

New World ERP 2018.1

INSTALLATION GUIDE

June 22, 2018

Review important information for installing this release:

- ☐ Install Tyler Identity **before** installing New World ERP. Click [here](#) for guide.
- ☐ SSL is required for the New World ERP software. IIS needs to be configured to have the Default Web Site setup to have https binding enabled using port 443.
- ☐ Take a daily/hourly backup of the LogosRuntimeServices and HRReporting data-bases.
- ☐ "Additional Requirements" on page 2 (Microsoft .NET Framework 4.6 installed on application server).
- ☐ All user machines need .NET Framework 4 installed on them. (See "Additional Requirements" on page 2.)
- ☐ "IE ESC Settings on the Application Server" on page 2.
- ☐ "Installation Matrix" on page 3 shows where each piece of the software is to be installed.
- ☐ "Installing Community Development myCommunity" on page 34.
- ☐ "Managed Internet Update (MIU)" on page 39.
- ☐ "Appendix B: Product Registration" on page 42.
- ☐ Review hardware specs on Check.TylerTech.com.

Important requirements before and after applying this update to your production environment

Before applying this update to your production environment

- Apply the update to a **test environment first**. In terms of server configuration, the test environment should mirror the production environment as closely as possible.
- Refer to the application specific testing checklists to test key pieces of functionality and interfaces. Each time a new release or service pack is readied for deployment, New World thoroughly tests all parts of the software; however, due to the configurability of the applications and each customer's unique deployment environment, we strongly recommend that you use the testing checklists each time you apply a hardware or software update. Testing checklists may be found on Help Central (https://nwerphelp.tylertech.com/nwerp_help_2018.1/Content/Home.htm). From the home page, type "Testing Checklist" in the search field.
- Report to New World all problems that occur in the test environment so corrections can be made and confirmed in the test environment.

After applying this update to your production environment

- Revisit and re-execute the processes listed on the testing checklists, especially if there are significant differences between your production and test environments.
- Register the product on your application server.

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NEW WORLD ERP 2018.1 INSTALLATION GUIDE

This document provides details for installing the New World ERP 2018.1 Release. **Please review the complete chapter before beginning the installation.**

NOTE:

*If this is your first installation at this release level, we recommend that you go to Help Central (https://nwerphelp.tylertech.com/nwerp_help_2018.1/Content/Home.htm) to review the **Release Notes** and **What's New** pages, which will include more details about available features.*

Esri Support

New World ERP now supports Esri releases 10.2 through 10.5.1.

Release Requirements

Operating Systems

- Windows Server 2008 R2 (**last supported release**)
- Windows Server 2008 x64 with Service Pack 2 or later (**last supported release**)
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016

Databases

- SQL Server 2012 (**last supported release**)
- SQL Server 2014 (Database in 2012 Compatibility Level)
- SQL Server 2016 (Database in 2012 Compatibility Level)
- SQL Server 2017 (Database in 2012 Compatibility Level)

Client Machines (Please see the Technical Currency Matrix for more details on supported client operating systems)

- Windows 7
- Windows 8 and Windows 8.1
- Windows 10
- 4.14 macOS 10.12 Sierra
- 4.15 macOS 10.13 High Sierra

Browsers (Please see the Technical Currency Matrix for more details on supported client browsers)

- IE 11
- Edge
- Chrome
- Firefox
- Safari on Mac

New World ERP Releases

- 2017.1

**NOTE:**

Make sure year-end processing patch 2017.1.3 is applied to release 2017.1 before you upgrade to 2018.1.

Additional Requirements

- Microsoft .NET 3.5 and 4.6 on database and website hosting machine (Download site: <http://www.microsoft.com/en-us/download/details.aspx?id=48137>)
- Microsoft .NET 4.0 is required on client machines that make use of auto-printing to local laser printers in the following areas of the software:
 - Inventory Transaction-Issues
 - Revenue Collection Receipts
 - Collection Station Setup

Please note that this is only supported on Windows PCs and not Mac.

- Windows 2016 users may use Microsoft .NET 4.6, 4.6.1 and 4.6.2.
- JAVA JRE 8.X (64-bit) that is included with the Elasticsearch installer

IE ESC Settings on the Application Server

On the Application Server, IE ESC needs to be turned off for Administrator users according to the instructions provided on the following website:

<http://blogs.technet.com/b/chenley/archive/2011/03/10/how-to-turn-off-ie-esc.aspx>

This configuration may be done at any time, and the machine should be rebooted afterwards, if the configuration has not been done previously.

Installation Matrix

The chart below shows you where each piece of the software is to be installed, in the preferred install order:

Software	Required?	DB Server	Application Server	SSRS Server	eSuite Server	User Machine	Notes or Dependencies
AuditingSSRS_XX							
Auditing	Required	X					
SSRS Styling	Required			X			SSRS Server is likely the same machine as database server
HR Reporting Installer_XX	With Dependency (Left)	X	Follow Logos.NET Reporting Installer Guide				If using the Human Resources module
Tyler Identity	Needs to be installed before Main on an application server. A Tyler-specific server is recommended to host cross-product Tyler products.						
Elasticsearch_XX	Required	Needs to be installed before Main on the application server					Java is a prerequisite for Elasticsearch
Main_XX	Required		X				
LogosModule_XX	With Dependency (Left)		X				Must be licensed to Dynamic Reporting
FileStorageConversionTool	Not Required						Future Install
User-Defined Fields Excel Add-In	Optional					X	
FM Annual Budget Excel Add-In	Optional					X	
eSuite_XX		Follow eSuite Guide					
Service and Database	Not Required		X				
Website	Not Required				X		
CD_myCommunity	Required only if you are using the myCommunity mobile app				X		The installer has been updated to install the myCommunity service only
DSS-PROD-ReleaseXX	With Dependency (Left)	Follow DSS Install Steps					
ReportWriter_XX	With Dependency (Left)		X				Must be licensed to Report Writer
MIU	See MIU Administrator's Guide						
Tyler Transparency	Not Required	X					Feature must be licensed

Time Required to Install the Update

While the installation should go more quickly at most locations, please allow up to four hours of downtime for the update to be applied.

Before You Install

Before beginning the actual installation of the New World ERP update, it is important to perform the following steps:



NOTE:

You must install Tyler Identity before installing New World ERP. To view the Tyler Identity Installation Guide, click [here](#).

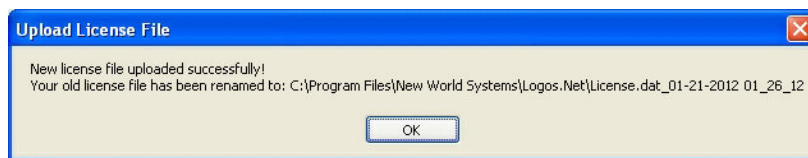
**NOTE:**

Please back up any custom DLL files (imports/exports) you may have before applying the release. These files are typically found in **{InstallDirectory}\Logos.Net\Custom**. They may need to be reapplied after the update.

