Tyler Search Best Practices

New World ERP - Foundation: Tyler Search

OVERVIEW

Tyler Search provides an intelligent search, delivering the most relevant results possible from a vast amount of data.
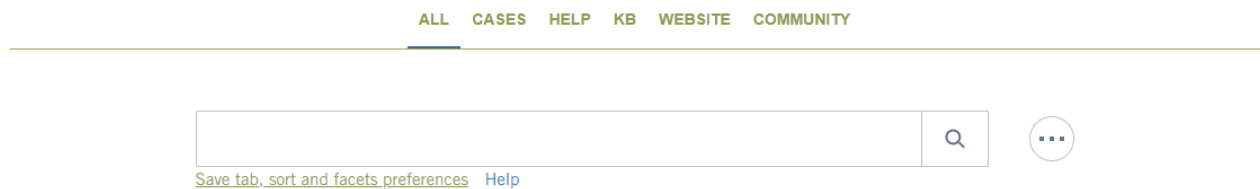

Figure 1 - Tyler Search

Your typical entry point will be the search box, where you can query data relevant to your issue.

Figure 2 - Tyler Search Box

Using the search box is similar to using any internet search engine. Simply enter your query and press **Enter** or click the magnifying glass icon. As with most search engines Tyler Search supports various types of search syntax. These search options will allow you to control how results are returned.

Tyler Search uses Machine Learning to help decipher queries and return relevant results, which can override the search syntax provided.

After you perform a search, many results will likely be returned.

There are two options for filtering results: you can use the tabs at the top of the page or the facets on the left side of the page.

Figure 3 - Tab Filters

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Figure 3 - Facet Selection

The tabs across the top, will direct you to specific types of knowledge. For example, if you were specifically looking for a Support Case, you can use the Cases tab to limit results to only Cases.

A facet is a search page control that consists of a list of values for a given field. It allows you to refine search results by filtering out those that do not have the selected value for the facet field.

To the right of each facet option, the number of occurrences of the facet field value in the search results is displayed.

After the initial search, facets are available on the left side of the screen to filter results. The more facets that are applied to a result the more focused it will become. Facets can be removed from the search criteria by clicking the X next to the facet.

Each facet is designed to show five types of selection criteria but using the + Search option at the bottom of each facet will display facets beyond the first five.

The save preferences option will allow you to maintain the selected facets across future Tyler Search sessions. Simply click the **Save tab, sort, and facets preferences** button below the search bar (as shown in Figure 5).

Save tab, sort and facets preferences   Help

Figure 4 - Save Preferences

Once you have located the knowledge item you were seeking, click the hyperlink for the item and it will begin to load.

TYLER SEARCH BEST PRACTICES

- Best Practice for searching is to select Tyler Products your office uses in the facet list and Save Preferences. If you make a mistake the Clear Preferences button will reset your selections.
- When searching using Tyler Search the more detail provided the better. This gives Tyler Search more context to use to find the correct knowledge items.
- Since Tyler Search is used across divisions within Tyler, it is recommended to refrain from using acronyms as these can mean different things to different products.
- Tyler Search uses click ranking to determine the relevancy of knowledge returned, if you find a relevant item make sure you click the link to the knowledge item. This will tell Tyler Search that the item returned is relevant based on your given search criteria.

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