2nd level org, Commissions  
101-04 -05-1901 - General Test, Administration, Administrative Services  
101-04 -11-1072 - General Test, Administration, Elections, Community  
101-04 -91 - General Test, Administration, Brooklyn Programs  
101-04 -93 - General Test, Administration, Brooklyn Bridge

Selected Organization(s): 508

101 - General Test  
101-01 - General Test, Mayor / Council name  
101-01-01 - General Test, Mayor / Council name, Legislative  
101-01-02 - General Test, Mayor / Council name, Commissions  
101-04 - General Test, Administration  
101-04 -05 - General Test, Administration, Administrative Services  
101-04 -06 - General Test, Administration, City Clerk  
101-04 -07 - General Test, Administration, Community Outreach  
101-04 -07-1070 - General Test, Administration, Community  
101-04 -07-1072 - General Test, Administration, Community  
101-04 -07-1076 - General Test, Administration, Community

Print

Reset

Save

Save As

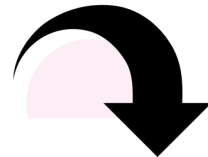
Delete

Templates can be selectively removed when no longer needed.

This just in.....



Shared Report Templates left over from inactive users can now be removed by going to **Maintenance > new world ERP Suite > System > System Settings** and checking the box “Hide Inactive User Shared Reports”



### Saved Reports

---

Hide Inactive User Shared Reports

A decorative circular pattern composed of colored dots and teal dashes. The dots are in shades of yellow, orange, pink, and light blue, arranged in a circle. The teal dashes are curved and connect the dots, forming a ring around the central text.

Adding pages to favorites

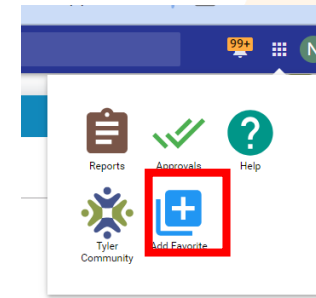
## Adding Pages to MyFavorites

### ? — Why use the MyFavorites shortcut?

- Adding pages to MyFavorites eliminates search time when navigating to pages not frequently used.
- Allows you to create a list of pages most often accessed.
- It is editable to update a page's title and the order it is displayed.

## Adding Pages to MyFavorites

Under the 9-dot at the top right, locate the Add Favorite icon.



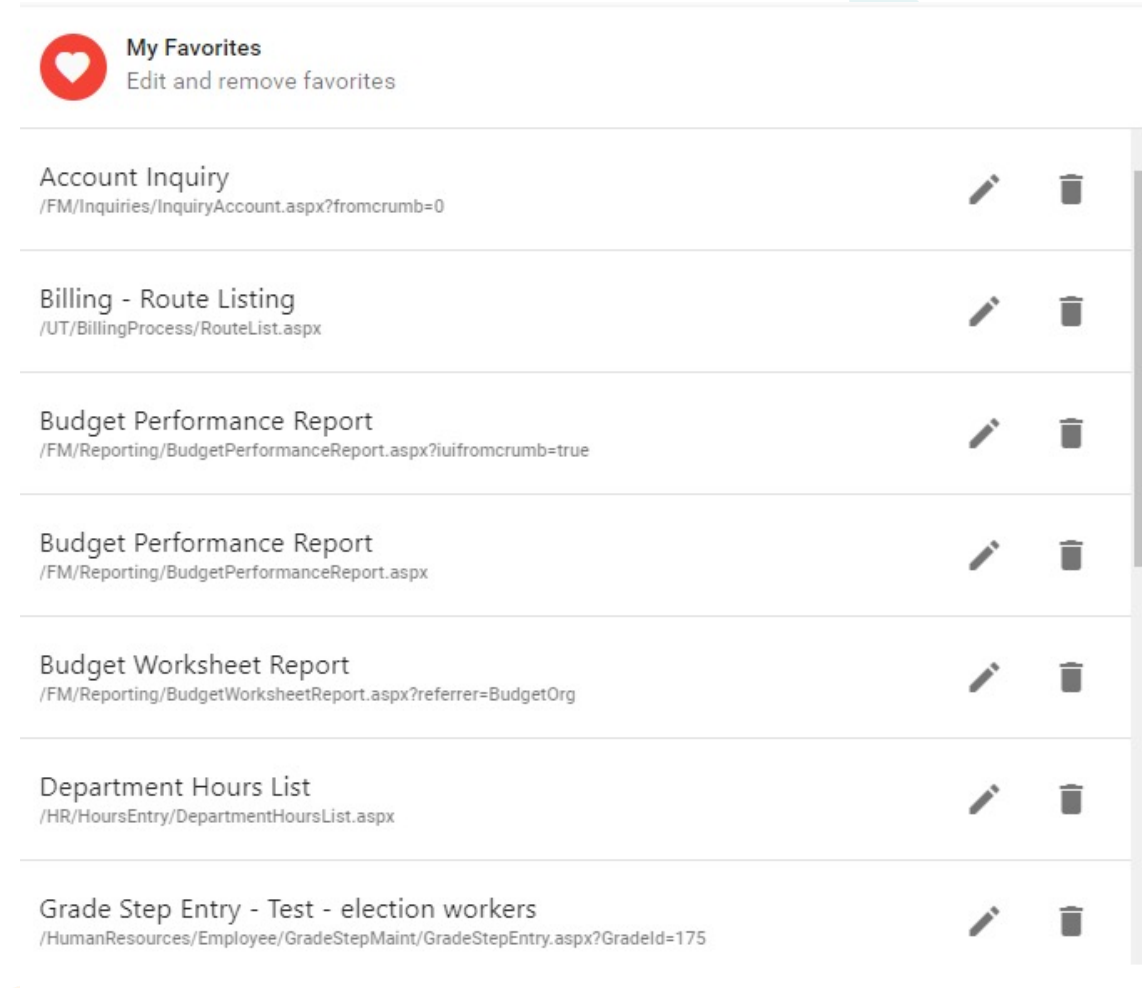
The page you are on will be saved under My Favorites. Navigate to the home page to update this list.