**NOTE:**

For the steps in this section, if C:\ is not the drive on the application server where New World ERP is installed, use the letter that corresponds to the correct drive.

- 1 Request a new license key from New World ERP Product Support. Upon receipt, unzip the file and drag and drop it onto the licensing screen on the Management Console. You should see a message like the following:



- 2 Create a backup of your most recent database.
- 3 Create a copy of the File Storage folder in C:\Program Files\New World Systems\Logos.NET (or wherever New World ERP is installed). Place this copy outside of the New World Systems directory.
- 4 Have all users sign off of the system.
- 5 Stop the New World ERP Management Console on the application server.
- 6 Exit the console.
- 7 Stop the Caching Console.
- 8 Exit the console.
- 9 If your organization licenses eSuite, stop the eSuite website on the eSuite server, as it also points to the New World ERP database:
Open Internet Information Services (IIS) Manager.
In the **Connections** pane, open the **Sites** folder.
Right-click **Default Web Site** to open drop-down menu.
Point to **Manage Web Site**.
Click **Stop**.

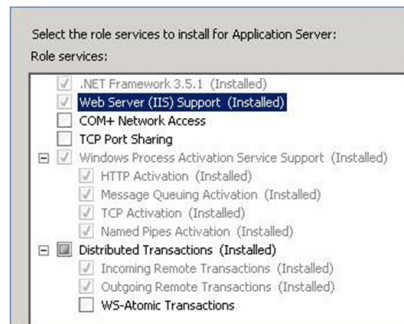
Hardware Recommendations

To review hardware recommendations for this release, please navigate to <https://check.tylertech.com>. Use your personal email address and a password of Tyler to log in. Clicking on *New World ERP* will get you to the hardware recommendations.

Windows Server 2008/2008 R2 Server Setup

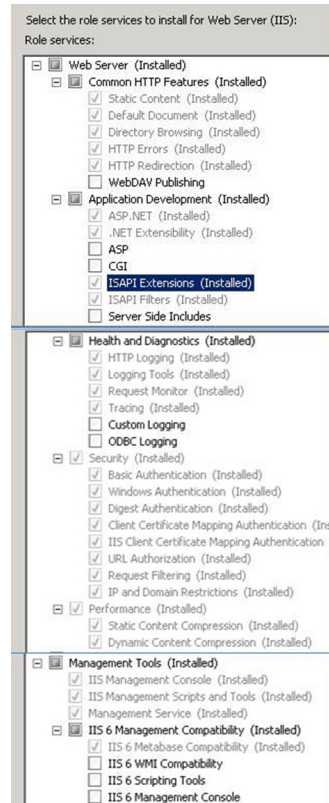
Application Server Role

- 1 Run Server Manager.
- 2 In Server Manager, verify the Application Server Role has the following services installed (note that Windows Server 2008 does not have the .NET Framework 3.5.1 option):



Web Server (IIS) Role

- 1 Run Server Manager.
- 2 In Server Manager, verify the Web Server Role has the following services installed:



Installing Message Queuing (MSMQ) and Other Features



NOTE:

Install message queuing if you are installing 8.X for the first time.

- 1 Run Server Manager:

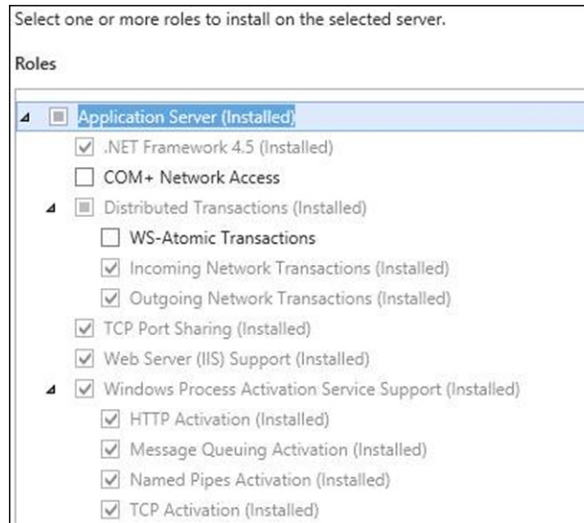


- 2 In Server Manager, click **Features**.
- 3 In the right-hand pane under **Features Summary**, click **Add Features**.
- 4 In the resulting window, expand **Message Queuing**.
- 5 Expand **Message Queuing Services**.
- 6 Click **Directory Services Integration** (for computers joined to a Domain), then click **HTTP Support**.

Windows Server 2012 Server Setup

Application Server Role

- 1 Run Server Manager.
- 2 In Server Manager, verify the Application Server Role has the following roles installed:



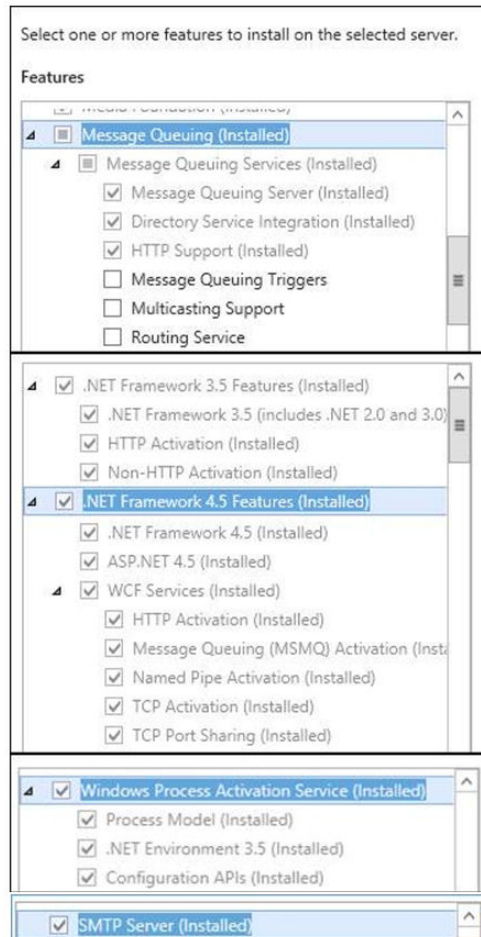
Web Server (IIS) Role

- 1 Run Server Manager.
- 2 In Server Manager, verify the Web Server Role has the following roles installed:



Installing Message Queuing (MSMQ) and Other Features

- 1 Run Server Manager.
- 2 In Server Manager, verify the following features are installed:



Windows Server 2016 Server Setup

- 1 Run Server Manager.
- 2 Select Manage > Add Roles and Features.

3 Under **Server Roles**, verify the Web Server (IIS) role has the following installed:

Select one or more roles to install on the selected server.

