

WELCOME TO  
**CONNECT**

# CONNECT 24

I Didn't Know I Could Do That



# Christopher Beaubien

Manager, Technical  
Services

# Agenda



- Introduction
- Session Goals
- Helpful Software Tips
- Tips & Tricks
- Q&A
- Quiz (with Prizes...maybe)

# Introduction

- 15 years in IT
- 7 Years with Tyler/ New World
- Cloud Hosted Team
- Currently Building Two Tiny Homes
- Have a Dachshund Puppy Named “Leon”



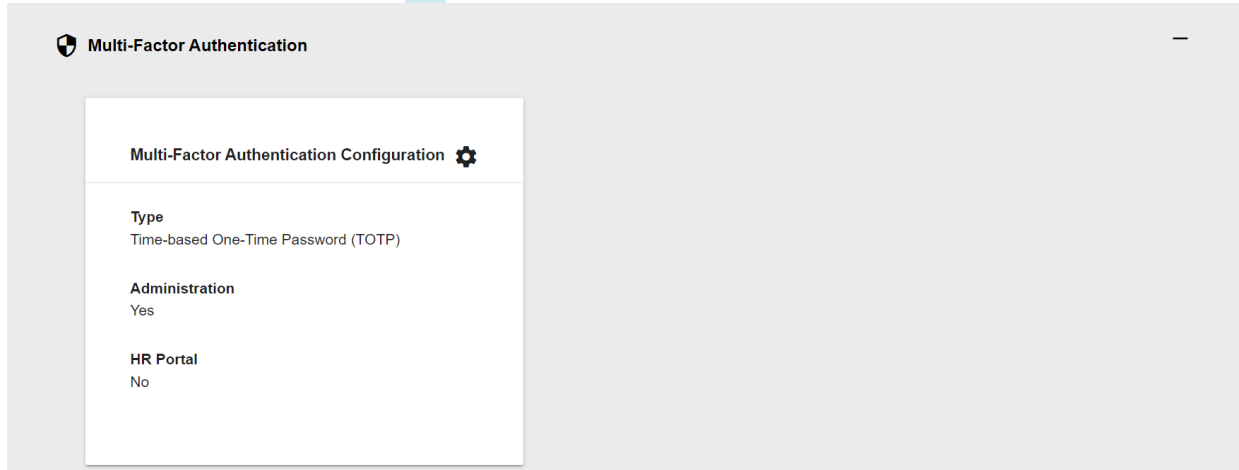
# Session Goals

- Highlight lesser used features
- Expand your toolbox
- Make life easier

# eSuite MFA

# Enabling MFA for a module

To enable MFA for a supported module, on the Management Console, go to the Configuration Settings page and scroll down to the Multi-Factor Authentication bar






# Enabling MFA for a module

## Multi-Factor Authentication Configuration Settings

Type

Time-based One-Time Password (TOTP) 

Administration

HR Portal

Cancel

Save

# What the End Users See First Log In



## Administration Log In

Follow the instructions below to perform Multifactor Authentication (MFA).

1. Install one of the following applications on your mobile:

- FreeOTP
- Google Authenticator
- OIra

If a mobile device is not available use the Windows application: [Microsoft OIra](#).

2. Open the application and scan the barcode:



Or enter the following secret in your app:

HMOR AIKW 2F7Y C4RA FEGL OIPA D3BI 7XNF

Note: Some applications will not support space(s) inside the code.

Enter the one-time code provided by the application and click Submit.

One-time code

**Restart Login?**  
Need to restart the login process?  
[Login to Your Account](#)

# What the End Users See



## Administration Log In

Follow the instructions below to perform Multifactor Authentication (MFA).

Enter the one-time code provided by the application and click Submit.

One-time code

Submit

### Restart Login?

Need to restart the login process?

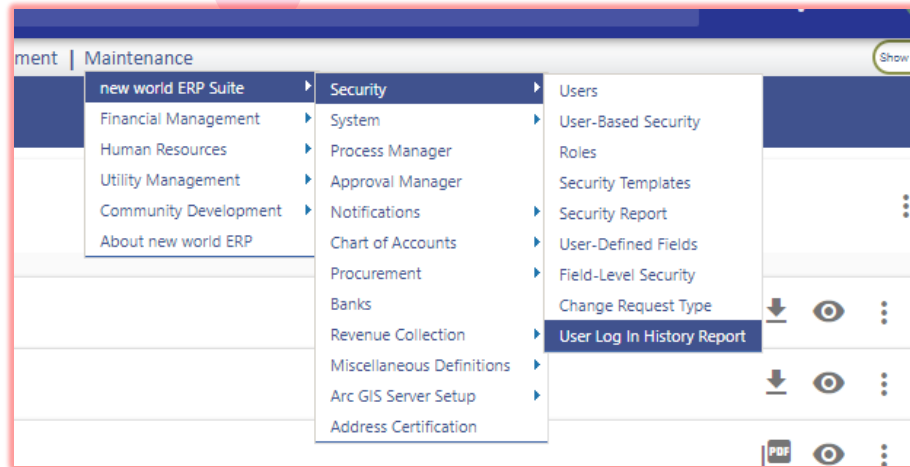
[Login to Your Account](#)