## Adding Pages to MyFavorites

To Edit: Go to My Settings under your username avatar.

Scroll down to My Favorites.

Here you will be able to view, edit and delete your shortcuts.



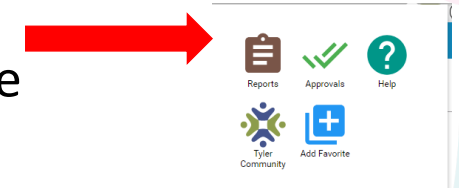
Favorite Name	URL	Edit Icon	Delete Icon
Account Inquiry	/FM/Inquiries/InquiryAccount.aspx?fromcrumb=0	✎	🗑️
Billing - Route Listing	/UT/BillingProcess/RouteList.aspx	✎	🗑️
Budget Performance Report	/FM/Reporting/BudgetPerformanceReport.aspx?iuifromcrumb=true	✎	🗑️
Budget Performance Report	/FM/Reporting/BudgetPerformanceReport.aspx	✎	🗑️
Budget Worksheet Report	/FM/Reporting/BudgetWorksheetReport.aspx?referrer=BudgetOrg	✎	🗑️
Department Hours List	/HR/HoursEntry/DepartmentHoursList.aspx	✎	🗑️
Grade Step Entry - Test - election workers	/HumanResources/Employee/GradeStepMaint/GradeStepEntry.aspx?Gradelid=175	✎	🗑️

## Adding Pages to MyFavorites



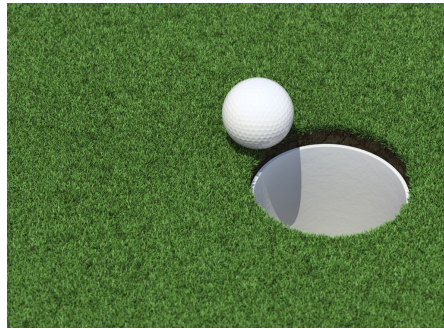
Let's leverage MyFavorites to save time and keystrokes when using a saved report layout:

- Add the desired report page to Favorites using the Add Favorites icon.
- Also add MyReports to MyFavorites with the Add Favorites icon..
- This will allow you to shortcut to the report page, select the desired template and print it.
- To print the report, you can simply go to My Favorites to access MyReports.



# Adding Pages to MyFavorites

PRO TIP:



Preface the **MyReports** shortcut with Z (under **My Settings**) to ensure it is always at the bottom of the list, and easily accessible.