Roles

- ☒ **Web Server (IIS) (31 of 43 installed)**
 - ☒ **Web Server (29 of 34 installed)**
 - ☒ **Common HTTP Features (5 of 6 installed)**
 - ☒ Default Document (Installed)
 - ☒ Directory Browsing (Installed)
 - ☒ HTTP Errors (Installed)
 - ☒ Static Content (Installed)
 - ☒ HTTP Redirection (Installed)
 - ☐ WebDAV Publishing
 - ☐ Health and Diagnostics (4 of 6 installed)
 - ☒ Performance (Installed)
 - ☒ Security (Installed)
 - ☒ **Application Development (9 of 11 installed)**
 - ☒ .NET Extensibility 3.5 (Installed)
 - ☒ .NET Extensibility 4.6 (Installed)
 - ☒ Application Initialization (Installed)
 - ☐ ASP
 - ☒ ASP.NET 3.5 (Installed)
 - ☒ ASP.NET 4.6 (Installed)
 - ☐ CGI
 - ☒ ISAPI Extensions (Installed)
 - ☒ ISAPI Filters (Installed)
 - ☒ Server Side Includes (Installed)
 - ☒ WebSocket Protocol (Installed)
 - ☐ FTP Server
 - ☒ **Management Tools (2 of 7 installed)**
 - ☒ IIS Management Console (Installed)
 - ☒ **IIS 6 Management Compatibility (1 of 4 installed)**
 - ☒ IIS 6 Metabase Compatibility (Installed)
 - ☐ IIS 6 Management Console
 - ☐ IIS 6 Scripting Tools
 - ☐ IIS 6 WMI Compatibility
 - ☐ IIS Management Scripts and Tools
 - ☐ Management Service

4 Under **Features**, verify the following features are installed:

Features

- ☒ **.NET Framework 3.5 Features (Installed)**
 - ☒ .NET Framework 3.5 (includes .NET 2.0 and 3.0)
 - ☒ HTTP Activation (Installed)
 - ☒ Non-HTTP Activation (Installed)
- ☒ **.NET Framework 4.6 Features (Installed)**
 - ☒ .NET Framework 4.6 (Installed)
 - ☒ ASP.NET 4.6 (Installed)
 - ☒ **WCF Services (Installed)**
 - ☒ HTTP Activation (Installed)
 - ☒ Message Queuing (MSMQ) Activation (Installed)
 - ☒ Named Pipe Activation (Installed)
 - ☒ TCP Activation (Installed)
 - ☒ TCP Port Sharing (Installed)
- ☒ **Message Queuing (6 of 7 installed)**
 - ☒ **Message Queuing Services (Installed)**
 - ☒ Message Queuing Server (Installed)
 - ☒ Directory Service Integration (Installed)
 - ☒ HTTP Support (Installed)
- ☒ **Windows Process Activation Service (Installed)**
 - ☒ Process Model (Installed)
 - ☒ .NET Environment 3.5 (Installed)
 - ☒ Configuration APIs (Installed)

Setting up Account to Run Application Service

Create User (on a new application server; a domain user can be used if it is explicitly part of the administrator's group on the server)

- a Open Computer Management.
- b Expand the tree to: *Computer Management\System Tools\Local Users and Groups\Users*
- c On the Action menu, click **New User**.
- d Type the appropriate information in the dialog box.
- e Clear the check box for *User must change password at next logon*.
- f Check *Password never expires*.



NOTE:

The user who will run the application service should be set up as someone other than "Administrator," or whatever name typically is used to log into the system.

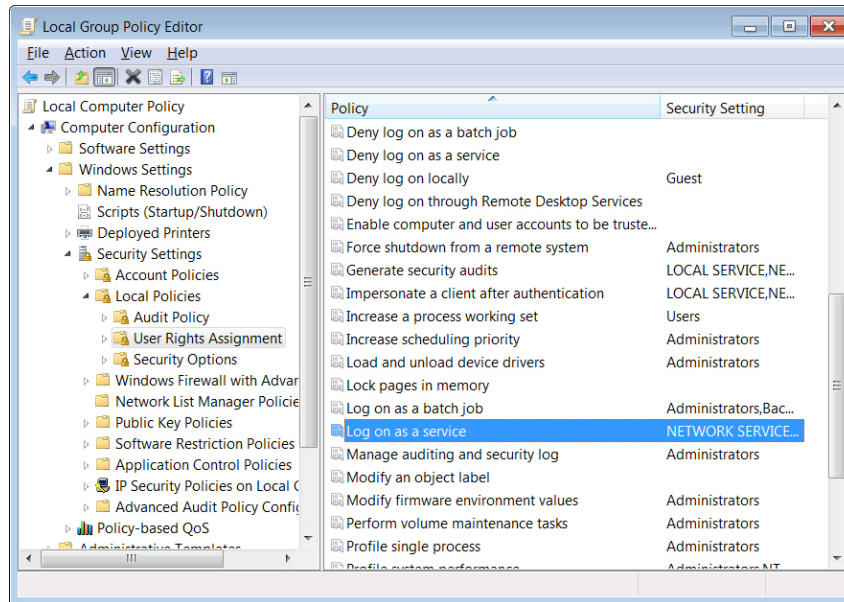
Add to Administrator's Group (on a new application server)

- a Open Computer Management.
- b Expand the tree to: *Computer Management\System Tools\Local Users and Groups\Groups*
- c Right-click on the Administrators group and select *Add to Group*.
- d Click **Add**.
- e Type the name of the user you just created or one that already existed.
- f Click **Check Names**.
- g Once valid, click **OK**.
- h Click **OK** again.

Set up Account to Run Windows Service (on a new application server)

- 1 Click **Start**, then run.
- 2 Type **gpedit.msc**.
- 3 Press **<Enter>**.

- 4 Select Computer Configuration > Windows Settings > Security Settings > Local Policies > User Rights Assignment:



- 5 Double-click **Log on as a service** policy.
- 6 Click **Add User or Group**.
- 7 Enter the account that will be running the service.
- 8 Click **OK**.

**NOTE:**

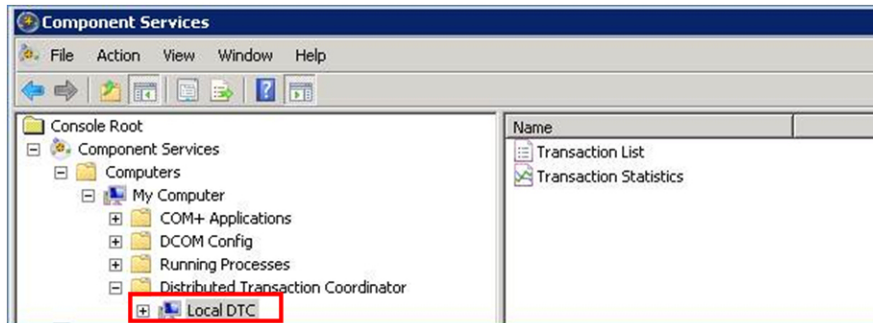
The user needs to log into this account at least once.

