

Tyler Identity User Account Management

New World ERP – Foundation



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Note: The User Account Management pages are best viewed in the Chrome web browser.

PREPARING FOR A MIGRATION OF YOUR USERS TO TYLER IDENTITY

The first step in getting ready to migrate to Tyler Identity is to analyze your SecurityUser data in the New World ERP database. Identity has two major rules: Active users need to have a unique email address, and every user you want to migrate to Tyler Identity needs to have an email address on their record in the SecurityUser table. If you are using Active Directory Integration, this email address should match the email address configured for the user in Active Directory.

1. Tyler Identity requires each user to have a unique email address on their record. If integrating to AD, this email address should be the address on the account in Active Directory. To check for duplicate email addresses, run the following SQL Script against your ERP database:

Select EmailAddress, Count(*) from SecurityUser Group by EmailAddress Having Count(*) > 1

2. To check for users with no email addresses or null email addresses, run the following query. These users will not migrate to Tyler Identity:

Select LoginID, UserName, EmailAddress from SecurityUser WHERE (EmailAddress is null or EmailAddress = '') AND InactiveFlag = 0

PASSWORD SECURITY OPTIONS (FOR NON-AD SETUPS)

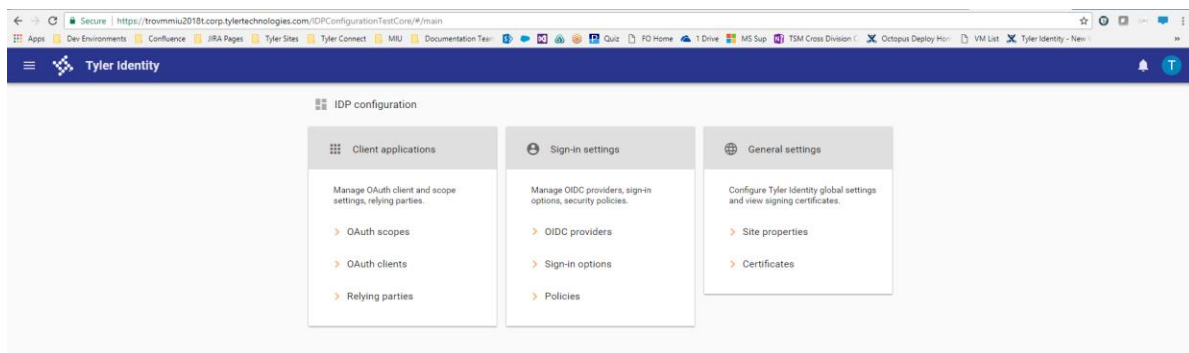
To manage password complexity requirements in Tyler Identity, a site will be running on the Tyler Identity server. This site's URL would look something like the following (this example is for a test environment; replace test with whatever your environment was named in the Identity install):

<https://SSLCertName/IDPConfigurationTestCore/>

There is a default user and password for this site. We recommend you change this password after installing Identity (more detail on that later in this document):

User: *tyleridentityadmin@tylertech.com*

Password: *Password@2*



Click on the **Policies** link.

The **GENERAL** tab contains settings for password complexity options, including requiring uppercase letters, special characters and numeric characters in passwords.

In New World ERP, we are not currently using the **TWO-FACTOR** authentication option, and all account verification will be done through email address verification.

The **ACCOUNT LOCKOUT** tab can be configured to change the lockout time for a user and the number of failed logins before a lockout occurs:

← Policies

GENERAL TWO-FACTOR ACCOUNT LOCKOUT

Minimum password length
2

Maximum password length
20

Password reset frequency (days)
0

Password policy regular expression (advanced)

Special characters not allowed

☐ Require uppercase letter

☐ Require lowercase letter

☐ Require numeral

☐ Require special character

CANCEL SAVE

CHANGING A USER'S PASSWORD

Note: If Tyler Identity is configured to authenticate against Active Directory this section does not apply.