**NWERP 2021.1** Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

- Account Inquiry
- Billing - Route Listing
- Budget Performance Report
- Budget Performance Report
- Budget Worksheet Report
- Department Hours List
- Grade Step Entry - Test - election workers
- Life Events Settings
- Open Payment Report
- Payroll Manager ( 202021SH-B ) - Departmental Hours List
- Search Index
- Work Order Listing
- Z myReports**

Subtotal by Classification 1

Organization Level Usage Summarize to

Organization Level Department

Prior Year Balances Year-to-Date

Page Break Level Department

Include Accounts With Zero Balances

Prior Fiscal Year Activity Include

Rollup Account Exclude

Include Unposted Transactions

Organizations Accounts Account Classifications

Fund Department Division Program Sub-Program test category

Available Organization(s): 370

- 102 - July Fund
- 103 - Demo Bad PO Soft Close
- 104 - Demo Asset With # Symbol
- 104-01 - Demo Asset With # Symbol, Mayor / Council name
- 104-02 - Demo Asset With # Symbol, test 2nd level org
- 104-03 - Demo Asset With # Symbol, test
- 1101 - Test Fund
- 1101-04 -05 - Test Fund, Administration, Administrative Se
- 1102 - New Fund
- 1103 - Another New Fund
- 1104 - test

Selected Organization(s): 236

- 101 - General Test
- 101-01 - General Test, Mayor / Council name
- 101-01-01 - General Test, Mayor / Council name, Legislativ
- 101-01-01-1070-101-Test - General Test, Mayor / Council
- 101-01-01-1072 - General Test, Mayor / Council name, Le
- 101-01-01-1077 - General Test, Mayor / Council name, Le
- 101-01-02 - General Test, Mayor / Council name, Commis
- 101-01-05 - General Test, Mayor / Council name, Administ
- 101-01-22 - General Test, Mayor / Council name, Property
- 101-02 - General Test, test 2nd level org
- 101-02-02 - General Test, test 2nd level org, Commissions

Print Schedule Reset Save Save As Delete



Notification manager





Welcome to new world ERP - nws

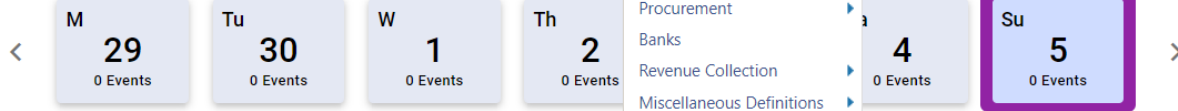
0  
CALENDAR

224  
NOTIFICATIONS

8  
APPROVALS


50  
REPORTS

Calendar






- new world ERP Suite
- Financial Management
- Human Resources
- Utility Management
- Community Development
- About new world ERP
- Security
- System
- Process Manager
- Approval Manager
- Notifications
  - Notification Manager
  - Notification Administration
- Chart of Accounts
- Procurement
- Banks
- Revenue Collection
- Miscellaneous Definitions
- Arc GIS Server Setup
- Address Certification











ADD A NEW EVENT

 **NWERP 2021.1**

myFavorites | Financial Management | Human Resources | U

### Notification Manager

   | Process

Process Name	
+	 Contains...
+	 Contract Amendment
+	 Contract Preparation
+	 Employee Status
+	 Journal Import
+	 Permits
+	 Receipt Of Goods
+	 Request for Action
+	 Vendor Change Request
+	 Work Orders

Allows users to be notified of activity in any of these processes.



NWERP 2021.1 Search

myFavorites | Financial Management | Human Resou

### Notification Manager

Process

Contains...

- + Contract Amendment
- + Contract Preparation
- + Employee Status
- + Journal Import
- + Permits
- + Receipt Of Goods
- + Request for Action
- + Vendor Change Request
- + Work Orders

Add Rule Delete Rule Refresh

Step 1 – click on the process you want to create an event for.



Step 2 – select the priority assigned to the notification. (val set 307)

Notification Manager Process Maintenance - Contract Amendment

Priority Standard - Standard

Events Criteria

Available Event(s): 1  
Contract Amended

Selected Event(s): 0

Save Reset Close



Step 3 – Select the Event(s) that will trigger the notification.