Setting up Microsoft Distributed Transaction Coordinator

To have network access enabled, Microsoft Distributed Transaction Coordinator (MS DTC) must be set up. Follow the below steps to enable network access:

- 1 Click **Start**, then **Run**.
- 2 Type `dcomcnfg`.

- 3 Expand the console tree to locate **Local DTC** (e.g. Component Services > Computers > My Computer > Distributed Transaction Coordinator > Local DTC).



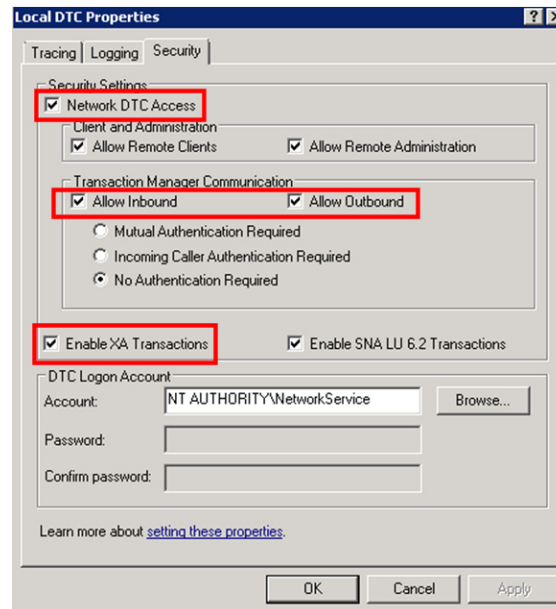
- 4 On the Action menu, click **Properties**.
- 5 Click the **Security** tab and verify that the following options are enabled:

Network DTC Access

Allow Inbound

Allow Outbound

Enable XA Transactions



- 6 Ensure the database server has had steps 1-5 applied as well.

Windows Firewall Settings

- 1 On the App/Web and DB Server, browse to Control Panel > Administrative Tools > Windows Firewall with Advanced Security, or navigate through Server Manager > Tools.

- 2 Inbound Rules: All three components beginning with "Distributed Transaction Coordinator Inbound Rules" must be enabled. Right-click on each component and select **Enable Rule**.
- 3 Outbound Rules: Enable **Distributed Transaction Coordinator Outbound Rule**.

Installation Scenarios

Your organization's setup will determine how you will need to install the update. There are three possibilities:

- **Application Server, Web Server and Database Server on the same machine.** In this scenario, the entire installation will be performed on only one box. **Please note: This scenario is not recommended.**
- **Application Server and Web Server on the same machine. Database Server on a different machine.** In this scenario, the installation will be performed on one box. Auditing SSRS would be the only piece installed on the database server.
- **Application Server and Web Server on separate machines.** In this scenario, the update will need to be run on each box. The prompts you receive will be different on each box. NOTE: This scenario is possible but typically not used.



NOTE:

For instructions on downloading the update, refer to Appendix A.

Auditing and SSRS

Before the update is installed, a script needs to be run that will install auditing for Financial Management and Human Resources and a .dll file that is used for styling and formatting when SSRS reports are deployed. The installer is located in an AuditingSSRS folder that is included with the installation.



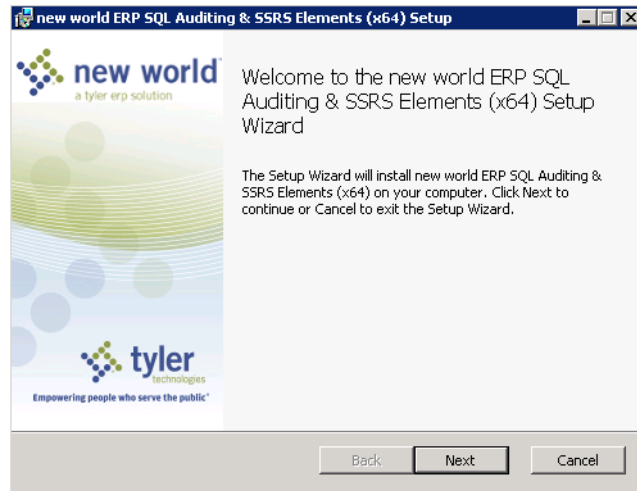
NOTE:

The new Auditing and SSRS installer handles updating multiple databases with auditing triggers.

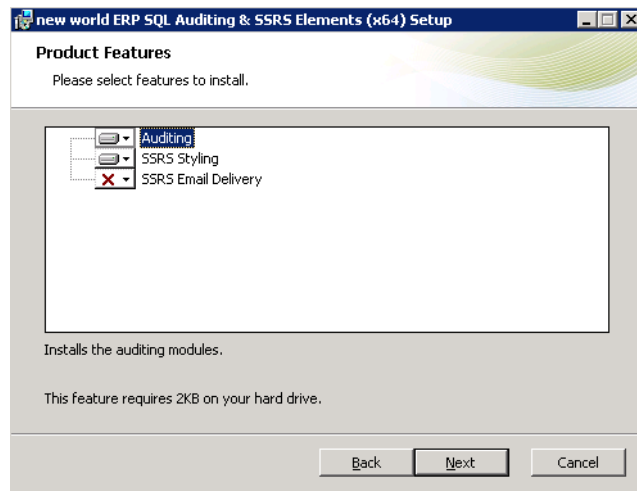
The installer needs to be run on the machine that houses the SQL database and on the machine that houses the report server. If these are on the same machine, the installer needs to be run only once.

Two versions of the installer are available. If the server is running with a 32-bit version of SQL Server Reporting Services, select the *LOGOAuditingSSRS_x86.msi* file. If the server is running with the 64-bit version of SQL Server Reporting Services, select the *LOGOAuditingSSRS_x64.msi* file.