There are multiple ways to change a user's password in Tyler Identity. The first is through the New World ERP software itself. Users can use the *Forgot your Password?* link on the login page or, once logged in, utilize the *Reset TID Password* link on the My Settings page:

Users would be taken to this page, where they could change their password:

Alternatively, users can access the same site through the Tyler Identity pages. To do this, go to the <https://SSLCertName/IDPUserProvisioningINSTANCENAMECore>, where SSL Cert Name is the SSL certificate used on the Tyler Identity server and the INSTANCENAME variable is set to the environment name you used in the Tyler ID Install. Log in using the user's user name and password:

Click the  icon on the Password card. Enter your previous password and the desired password and click **CHANGE PASSWORD**:

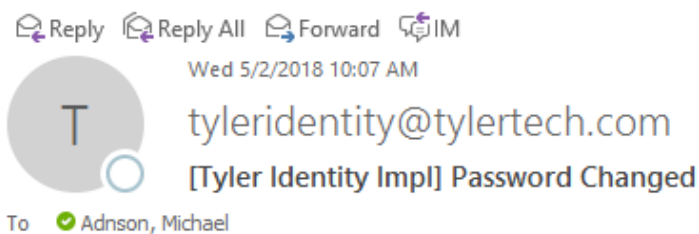

User Self-Service
T

Account Profile: tyleridentityadmin@tylertech.com

Current Password *
Password *
Confirm Password *

CHANGE PASSWORD
CANCEL

After the password is changed, a user will receive a confirmation email of the change:



Your password has been changed at Tyler Identity Impl.

Username: nws

Click here to login:

<https://trovmmiu2018t.corp.tylertechnologies.com/IDPUserProvisioningImplCore/#/profile>

Thanks!

Tyler Identity Administrator

ADDING A NEW AD ACCOUNT AND LINKING TO ERP

1. The *Authentication Method* on the System Settings Maintenance page drives the type of users that will get created in Tyler Identity, either AD or TID. If the setting is set to **Windows Authentication**, as shown below, the **Find** button will show on the Security Users page as it did in the past:

System Setting Maintenance

General

Phone Number Mask (###) ###-####

Social Security Number Mask 000-00-0000

Date Format mm/dd/yyyy ▼

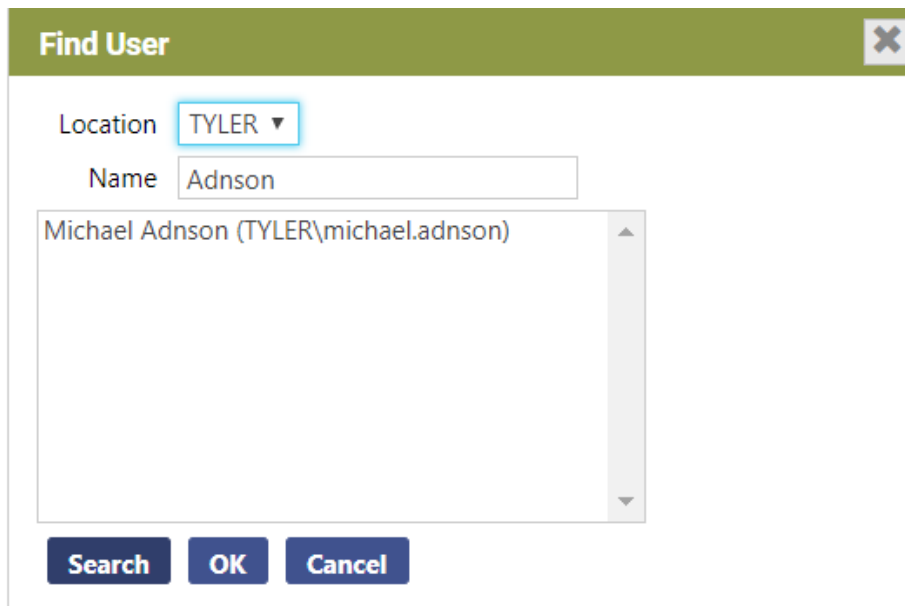
General

Authentication Method Windows Authentication ▼

2. In Maintenance > New World ERP > Security > Users, when you add a new user with Windows Authentication set in the location described in Step 1, you will see the **Find** button:

The screenshot shows the 'City Of NWS' user management interface. At the top is a navigation bar with the City of NWS logo and a search bar. Below this is a breadcrumb trail: myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance. The main section is titled 'User List' and 'User'. There are two tabs: 'General' (selected) and 'Authorized Hours'. The 'General' tab contains several input fields: 'Login' (with a 'Find' button next to it), 'Create Tyler Identity User' (checked), 'Name', 'Default Company' (dropdown), 'Email Address', 'Employee Number' (dropdown), and 'Active' (checked). Below these fields are sections for 'Licenses' (Community Development, Financial Management, Human Resources, Utility Management) and 'myCommunity Mobile' (myInspections). At the bottom of the form are five buttons: 'Save', 'Save/New', 'Reset', 'Permissions', and 'User Based'.

3. Clicking the **Find** button allows you to search for and select that user in AD. After highlighting the user and clicking **OK**, the User page redisplay, and the user's *Email Address* is pulled in from AD:

A screenshot of a 'Find User' dialog box. The title bar is olive green with a close button (X) on the right. The dialog contains a 'Location' dropdown menu set to 'TYLER', a 'Name' text input field containing 'Adnson', and a list box below showing 'Michael Adnson (TYLER\michael.adnson)'. At the bottom are three buttons: 'Search', 'OK', and 'Cancel'.

4. To finish creating the user, fill out the remaining required fields and ensure *Create Tyler Identity User* is checked. When you **Save**, a process will create the Tyler Identity user and allow the user to log directly into ERP with their current AD user name and password. Passwords for AD accounts are not stored in the Tyler Identity database and are continually checked against Active Directory:

City Of NWS Search

myFavorites | Financial Management | Human Resources | Utility Management | Commu