Notification Manager Process Maintenance - Contract Amendment

Priority: Standard - Standard

Events | Criteria

Available Event(s): 1

Contract Amended

Selected Events(s): 0

Save Reset Close

Step 4 – Select the Criteria that will be associated with the Event.

Click <Save>, then <Close>

Notification Manager Process Maintenance - Contract Amendment

Priority: Standard - Standard

Events | Criteria

Available Criteria: 2

Contract Authorized Department  
Contract Type

Selected Criteria: 1

Amendment Action

Save Reset Close

Next, add a rule by clicking <Add Rule>

The screenshot shows the NWERP 2021.1 Notification Manager interface. At the top, there is a dark blue header with the NWERP logo and the text "NWERP 2021.1". To the right of the header is a search bar with the text "Search". Below the header is a navigation bar with links for "myFavorites", "Financial Management", "Human Resources", "Utility Management", and "C". The main content area is titled "Notification Manager" and has a sub-header "Process" with three icons. Below this is a list of notification rules, each with a plus sign and an icon. The rules are: "Contract Amendment", "Contract Preparation", "Employee Status", "Journal Import", "Permits", "Receipt Of Goods", "Request for Action", "Vendor Change Request", and "Work Orders". At the bottom of the interface, there are three buttons: "Add Rule", "Delete Rule", and "Refresh". The "Add Rule" button is highlighted with a black box.

In the popup window, type the **Rule Name** and the **Description**

Lastly, select the Event(s), Users to be notified, Employees or create an email distribution.

Click <Save>

Notification Manager Rule Entry

Rule Name: Complete

Description: Notification of Contract Completion

Events | Criteria | Users | Employees | **Email Addresses**

Entered Email Addresses:

- andrew.dayton@tylertech.com

Email Address Maintenance

Email Address:  Add Update Delete

Save Save/New Reset Close

Contract was completed and the notification was immediately routed to my homepage Notifications tile.

The screenshot displays the NWERP 2021.1 user interface. At the top, there is a dark blue header with the logo, the text "NWERP 2021.1", a search bar, and a notification bell icon showing "99+" alerts. Below the header is a navigation bar with links for "myFavorites", "Financial Management", "Human Resources", "Utility Management", "Community Development", and "Maintenance". A blue banner below the navigation bar reads "Welcome to new world ERP - nws".


On the left side, there is a vertical sidebar with four main tiles: "CALENDAR" (0 items), "NOTIFICATIONS" (224 items), "APPROVALS" (8 items), and "REPORTS" (50 items). The "NOTIFICATIONS" tile is highlighted in red.

The main content area is titled "Notifications" and contains a list of notification items. The first item, "Contract Amendment", is highlighted with a red border. It includes a message: "Contract 2020-0000006 was amended." Below this, there are three more items, each with a "Contract Amendment" title and a message: "Contract 2020-0000017 was amended." Each item also displays "Notification Date" and "Priority".

Notification Title	Message	Notification Date	Priority
Contract Amendment	Contract 2020-0000006 was amended.		
Contract Amendment	Contract 2020-0000017 was amended.	05/05/2024	Standard
Employee Status	Dog, Doodle (3469) employee status changed to 'Inactive' effective on 4/28/2024 in department Comm Dev/Development Services/Economic Development.	05/02/2024	Standard
Employee Status	Buttski, Abbie D (3409) employee status changed to 'Inactive' effective on 4/26/2024 in department Rec/Recreation Administration.		



Don't forget to set your notifications options under My Settings.



### Email Notification Options

Change email and notification settings

---

Email Address  
nws@testemail.com [RESET TID PASSWORD](#)