- 1 Double click the *LOGOSAuditing SSRS* executable to select it. You will see the following introductory screen:

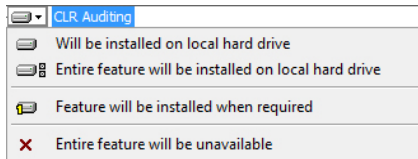


- 2 Click **Next**. You will see the following screen:



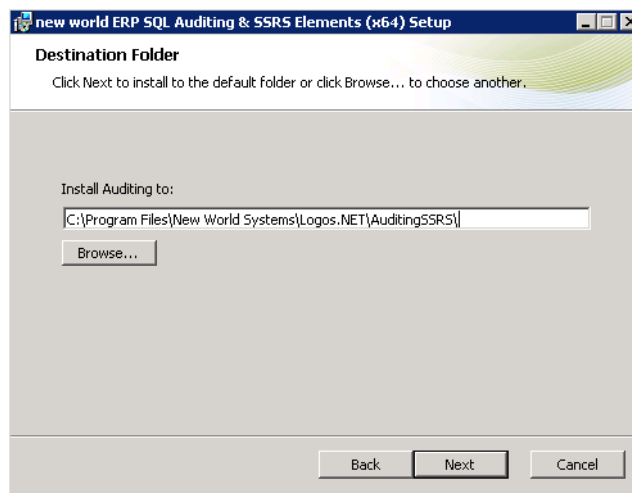
- 3 If your SQL database and report server are on the same machine, select the **Auditing** and **SSRS Styling** features. If interested in configuring SSRS to send email reports, select the **SSRS Email Delivery** feature to be installed (please note that this feature is not necessary if email settings have already been configured in the Reporting Services Configuration Manager). Refer to the SSRS documentation for steps needed to create subscriptions that send reports through email.
- 4 If your SQL database and your report server are on separate machines, select the correct process for the machine you are on: **Auditing** for the machine with the SQL data-

base or **SSRS Styling** for the machine with the report server. Expand the option by clicking the arrow to the left of the label:

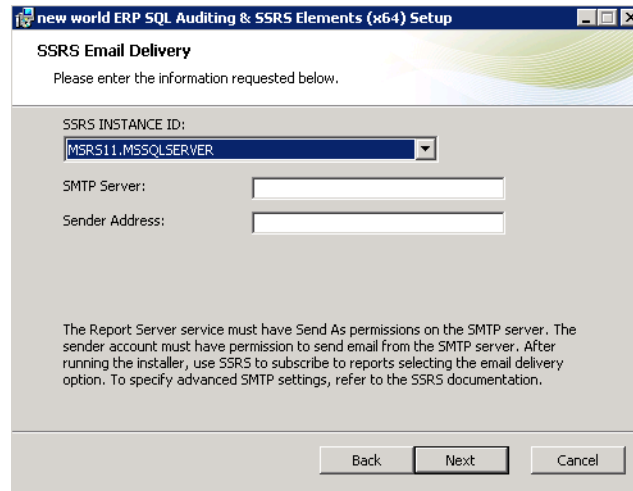


If interested in configuring the SSRS server to send email reports, select the **SSRS Email Delivery** feature to be installed (please note that this feature is not necessary if email settings have already been configured in the Reporting Services Configuration Manager). Refer to the SSRS documentation for steps needed to create subscriptions that send reports through email.

- 5 The **Will be installed on the local hard drive** option is the default. Use the default if you plan to install the selected item. For the item you are not installing, expand the list and select the **Entire feature will be unavailable** option. Click **Next** to go to the following screen:

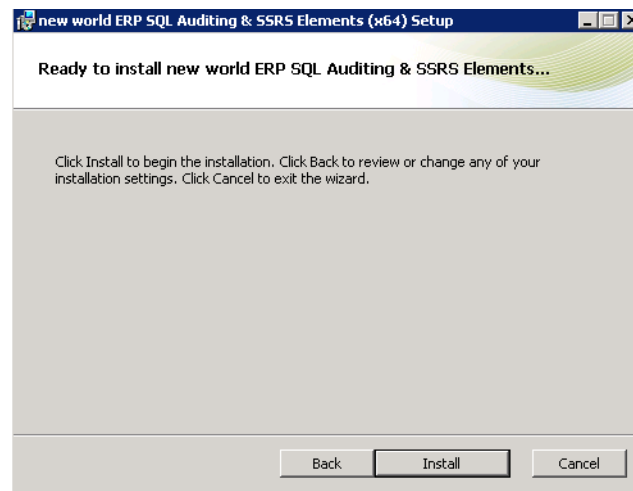


- 6 Click **Next** to go to the following screen if the **SSRS Email Delivery** feature was selected:



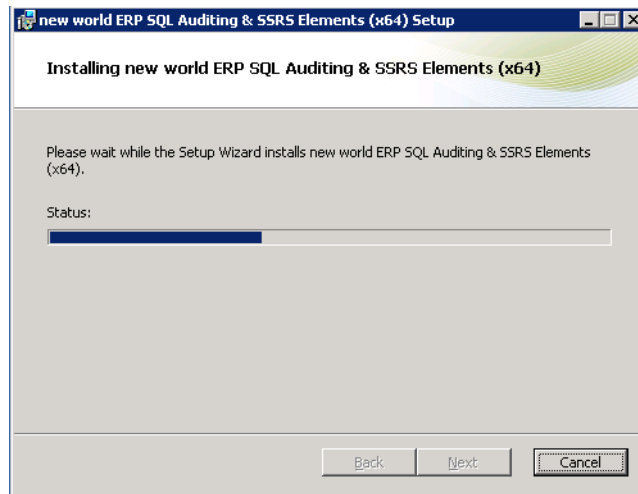
The screenshot shows the 'new world ERP SQL Auditing & SSRS Elements (x64) Setup' window. The title bar is blue with the New World ERP logo. The window has a light gray background. At the top, it says 'SSRS Email Delivery' and 'Please enter the information requested below.' Below this, there is a dropdown menu for 'SSRS INSTANCE ID:' with 'MSRS11.MSSQLSERVER' selected. There are two text input fields: 'SMTP Server:' and 'Sender Address:'. Below these fields, there is a paragraph of text: 'The Report Server service must have Send As permissions on the SMTP server. The sender account must have permission to send email from the SMTP server. After running the installer, use SSRS to subscribe to reports selecting the email delivery option. To specify advanced SMTP settings, refer to the SSRS documentation.' At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'.

- 7 Select the appropriate *SSRS INSTANCE ID* and enter the *SMTP Server* and *Sender Address*. Click **Next** to go to the following screen:

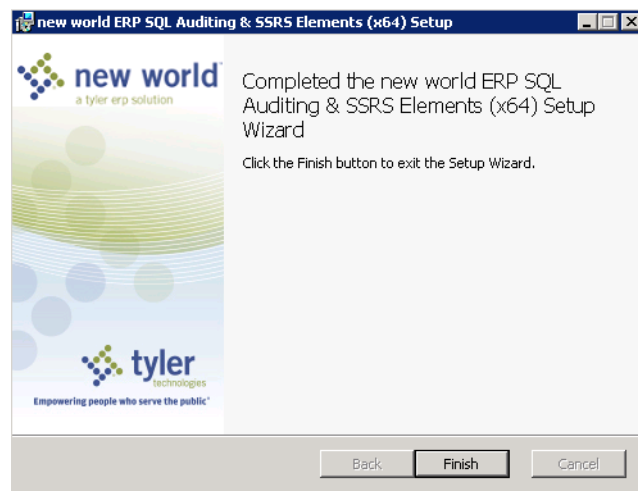


The screenshot shows the 'new world ERP SQL Auditing & SSRS Elements (x64) Setup' window. The title bar is blue with the New World ERP logo. The window has a light gray background. At the top, it says 'Ready to install new world ERP SQL Auditing & SSRS Elements...'. Below this, there is a paragraph of text: 'Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.' At the bottom, there are three buttons: 'Back', 'Install', and 'Cancel'.