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[Tyler Technologies](#)

# System Admin Tools

# User Log In History Report

- Maintenance > New World ERP Suite > Security > [User Login History Report](#)
- View users that logged in and when
- Security Component = User Log In History Report




# User Log In History Report


## User Log In History Report

Load Saved Report

Override Report Title

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From Log In Date  

To Log In Date  

User

Last Log In Only

Active Only

Include Users That Have not Logged In

# User Log In History Report



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## User Log In History Report

Log In Date Range 02/05/20 - 03/05/20

Only the Last Log In per User

All Active Users Who Have Logged in During This Period

Log In ID	User Name	Log In Date/Time	Log Out Date/Time	Log In IP Address	Days Since Last Log In	Last Log In Date/Time	Log In Count
Aaron	Aaron	03/05/2020 07:34 AM		10.100.10.199	0	03/05/2020 07:34 AM	11
Aaron2	Aaron2	02/05/2020 11:52 AM	02/05/2020 11:52 AM	10.100.168.64	29	02/05/2020 11:52 AM	1
bbadalucco	bbadalucco	03/04/2020 08:57 AM	03/04/2020 09:19 AM	10.100.32.254	1	03/04/2020 08:57 AM	2
Ben	Ben	02/10/2020 12:42 PM	02/12/2020 10:18 AM	10.254.202.90	24	02/10/2020 12:42 PM	2
ewilson	ewilson	02/29/2020 06:22 PM	03/02/2020 06:00 AM	10.254.103.73	5	02/29/2020 06:22 PM	3
Justin	Justin	02/26/2020 10:04 AM	02/26/2020 10:05 AM	10.100.168.64	8	02/26/2020 10:04 AM	1
Mark	Mark	02/28/2020 09:09 AM	02/28/2020 05:34 PM	10.100.8.176	6	02/28/2020 09:09 AM	2
Mary	Mary	03/04/2020 04:46 PM	03/04/2020 07:10 PM	10.100.8.89	1	03/04/2020 04:46 PM	1
nws	NWS	03/03/2020 02:54 PM	03/03/2020 02:55 PM	10.100.9.114	2	03/03/2020 02:54 PM	12
Sandy	Sandy	02/07/2020 10:36 AM	02/07/2020 06:10 PM	10.100.8.191	27	02/07/2020 10:36 AM	1
Schulte	Schulte	02/05/2020 03:58 PM	02/05/2020 05:27 PM	10.254.101.94	29	02/05/2020 03:58 PM	1
WarmUpUser	[Internal] Warm Up	02/06/2020 06:04 AM	02/06/2020 06:24 AM	fe80::e5c6:dc1f:28fe:9f49%3	28	02/06/2020 06:04 AM	14

Run by Aaron on 03/05/2020 10:17:05 AM

Page 1 of 1

# User License Report

## User List

LoginID	User Name	Active	Out Of Office
12345678901234567890...	User with 20+ char	✓	
1a	1a	✓	
1b	1b	✓	
2a	2a	✓	
2b	2b	✓	
3a	3a	✓	
3b	3b	✓	
aguo	Albert Guo	✓	
aj	Aj	✓	
ALR	ALR	✓	
amaic/m	Aaron	✓	
asecmtest	asecm test	✓	

Items: 1 - 50 of 115 Page 1 of 3 Next Page

New Refresh Export Permissions Copy User User Based Out of Office Reassign Tasks User License Report

- Who is using my licenses?
- Maintenance > NWERP Suite > Security > Users > User License Report button
- Security Component = User License Report



# Who is using my licenses?

https://logosint.corp.tyler technologies.com/?ReportGUID=81f6e075-0b8a-405b-a855-7f648406