---

#### Approvals

- Always Notify
- Daily Notify
- None

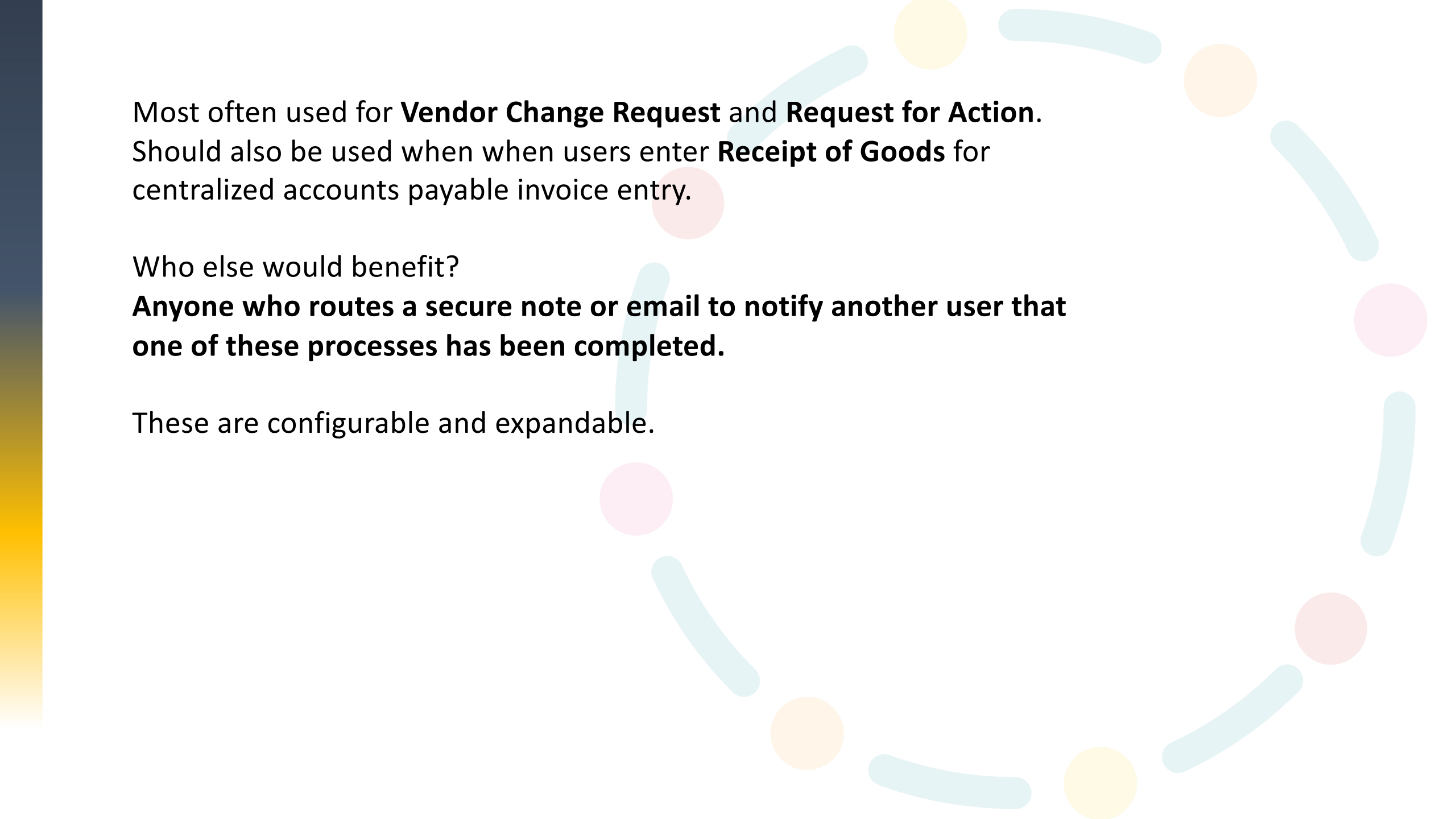
#### Notes

- Always Notify
- Daily Notify
- None

#### Notifications

- Always Notify
- Daily Notify
- None

[CANCEL](#) [SAVE](#)



Most often used for **Vendor Change Request** and **Request for Action**.  
Should also be used when users enter **Receipt of Goods** for centralized accounts payable invoice entry.

Who else would benefit?

**Anyone who routes a secure note or email to notify another user that one of these processes has been completed.**

These are configurable and expandable.