- 8 Click the **Install** button. You will see the following screen while the install progresses:

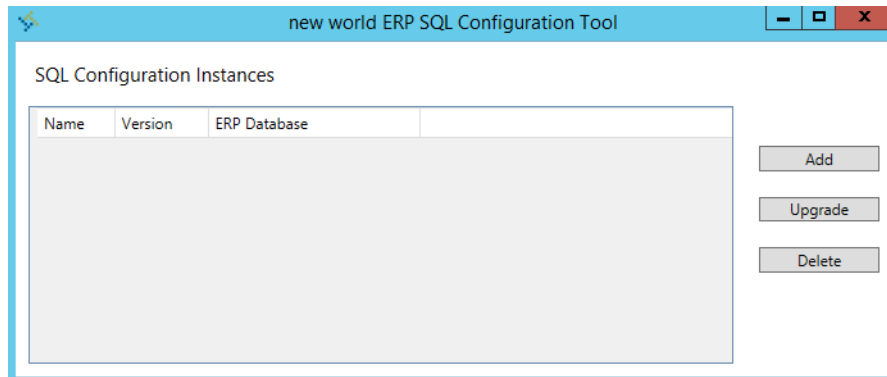


- 9 When the installation is complete, you will see the following screen:

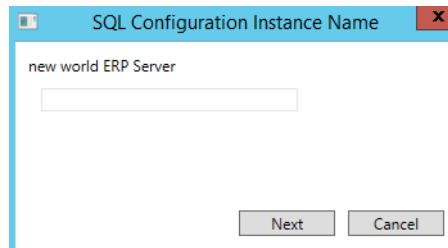


- 10 Click **Finish** to complete the installation.

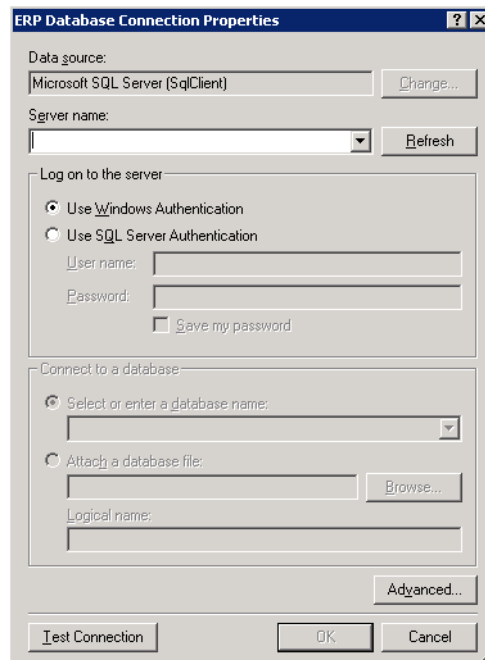
If the auditing feature was installed, the SQL Configuration Tool will be launched. This tool will be used for tasks such as enabling auditing. The tool also may be found under All Programs > Tyler Technologies > SQL > SQL Configuration Tool:



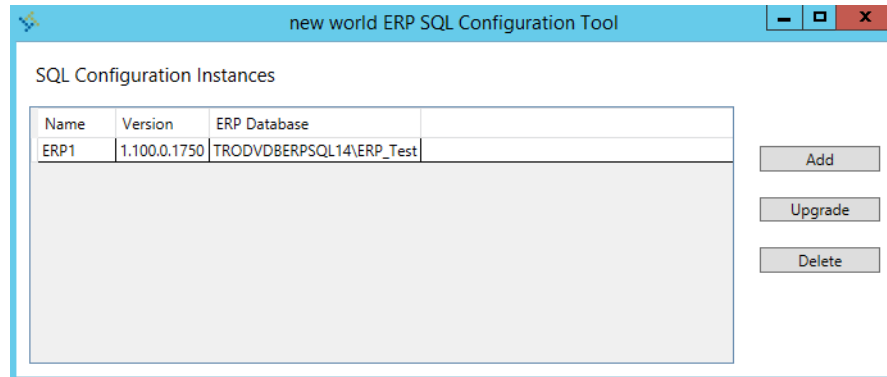
- 11** Click the **Add** Button. A dialog will display, requesting the New World ERP Server:



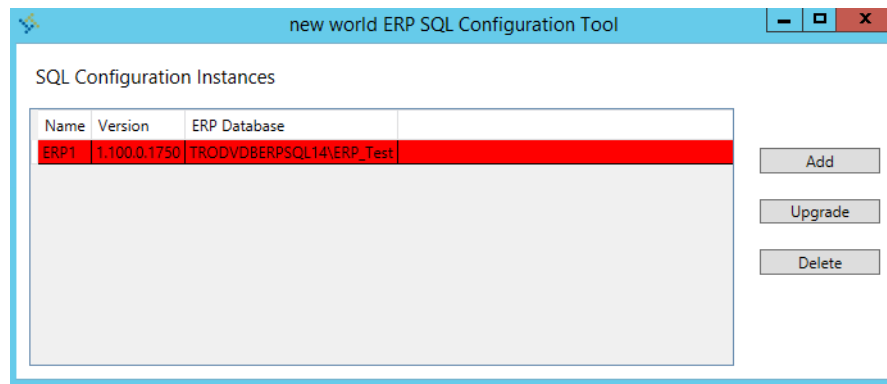
- 12** Enter the ERP server and click the **Next** button. The ERP Database Connection dialog will display:



- 13** Fill in the information requested for the ERP database and click the **OK** button. A new instance will be created that will modify the ERP database (e.g. enable auditing):



- 14** Additional instances can be added to target other ERP databases (e.g. training and live) by following the above steps. If a newer version of the software has been installed, the current instance(s) may be upgraded. As shown below, all instances that are not at the latest version will be highlighted in red:



- 15** Select the instance that will be upgraded and click the **Upgrade** button. A confirmation dialog will display.
- 16** Click the **Yes** button and the instance will be upgraded.

To delete an instance, select it and click the **Delete** button. Click the **Yes** button and the instance will be deleted.



NOTE:

The SQL Agent will now be started and have the start mode set to automatic.

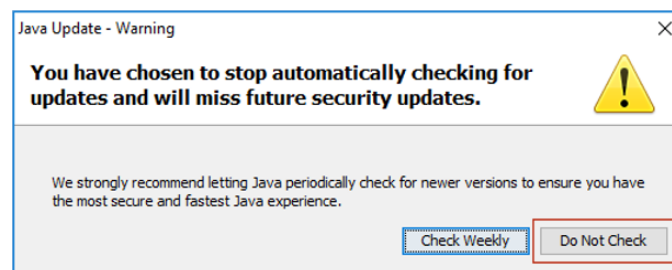
Reporting

Human Resources/Payroll customers without a previous install of the New World ERP Reporting Installer will need to install the New World ERP Reporting Installer before running the update. Please see the *New World ERP Reporting Installer Guide* for additional information. The New World ERP Reporting Installer first appeared in release 9.0 SP2.