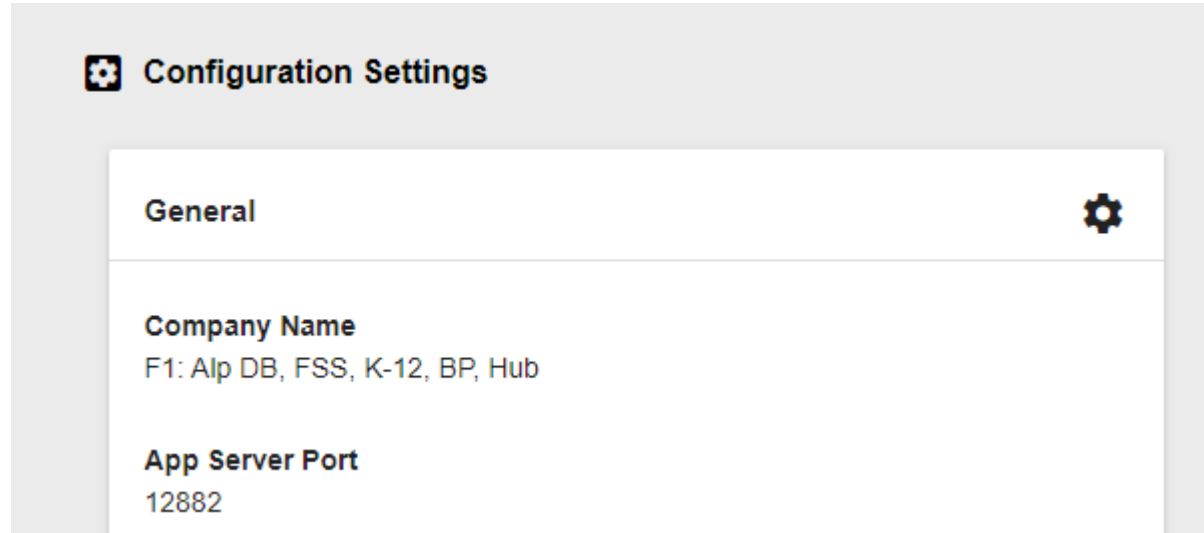
1 of 2 100% Find | Next

## User License Report

Log In ID	User Name	Community Development	Financial Management	Human Resources	Utility Management	Last Login
12345678901234567890123	User with 20+ char	✓	✓	✓	✓	07/14/2016 02:35 PM
1a	1a	✓	✓	✓	✓	
1b	1b	✓	✓	✓	✓	
2a	2a	✓	✓	✓	✓	06/13/2016 05:50 PM
2b	2b	✓	✓	✓	✓	
3a	3a	✓	✓	✓	✓	

# Maintenance Banner

# Maintenance Banner



- On the General Configuration Settings card. Click the Gear

# Maintenance Banner

- Fill out the *Maintenance Banner Message* setting at the bottom
- When data is present, the banner will show

Import/Export Schema Path  
ImportExport\Import\Schemas

Data Access Timeout In Seconds  
0

Automatic Restart  
03:00 AM

Maintenance Banner Message  
Tyler Connect Banner

Cancel Save

# Maintenance Banner

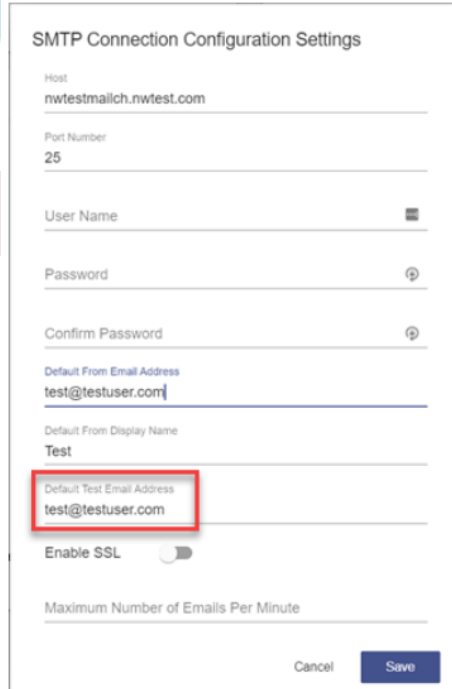
The screenshot displays a web application interface. At the top, a dark blue header contains the text "F1: Alp DB, FSS, K-12, BP, Hub" and a search bar. Below this is a navigation bar with links for "myFavorites", "Financial Management", "Human Resources", "Utility Management", "Community Development", and "Maintenance". An orange banner reads "Welcome to new world ERP - Michael Adnson". Below that is a yellow banner labeled "Tyler Connect Banner" with a "CLOSE" button on the right. The main content area features a calendar for "Jan - Mar 2022". The calendar shows days from Monday (31) to Sunday (6). The Friday (4) is highlighted with a purple border. On the left side, there are three widgets: "CALENDAR" with 0 events, "NOTIFICATIONS" with 0 notifications, and "APPROVALS" with 0 approvals. At the bottom of the calendar, there is a button labeled "ADD A NEW EVENT +".

- Displays on every home page load for every user.  
Close button in right side

# Email Testing

# Email Testing

To be able to test emailing more efficiently for New World ERP, a new field, Default Test Email Address, has been added to the SMTP Connection Configuration Settings card in the Management Console:



