

Server Migration

new world ERP



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Server Migration

New World ERP – Overview

OVERVIEW

This document will cover the following:

- Scheduling
- Client tasks
- Tyler System Management (TSM) tasks
- Testing
- Migration plan
- Support during and after the project
- Questions

Each part of the process is designed to ensure we have a successful migration with limited impact to the end users, your staff and our support teams.

SCHEDULING

There will be at least 4 scheduled items that will require joint sessions with the client and Tyler.

1. Kick off call (15 minutes)
2. Pre-build check point (30 minutes)
3. Server build (~2 days for a standard two-environment migration)
4. Cutover (~4 hours)

Building of the environment usually takes around 2 days to complete. We will include a **pre-build check point** to ensure the servers are ready for the TSM team to begin the build and install the Bomgar™ tools used during the build process. Bomgar is our remote support tools used by the TSM team to manage servers for our Managed Service customers and extended customer engagements. This tool will allow us to complete our work with minimal interaction with your team should you choose to allow it. This will be discussed further during the kick off call.

CLIENT TASKS

I wanted to highlight some key points that your team will need to complete prior to our scheduled server build:

- Create the Virtual Machines based on the recommended server specifications
<https://check.tylertech.com>
 - You can log on using any email address, and "Tyler" as the password. Select "New World ERP" and answer a few questions related to your current system.
- **Important: All the following items MUST be completed prior to the scheduled build date or will require rescheduling of the server build.**

Servers should be ready for Tyler to being the build:

- ☐ Verify that you have created the VMs (or physical servers) sufficient resources based on the recommended specifications, and referring to your existing servers as necessary
 - ☐ Virtual CPU count
 - ☐ RAM
 - ☐ Drive space (system as well as data and/or application)
- ☐ Operating System (Windows Server 2016 strongly preferred)
 - ☐ Activate Windows
 - ☐ Assign a static IP Address
 - ☐ Update Windows with all patches
 - ☐ Join all servers to your domain
- ☐ Add the AD (Windows) service account to the local Administrators group for each server
- ☐ Have desired SQL Server credential (sa or equivalent) information ready
- ☐ SQL Server installation media available
- ☐ SQL Server Management Studio 2016 is a separate download.
 - You will need version 16.5.x (version 17 is not supported on SQL Servers where Decision Support (DSS)/Business Analytics is installed)
- ☐ New World ERP installation files for the version that we will be installing
- ☐ Install any SSL certificates installed on all web servers (if implementing SSL only configuration *)
- ☐ Have email address available for alerts

* SSL certificates will be required on all New World ERP web servers in the 2018.1 release. It is suggested that "SSL only" configuration be implemented during the migration.

TYLER SYSTEM MANAGEMENT TASKS

Pre-build check point:

- ☐ Verify server requirements
- ☐ Verify availability of media
- ☐ Verify software and license.dat were downloaded
- ☐ Install Bomgar client
- ☐ High level overview/review of process with customer
- ☐ Start FileStorage/Documents copy (to new Live and Test servers)

Server build tasks:

- ☐ Install Microsoft SQL Server
 - ☐ Apply service pack and cumulative updates for SQL
 - ☐ Configure SQL using industry standard best practices
 - ☐ Configure Database Mail
 - ☐ Setup Microsoft standard maintenance plans
 - ☐ Migrate copies of all New World ERP databases to new SQL servers
- ☐ Install all New World ERP products and related 3rd party software
- ☐ Install the Managed Internet Updater (MIU)
- ☐ Apply all available MIU fixes
- ☐ Test to make sure HTML and SSRS reports generate and convert to PDF
- ☐ Copy FileStorage\Documents to the new Production Application server
- ☐ Setup custom interfaces purchased and supported by Tyler
- ☐ Perform basic testing to make sure all report types can be produced in the system

TESTING

Testing the new environment is the most important task of the project. New World ERP is a highly customizable program which makes producing a list of all things that can or should be tested nearly impossible. Our recommendation is to have your power users in all modules (FM, HR, UM, CD) test their daily, weekly, monthly, quarterly and yearly processes.

Here are a few items you should be included in any testing plan that you develop:

1. **Printing:**
 - a. AP checks
 - b. Payroll check
 - c. Utility bills
 - d. Receipts
2. **Custom SSRS reports**
 - a. Make sure the URL is pointed to the new servers
3. **Custom interfaces with 3rd party vendors**
4. **Any processes that you would consider critical to your daily functions**

It is crucial that we try to find and fix any problems during the testing phase to ensure a smooth transition to your new servers. Items that are not found and resolved during testing tend to become critical after your cutover and is very impactful to both your staff and our support center.

CUTOVER TASKS

We know that every customer is different in their server setup, configuration and hours of operation and we can tailor the plan to best suit your needs. However, most migrations we perform follow this standard plan at the scheduled time:

- Tyler Tasks:
 - ☐ Stop all New World ERP services and disable main service
 - ☐ Stop IIS
 - ☐ Backup all databases
 - ☐ Restore all databases to new SQL server
 - ☐ Upgrade the databases to the appropriate version (if necessary)
 - ☐ Copy all new files from fileStorage\Documents
 - ☐ Bring all application servers online
 - ☐ Perform basic testing of reports
- Client Tasks:
 - ☐ Ensure end users can access the new system
 - Are DNS changes required?
 - Push out URL via Group Policies?
 - Update intranet links?
 - ☐ Update firewall/DMZ settings for eSuite/myCommunity servers
 - ☐ Ensure any disaster recovery solutions are migrated to new environment
 - ☐ Enjoy the new environment!

Cutover is scheduled for 4 hours and we can usually accommodate times **starting** from 7am till 5pm EST Monday thru Friday. Estimated times are based on how long it takes to backup your database, copy to the new servers and restore to the new servers. We will get a general idea of this time frame during the build process. Most migrations are completed with under 2 hours of downtime although your results may vary.

SUPPORT DURING AND AFTER THE PROJECT

If you have issues during testing or after migration, please make sure you contact the support center at **877.734.3315, option 2 (.NET Support) and options 5 (eSuite/Other)**. Anyone on the TSM staff will be able to assist you with your issue or get you in contact with someone that can. Technicians performing the migrations are scheduled resources and generally not available to assist with issues post-build.

QUESTIONS

Please bring any questions related to this project to the scheduled kick off meeting. If you have already had your kick off meeting, please include Scott Alan Miller: Scott.A.Miller@tylertech.com, Evan Agnello: Evan.Agnello@tylertech.com, and Steve Wojciuch: Steven.Wojciuch@tylertech.com on all communications.

Thank you,
The Tyler System Management Services Team