# Search Grid Headers








Status	Bank Account	Type	Number	Payment Date	Reconciled
--------	--------------	------	--------	--------------	------------










myTasks	Validated	Approvals	Delivery	Department	P.O. Number
---------	-----------	-----------	----------	------------	-------------

my Tasks	Validated	Approvals	Department	Batch Number
----------	-----------	-----------	------------	--------------

Item	Active	On Hand	Issue U/M	Avg. Cost/Unit
------	--------	---------	-----------	----------------



						
Hide	Column Chooser	Sort on Multiple	Move To ▼	Toggle Group By	Export	Grid State ▼

								
<b>Hide Filter</b>	Hide	Column Chooser	Sort on Multiple	Advanced Filter	Move To ▼	Toggle Group By	Export	Grid State ▼

Hide Filter   Hide   Column Chooser   Sort on Multiple   Advanced Filter   Move To   Toggle Group By   Export   Grid State

Purchase Order List   Show Search

List

myTasks	Validated	Approvals	Delivery	Department	P.O. Number	Type	Description
▽	▽	▽  Contains...		▽  Contains...	▽  Contains...	▽  Contains...	▽  Contains...
	✗	0 of 1 at 1		ENG_ENG - Eng - Bldg.Engineering	Edit	Standard	test

Hide Filter   **Hide**   Column Chooser   Sort on Multiple   Advanced Filter   Move To   Toggle Group By   Export   Grid State

Purchase Order List

Show Search

myTasks   Validated   Approvals   Delivery   Department   P.O. Number   Type   Description

myTasks	Validated	Approvals	Delivery	Department	P.O. Number	Type	Description
▼	▼	▼   Contains...		▼   Contains...	▼   Contains...	▼   Contains...	▼   Contains...

Hide Filter | Hide | **Column Chooser** | Sort on Multiple | Advanced Filter | Move To | Toggle Group By | Export | Grid State

Purchase Order List Show Search

myTasks Validated Approvals Delivery Department P.O. Number Type Description

myTasks	Validated	Approvals	Delivery	Department	P.O. Number	Type	Description
▼	▼	▼  Contains...		▼  Contains...	▼  Contains...	▼  Contains...	▼  Contains...

### Column Chooser

Hide	myTasks
Hide	Validated
Hide	Approvals
Hide	Delivery
Hide	Department
Hide	P.O. Number
Hide	Type
Hide	Description
Show	Vendor
Show	Amount
Show	Assigned to Buyer
Hide	Attachments

**Apply** **Cancel**

Column Chooser allows you to select the columns to hide/show.





Hide Filter



Hide



Column  
Chooser



Sort on  
Multiple



Advanced  
Filter



Move To  
▼



Toggle  
Group By



Export



Grid State  
▼

**Sort on Multiple** Reset

↓ Approvals ✕

Sort by myTasks

Sort by Validated

Sort by Department

Sort by P.O. Number

Sort by Type

Sort by Description

Sort by Attachments

Sort by Vendor

Sort by Amount

Sort by Assigned to Buyer

**Apply** **Cancel**

The X to the right will remove the sort for that column.

Clicking Sort by will allow that field to be sorted.

myTasks	Validated	Approvals	Delivery	Department	P.O. Number	Type	Description
▼	▼	▼  Contains...		▼  Contains...	▼  Contains...	▼  Contains...	▼  Contains...



## Sort on Multiple

Reset



Approvals



Validated



Department



P.O. Number



Type



Sort by

myTasks

Sort by

Description

The column sorting tool can be removed easily with the **Sort on Multiple** Feature.