SMTP Connection Configuration Settings

Host  
nwtestmailch.nwtest.com

Port Number  
25

User Name

Password

Confirm Password

Default From Email Address  
test@testuser.com

Default From Display Name  
Test

Default Test Email Address  
test@testuser.com

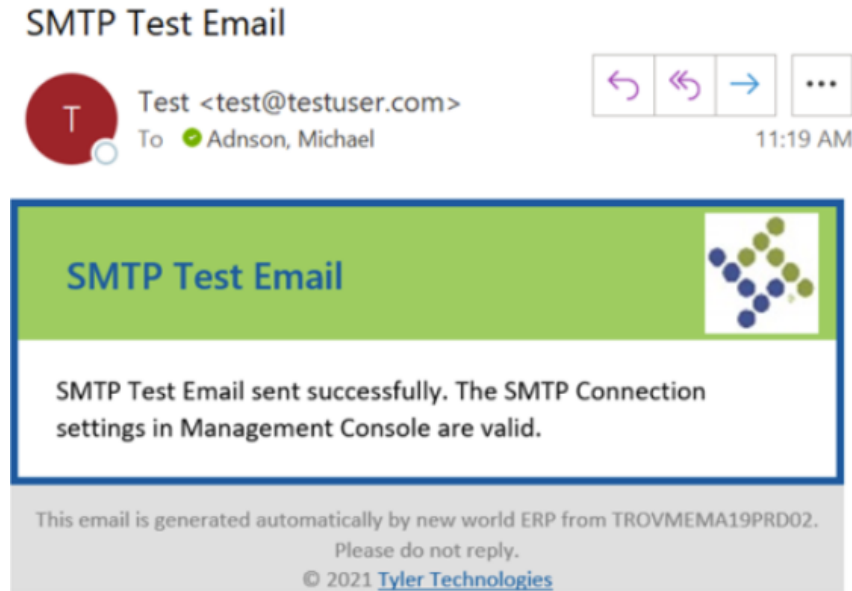
Enable SSL

Maximum Number of Emails Per Minute

Cancel Save

# Email Testing

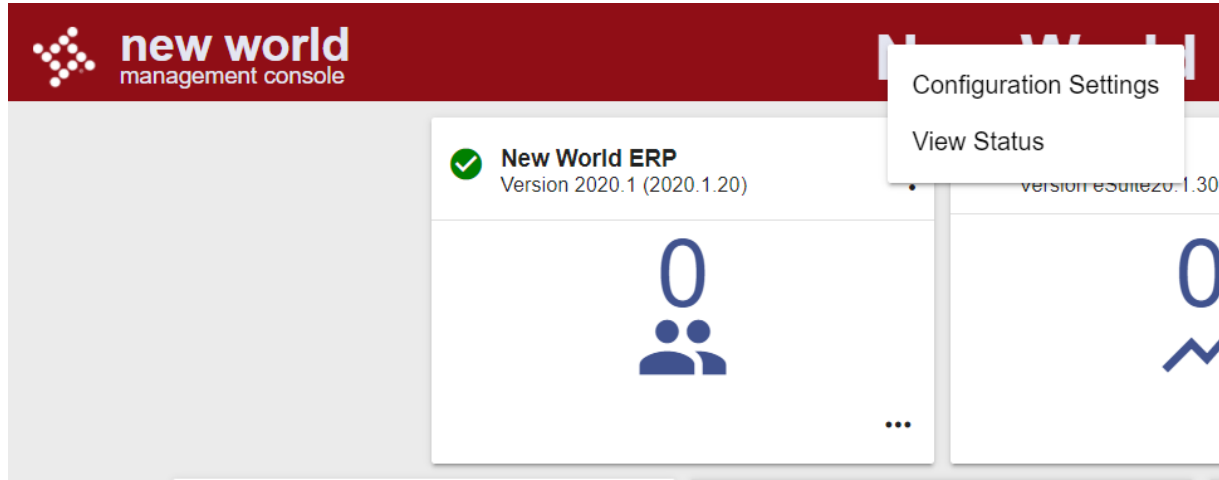
When email settings are working properly, an email such as the following is sent to the Default Test Email Address:





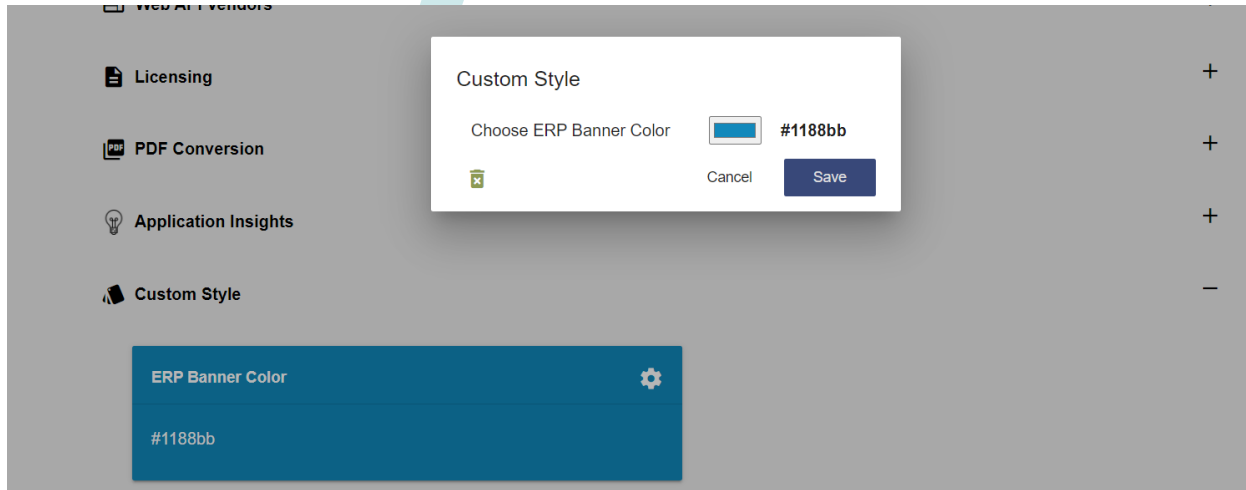
# Banner Color

# Change Banner Color



- Management Console Guide
- Click NWERP Card Ellipses > Configuration Settings

# Change Banner Color



- Scroll to bottom
- Click Custom Style > Gear

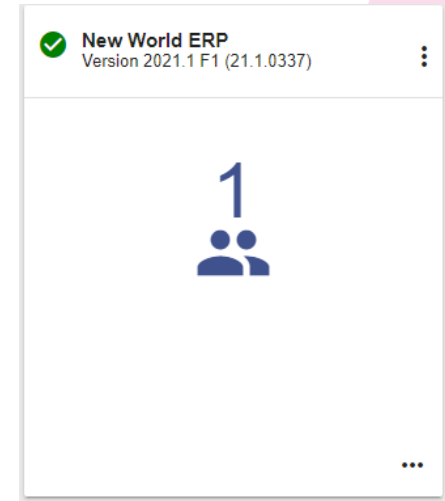
# Change Banner Color

The screenshot shows the top navigation bar of the New World ERP 2020.1 system. The bar is dark blue and contains the following elements from left to right: a logo, the text 'New World ERP 2020.1', a search input field with the placeholder text 'Search', a notification bell icon, a grid icon, and a user profile icon with the letter 'N'. Below the navigation bar is a horizontal menu with links for 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. A red rectangular box highlights a blue banner area below the menu, which contains the text 'Welcome to new world ERP - NWS'. Below the banner, a purple button with a calendar icon is visible.

# Messaging Users

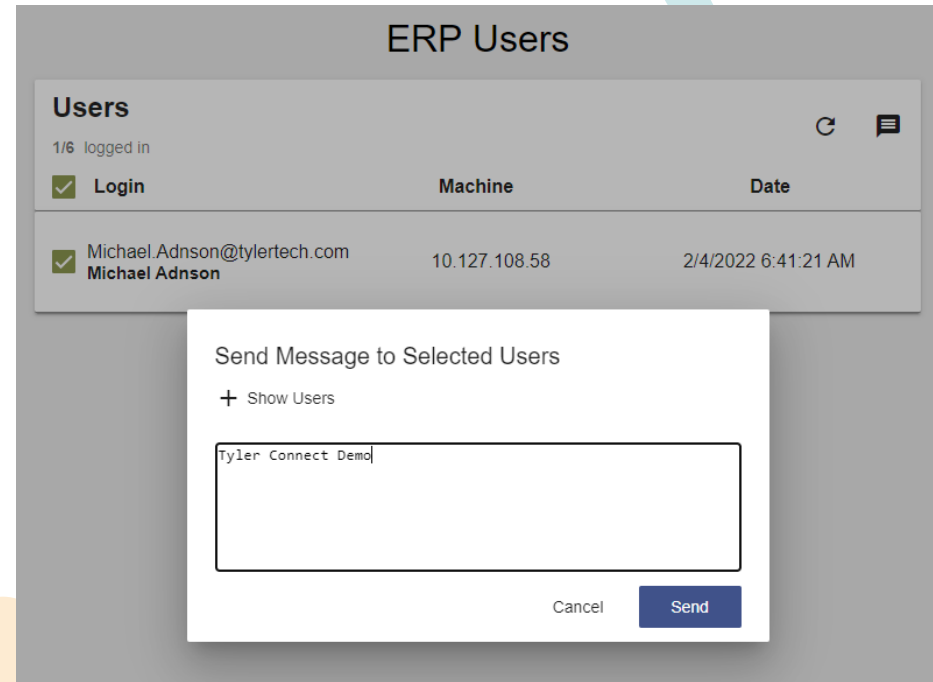
# Management Console Messaging

- Share information with all logged in users or a pointed set at same time
- Click on the User Count in the Console



# Management Console Messaging

- Choose the users to message and send your message.



The screenshot displays the 'ERP Users' management interface. At the top, there is a 'Users' section with a refresh icon and a message icon. Below this, it indicates '1/6 logged in'. A table lists user information with columns for 'Login', 'Machine', and 'Date'. The first user listed is Michael Adnson, with email Michael.Adnson@tylertech.com, IP address 10.127.108.58, and a login time of 2/4/2022 6:41:21 AM. A modal dialog titled 'Send Message to Selected Users' is open, featuring a '+ Show Users' link and a text input field containing 'Tyler Connect Demo'. The dialog has 'Cancel' and 'Send' buttons at the bottom right.