Elasticsearch

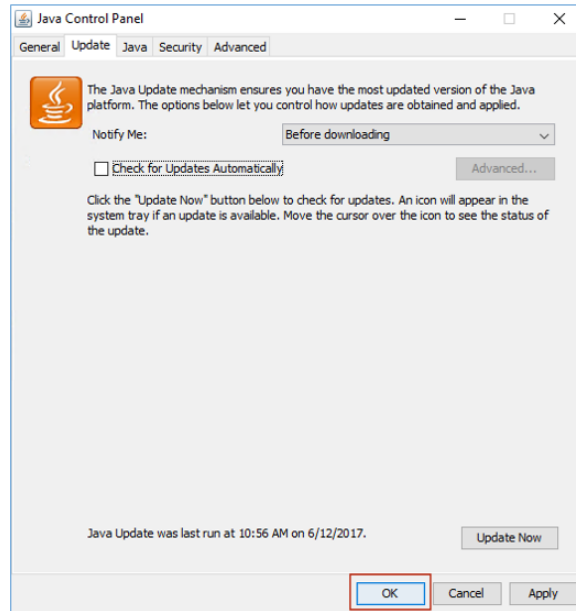
Installing Java:

- 1 Under the **Elasticsearch-REL_XX** folder, open the **Prereqs > Java** folder.
- 2 Double-click the **jre-<version (e.g. 8u111)>-windows-x64.exe** file.
- 3 Click the **Install** button.
- 4 Click the **Close** button after the Java software has been installed.
- 5 Open the Java Control Panel.
- 6 Click the **Update** tab.
- 7 Deselect the *Check for Updates Automatically* check box. A Java Update - Warning dialog will appear:



- 8 Click the **Do Not Check** button to prevent Java from updating without consent.
- 9 Click **Apply**.

- 10 Click **OK** to close the control panel:



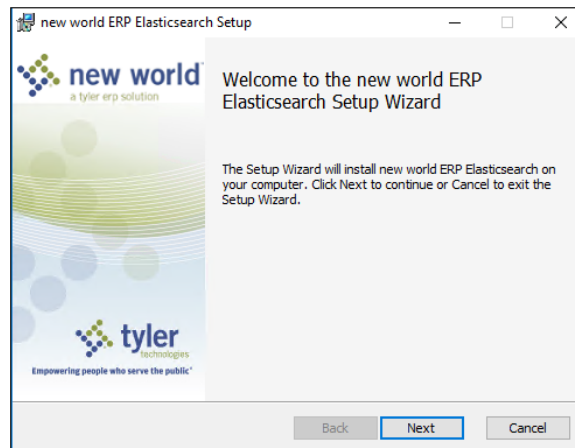
- 11 Any time the Java software is upgraded, please run the ERP Java Updater Tool, **ERP-JavaUpdater.exe**, to reconfigure the New World ERP software to work with the latest version of Java. The tool can be found in the **ERPJavaUpdater** folder that is included with the Java installer. Click the **Start** button to start reconfiguring the ERP software.

Installing Elasticsearch

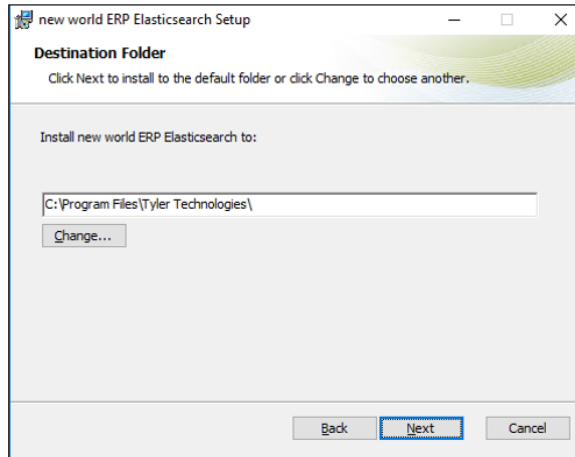
NOTE:

The Elasticsearch installer should **not** be installed under a path that includes the closing parenthesis character)--for example, C:\Program Files(x86)\Elasticsearch.

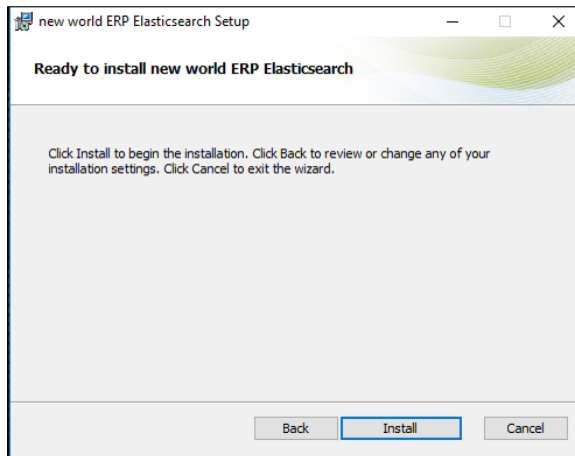
- 1 Return to the **Elasticsearch-REL_XX** folder and double click the **setup.exe** file. You will see the following screen:



- 2 Click **Next**. The Destination Folder dialog will open:



- 3 If you do not want to accept the default location, click the **Change** button to select another location.
- 4 Click **Next**. The dialog to begin the installation will open:



- 5 Click **Install** to begin the installation.
- 6 Once the installation is complete, click the **Finish** button.

NOTE:

The Elasticsearch installer will uninstall the CD installer.

Installing the Update

Once the software has been downloaded, it must then be installed on the application server.

Installing Tyler Identity



NOTE:

You must install Tyler Identity before installing New World ERP. To view the Tyler Identity Installation Guide, click [here](#).

Installing Prerequisite Software



NOTE:

*Install the prerequisite software **only** if it is not already installed. The software, if installed, will be listed under Programs and Features as **Erlang OTP 17 (6.0)**, **RabbitMQ Server** and **Microsoft SQL Server 2012 Native Client**.*

- 1 Open the **Main > Prereqs > Erlang** folder.
- 2 Double-click the *otp_win64_17.0.exe* file if running on a 64-bit operating system; otherwise, run *otp_win32_17.0.exe*.
- 3 Keep the default selected components and install.
- 4 Open the **Main > Prereqs > RabbitMQ** folder.
- 5 Double-click the *rabbitmq-server-3.3.0.exe* file.
- 6 Select all components to be installed and install.
- 7 Open the **MAIN > Prereqs > SQL Server 2012 Native Client** folder.
- 8 Double-click the *sqlncli_x64.msi* file.
- 9 Keep the default selected components and install.