Hide Filter



Hide



Column  
Chooser



Sort on  
Multiple



Advanced  
Filter



Move To  
▼



Toggle  
Group By



Export



Grid State  
▼

## ADVANCED FILTER



Show records matching  of the following criteria

Add

Clear ALL

Department

Starts with

Starts with

Ends with

Contains

Does not contain

Equals

Does not equal

Search

Cancel

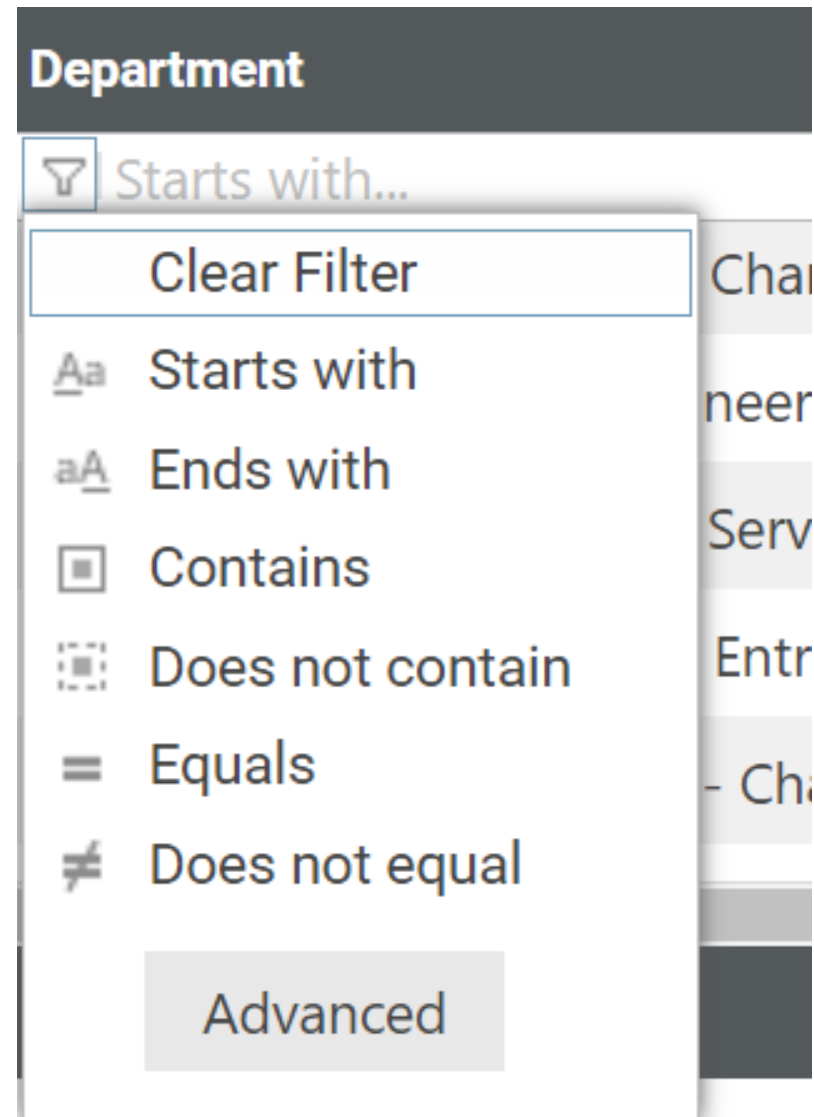


Prev

1

2

Alternatively, you can select the filter icon in the filter row to create a filter.



Hide Filter | Hide | Column Chooser | Sort on Multiple | Advanced Filter | **Move To** | Toggle Group By | Export | Grid State

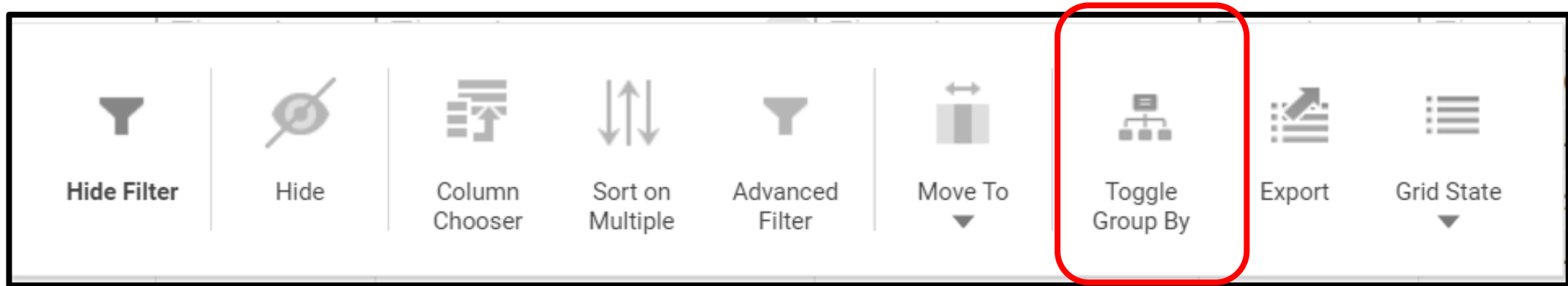
Purchase Order List

Show Search

List

myTasks	Validated	Approvals	Delivery	Department	P.O. Number	Type	Description
▼	▼	▼  Contains...		▼  Contains...	▼  Contains...	▼  Contains...	▼  Contains...