Login	Machine	Date
Michael.Adnson@tylertech.com Michael Adnson	10.127.108.58	2/4/2022 6:41:21 AM

Send Message to Selected Users

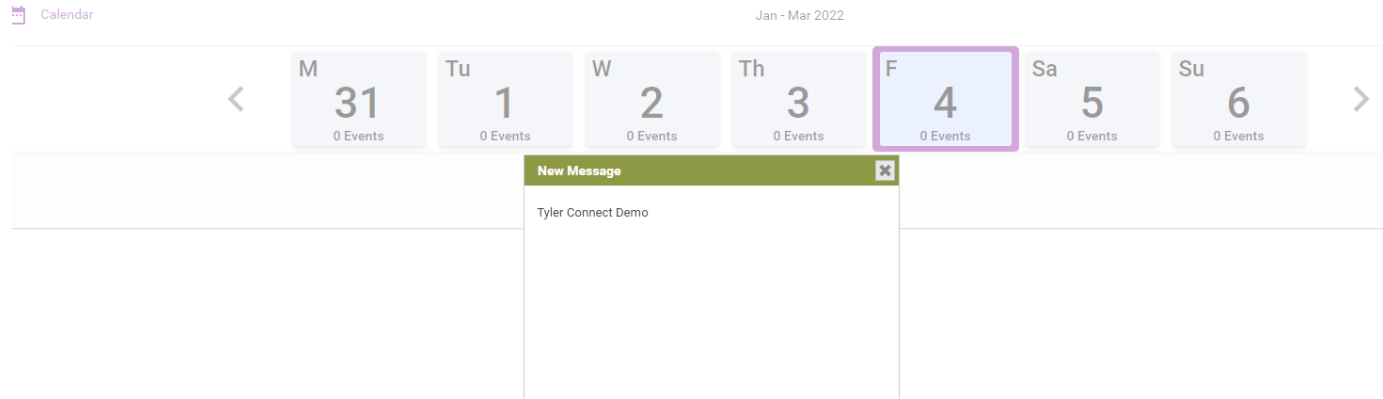
+ Show Users

Tyler Connect Demo

Cancel Send

# Management Console Messaging

- Users get a popup in their browser with the information that was shared.





# Management Console Messaging




- Email All Active Users.

## ERP Users

### Users

0/2 logged in

Login Machine Data

[Email all active users](#)

No active users

# Management Console Messaging

- Automatically opens an email to send to all active users



A screenshot of an email composition interface. On the left, there is a grey button with a white paper plane icon and the text "Send". To the right of this button are three stacked input fields: "To" with the value "nws@testemail.com", "Cc", and "Bcc". Below these fields is a "Subject" label followed by a vertical line and a large empty text area for the subject line.

**Christopher Beaubien**  
Supervisory Team Lead, Technician Services  
Tyler Technologies, Inc.

# eSuite Website “Switches”

# eSuite Website Switches

eSuite Website Install Options (Utilized in Orchestrator Patch 2021.1.21 or higher)

eHR Websites

Selecting this option will install eHR Websites.

ePermits Website

Selecting this option will install ePermits Website.

eRequestForAction Website

Selecting this option will install eRequestForAction Website.

eSupplier/eBids Websites

Selecting this option will install eSupplier and eBids Websites.

eMiscellaneousBilling Website

Selecting this option will install eMiscellaneousBilling Website.

eUtilities Website

Selecting this option will install eUtilities Website.

eLicensing Website

Selecting this option will install eLicensing Website.

# “Secret” Management Console Features

# Download System Logs

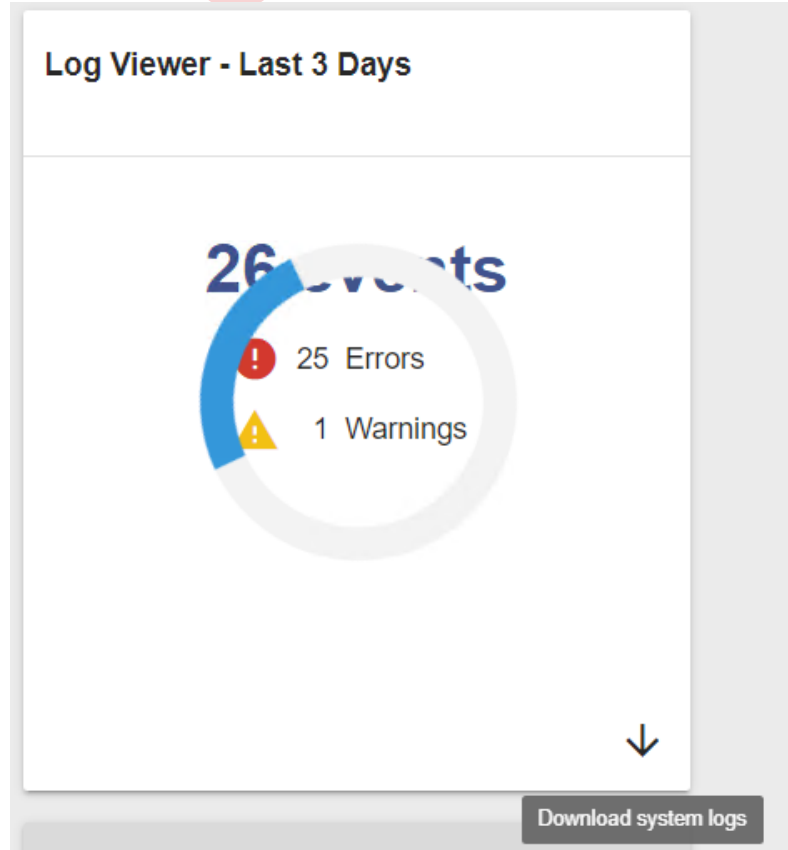
Log Viewer - Last 3 Days

26 Events

- 25 Errors
- 1 Warnings

↓

Download system logs

A screenshot of a web-based log viewer interface. At the top, it says "Log Viewer - Last 3 Days". Below that, a large blue number "26" is followed by the word "Events". Underneath, there are two items: "25 Errors" with a red exclamation mark icon, and "1 Warnings" with a yellow warning triangle icon. At the bottom right of the main content area, there is a downward-pointing arrow icon. Below the entire screenshot, there is a dark grey button with the text "Download system logs" in white.