User List
User

General ▾ Authorized Hours ▾

Login TYLER\michael.adnson **Find**

Create Tyler Identity User ☒

Name Michael Adnson

Default Company City of NWS

Email Address M.A@tylertech.com

Employee Number

Active ☒

Licenses

Community Development ☒

Financial Management ☒

Human Resources ☒

Utility Management ☒

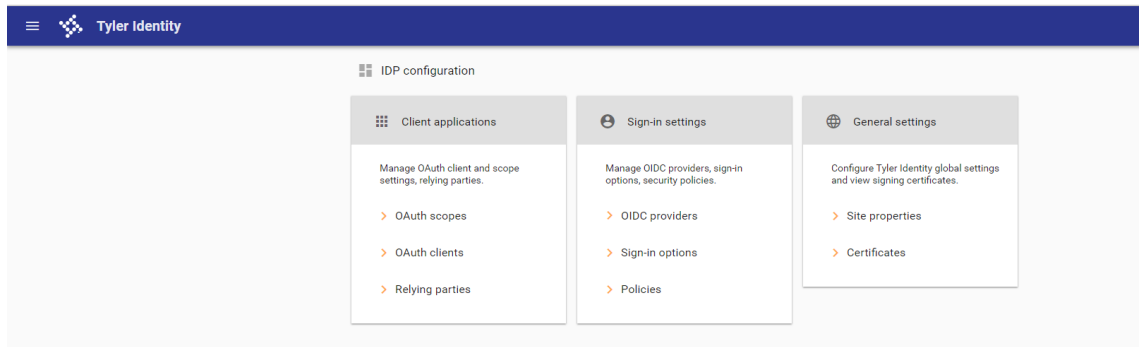
myCommunity Mobile

myInspections ☐

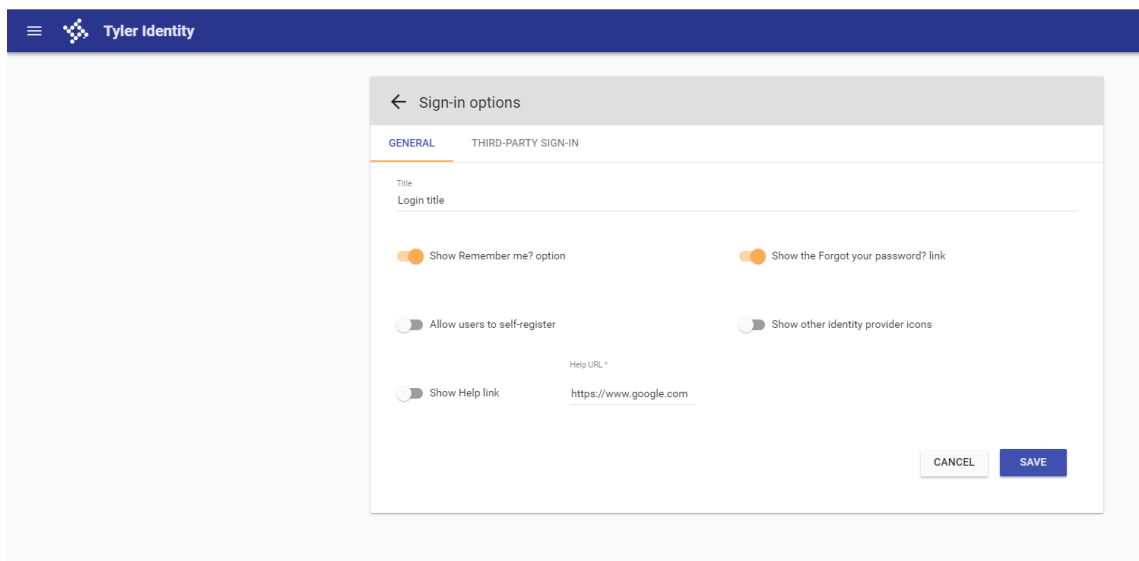
Save Save/New Reset Permissions User Based

ENABLING THE “FORGOT PASSWORD” LINK ON THE IDENTITY LOGIN HOMEPAGE (FOR NON-ACTIVE DIRECTORY SETUPS)

To enable the *Forgot My Password* link on the Tyler Identity login page, go to <https://trovmmiu2018t.corp.tylertechnologies.com/IDPConfigurationINSTANCENAMECore/>, where *INSTANCENAME* is replaced by your Tyler Identity instance name. Log into the site with an administration user. The default user and password are the *tyleridentityadmin@tylertech.com* user and password as described earlier in this document.



After you are logged in, click **Sign-in options** on the middle card. To enable the *Forgot your Password* link, enable the *Show the Forgot your password? Link* option:



On the next login to New World ERP, you will see the *Forgot your Password?* Link to initiate the password reset process.

Note: An `iisreset` is required on the Tyler Identity server before the *Forgot your Password?* Link will appear.



Sign in with your Tyler Account

Username *

Password

[Forgot your password?](#)

☐ Remember My Sign-in

SIGN IN

ENABLING ANOTHER ADMIN USER FOR TYLER IDENTITY ADMINISTRATION

Note: If Tyler Identity is configured to authenticate against Active Directory this section does not apply.

It is a good practice to enable another user or set of users (other than tyleridentityadmin@tylertech.com) to be able to manage Tyler Identity accounts and configuration.

To do this, go to <https://SSLCertName/IDPUserAdministrationENVNAMECore>, where *SSLCertName* would be replaced by the name of your SSL Certificate on the Tyler Identity server, and the *ENVNAME* variable would be replaced by the instance name chosen when installing Tyler Identity.

On the first login to this site, the tyleridentityadmin@tylertech.com user would need to be used. Search for a user you would like to be an admin:

User Administration

T

NW

CLEAR

Search Results (1) (Page 1)

NW ERPAdmin

Username	Email	2FA enabled
nws	Michael.Adnson@TylerTech.com	No
Mobile	Value	Extension
Account Verified	Login Allowed	
No	Yes	

EDIT USER

RESEND INVITATION

When you have found the user you would like to enable as an admin, click **EDIT USER**, and go to the **CLAIMS** tab. Add a claim for *ConfigurationAdmin* with a value of **true** and a claim for role with a value of **IdentityManagerAdministrator**, as shown below:

User Administration

T

Editing user: nws

MAIN

CLAIMS

Type	Value	
ConfigurationAdmin	true	 
Type	Value	
role	IdentityManagerAdministrator	 

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