Allows you to group items on the page by a column.



Drag a column here or [select columns](#) to Group By

Department

myTasks	Validated	Approvals	Delivery	P.O. Number	Department	Type	Description	Attachments
		Contains...		Contains...	Starts with...	Contains...	Contains...	
- Department: ADM_ADM - Admin Name - Changed.Administrative Services - Change (2)								
	✓	Approved	✓	2024-00000005	ADM_ADM - Admin Name - Changed...	Standard	test	
		0 of 1 at 1		Edit	ADM_ADM - Admin Name - Changed...	Standard	test	
- Department: ADM_COM - Admin Name - Changed.Communications (1)								
		0 of 1 at 1		Edit	ADM_COM - Admin Name - Changed...	Standard	test PO	
- Department: ADM_LOS - Admin Name - Changed.Loss Control (1)								
	✓	1 of 1 at 3		Edit	ADM_LOS - Admin Name - Changed.L...	Standard	test approval vislble	
- Department: ENG_ENG - Eng - Bldg.Engineering (8)								

This Purchase Order List page has been sorted by originating department.



Can export all or the current page to Excel.

### Export Options ✕

**Export Type**

All Pages  Current Page

**Export Format**

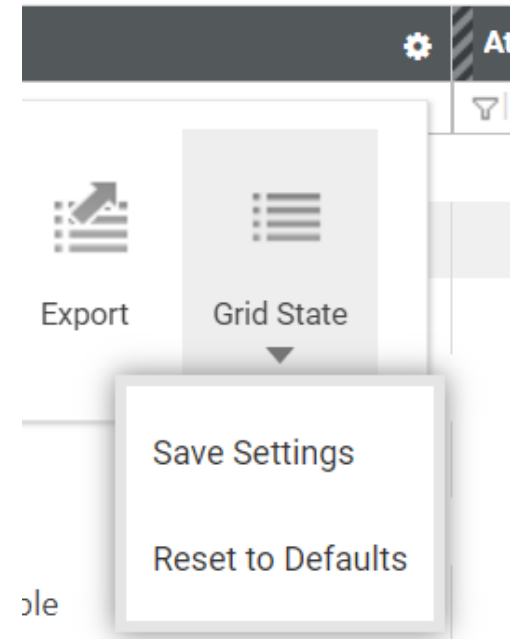
Excel Workbook (\*.xlsx)  Excel 97-2003 Workbook (\*.xls)

**Export** **Cancel**



Once a page has been configured, it can be saved with **Save Settings**.

Conversely, the changes can be removed with **Reset to Defaults**.





And Lastly

# Housekeeping tips for Inactivating Users

Why do we inactivate Users?

Why can't we just delete them?

What should we do after inactivating the user?

# How do I inactivate a User?

**NWERP 2021.1** Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

### User List

Login ID	User Name	Email Address	Active
▼   Contains...	▼   nws2	▼   Contains...	▼
nws2	nws2	nws@tylertech.com	✓

- new world ERP Suite
  - Financial Management
  - Human Resources
  - Utility Management
  - Community Development
  - About new world ERP
- Security
  - System
  - Process Manager
  - Approval Manager
  - Notifications
  - Chart of Accounts
  - Procurement
  - Banks
- Users
  - User-Based Security
  - Roles
  - Security Templates
  - User Defined Fields
  - User Defined Mass Update
  - Field-Level Security
  - Change Request Type



Navigate here and click on the Login ID.



User List

User - nws2

General ▾

Authorized Hours ▾

Settings ▾

Login

Update Tyler Identity User

Tyler Identity User

Name

Default Company

Email Address

Employee Number

Active



Licenses

Community Development

Financial Management

Human Resources

Utility Management

myCommunity Mobile

myInspections

Save

Save/New

Reset

Permissions

User Based

Copy to New User

Copy to Existing User

Uncheck  
the  
Active  
box



## Now that they are inactive, what else should I do?

- Whereas they will be removed from Process Manager and User-Based Security reporting, they will still show when updating Security Templates.
  - Remove the Security Templates from the user to save time when updating templates in the future.



# QUESTIONS



# FM Useful Practices and Handy Tips



## Your feedback is important

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Please complete the session survey via the mobile app

We read every submission

We use your input to guide content for future sessions and to improve our presentations

CONNECT 24

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