# Management Console – Service Management

The screenshot displays the 'new world management console' interface. At the top, there is a dark red header with the text 'new world management console' on the left and 'New Wo' on the right. Below the header, a service card is visible. The card has a green checkmark icon and the text 'New World ERP' followed by 'Version 2019.1 (19.1.0062)'. Below this text, there is a large blue number '1' and a blue icon representing two people. A dropdown menu is open over the card, showing two options: 'Configuration Settings' and 'View Status'. The 'View Status' option is highlighted with a green border. To the right of the card, there is a blue icon representing a person and a blue line graph icon. At the bottom right of the card, there are three dots indicating a menu.

# Management Console – Service Management

← Status

*App Server Service and Caching Service must be running for ERP to function properly*


⋮ Website	Running	⋮ App Server	Running	⋮ Caching	Running
⋮ Advanced Metering Infrastructure	Running	⋮ Auditing	Running	⋮ Discovery Proxy	Running
⋮ ePay Revenue Collection	Running	⋮ File Storage	Running	⋮ HR External Updater	Running
⋮ Notification	Running	⋮ PDF Conversion	Running	⋮ Restart	Running
⋮ Scheduling	Running	⋮ Search Index	Running	⋮ Search Index Monitor	Running
⋮ TCM Updater	Running	⋮ Tyler Forms Engine	Running	⋮ Updater	Running

Stop All  
Restart All  
Running



# SSRS Logos

# Add an SSRS Logo



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## System Settings Listing

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<u>General</u>		<u>Communication</u>	
Phone Number Mask	<b>(##) ###-####</b>	Connection Timeout in Seconds	3
Social Security Number Mask	<b>000-00-0000</b>	Connection Retries	3
Date Format	<b>mm/dd/yyyy</b>	Message Timeout in Seconds	60
		Message Delay in Seconds	0
<u>Security</u>		<u>System</u>	
Require Number in Password	<b>No</b>	Max. Rows Returned by Search	<b>1000</b>
Password Expiration in Days		Error Lifetime in Days	<b>30</b>
Password Expiration Threshold		Purge Frequency in Days	<b>1</b>
Password Minimum Length			
Password Maximum Length		<u>Email</u>	
Password History		Total Attachment Size Limit	<b>99 MB</b>
Encryption Level	<b>None</b>	Maximum Attachments	<b>5</b>
Authentication Method	<b>Standard</b>		
Domain		<u>PDF Thresholds</u>	
		Warning Size	<b>5 MB</b>
		Maximum Size	<b>15 MB</b>

- Make your reports more professional
- Adding an SSRS Logo

# Home Page Customization

## Home Page Defaults

The home page has been updated to let you select any of the five home page views

CALENDAR  
NOTIFICATIONS  
APPROVALS  
REPORTS  
NOTES

# Home Page Defaults

Select the home page view you want, click the More actions menu, and click the Open “Make Default Card option”.

Apr 2023

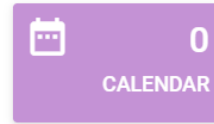
Tu 25 0 Events	W 26 0 Events	Th 27 0 Events	F 28 0 Events	Sa 29 0 Events	S 30 0 Events
----------------------	---------------------	----------------------	---------------------	----------------------	---------------------

ADD A NEW EVENT +

- + Add a new Event
- ★ Make Default Card

# Home Page Defaults

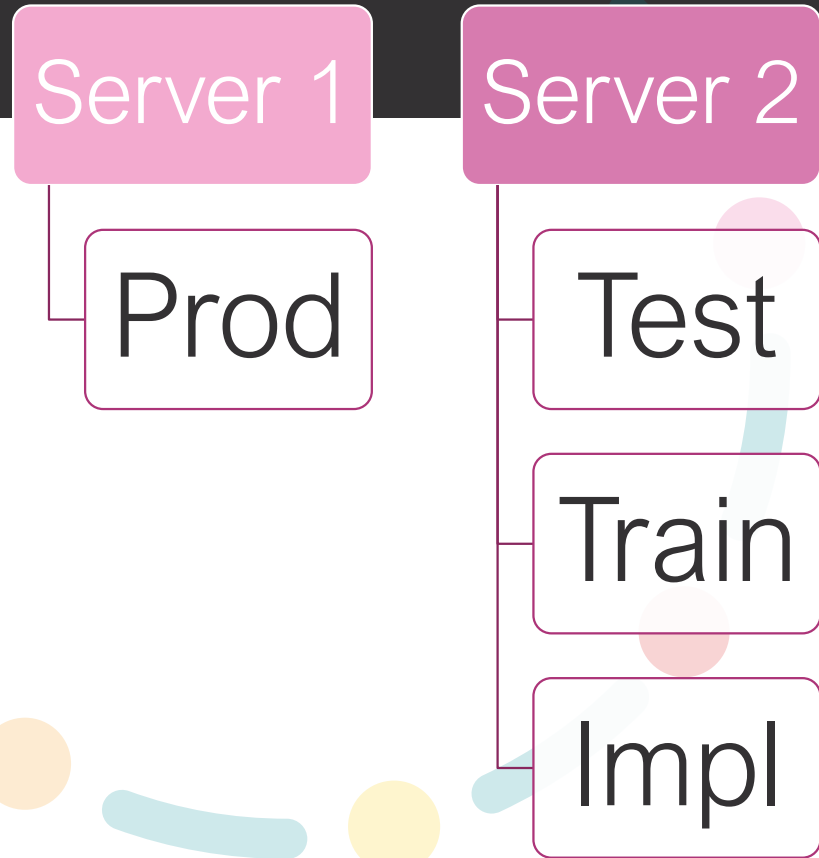
The current default view is noted by a star in the bottom-left corner of the corresponding card.



# Application Server Stacking

# App Server Stacking

- Available since 2019.1
- Would need an RFS from TSM
- Server migrations are the best time



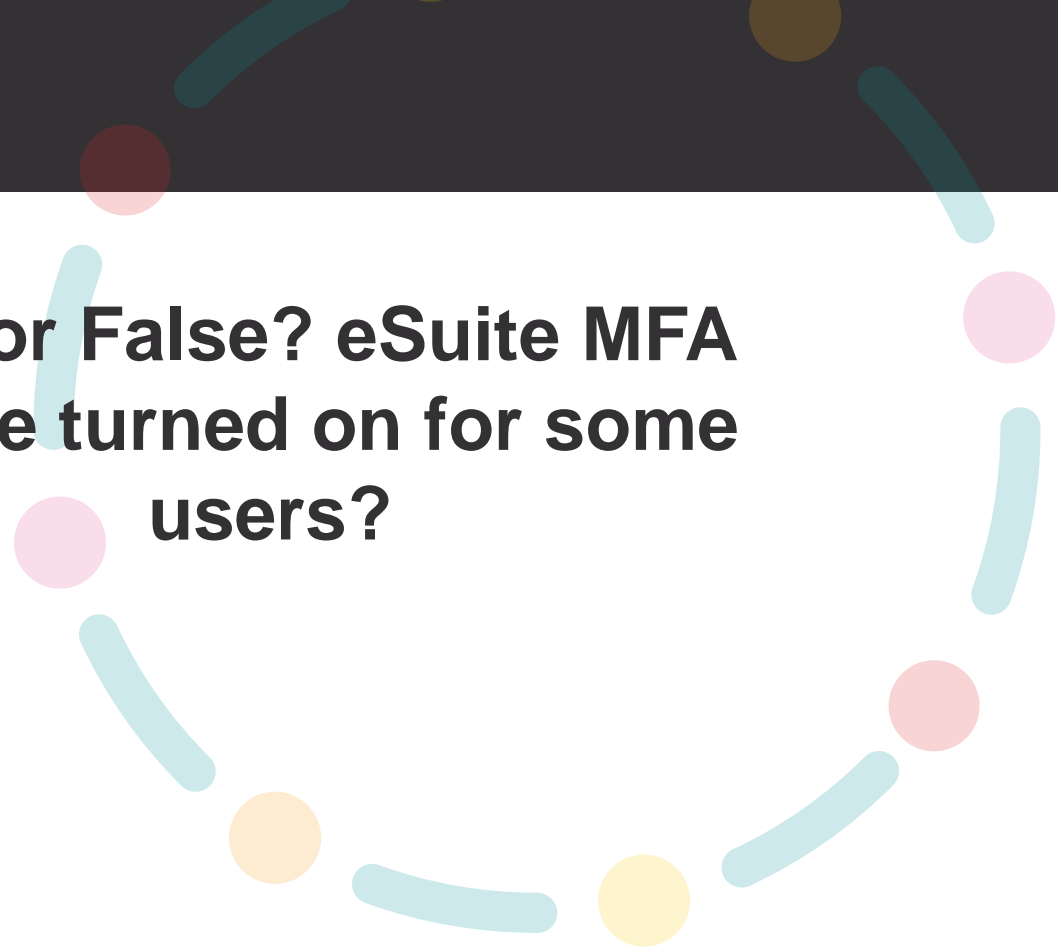




# Quiz Time!



# Where can you download the system Logs?

A decorative graphic consisting of several colored circles (pink, orange, yellow, red) and light blue arcs arranged in a circular pattern around the central text.

**True or False? eSuite MFA  
can be turned on for some  
users?**

**True or False? The color of  
the Software Banner can  
not be changed**

**True or False? The logo that appears on reports can not be changed.**

# What is my puppy's name?