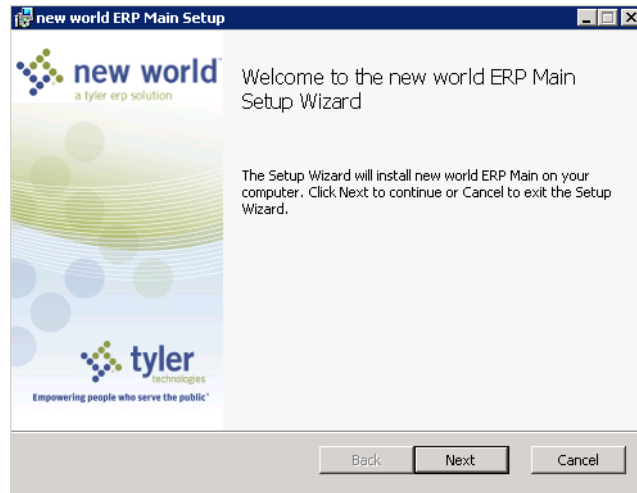


NOTE:

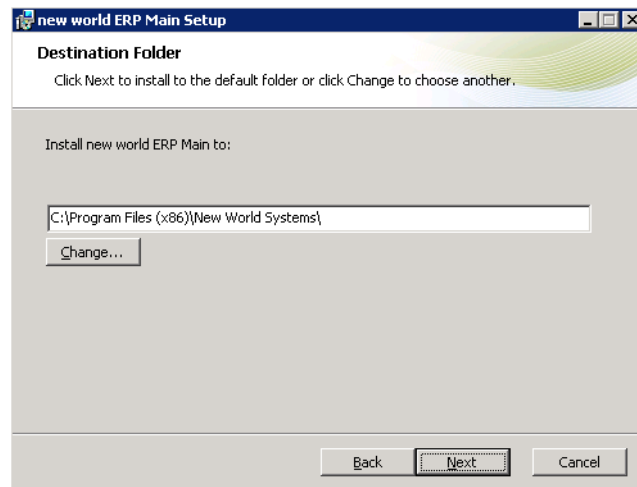
If you are using AppAssure version 5.4, the AppAssure Agent Service should be stopped prior to the upgrade.

Installing ERP

- 1 Open the **Main** folder.
- 2 Double-click the *setup.exe* file to start the installer. (**Please note the user running the installer must have admin rights.**) You will see the following screen:

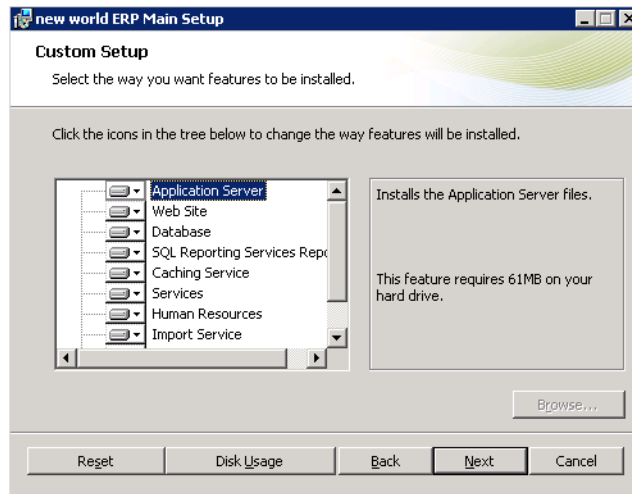


- 3 Click **Next**. The Destination Folder dialog will open:



- 4 If you prefer, you may use this dialog to change the install location of the software.

- 5 Click **Next**. You will see the following screen:



- 6 Select the desired software features. A typical installation on an application server would have all features except *Faxing Service* and *Esri ArcGIS API* selected.

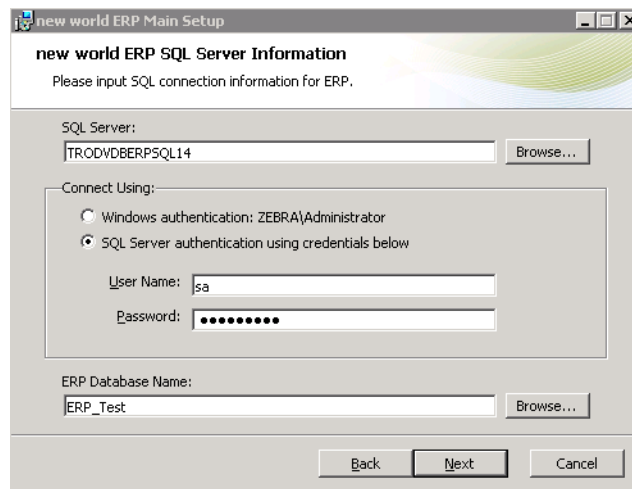
NOTE:

The **Human Resources** feature should only be selected if you are a Human Resources/Payroll customer.

WARNING:

If you are not sure which components should be selected for this installation, contact Customer Support at 877-734-3315 before continuing.

- 7 Click **Next**. You will see the following screen:



 NOTE:

If you switch from the default SQL Server Authentication to Windows Authentication, clear any values in the SQL Server field; otherwise, database errors will result. Most sites will use SQL Server Authentication.

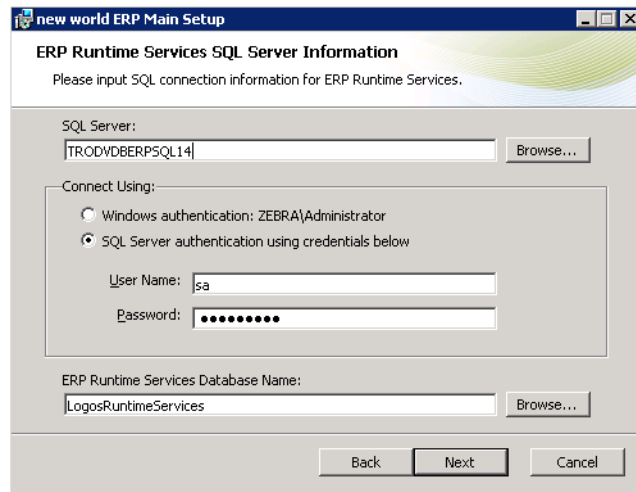
 NOTE:

If you are unsure about the verification of your database backup, contact Customer Support at 877-734-3315 before continuing. As the message above indicates, the changes made to the database as a result of the installation cannot be rolled back without a database backup.

 NOTE:

Releases in 2018.1 will require SQL 2012, 2014, 2016 or 2017.

- a In the *SQL Server* field, enter or select the name of the database server.
 - b Select SQL server authentication and enter the *User Name* and *Password* of the user that has administrator rights over the ERP database.
 - c In the *ERP Database Name* field, enter or select the name of the database that you are updating.
- 8 Click **Next**. You will see the following screen:



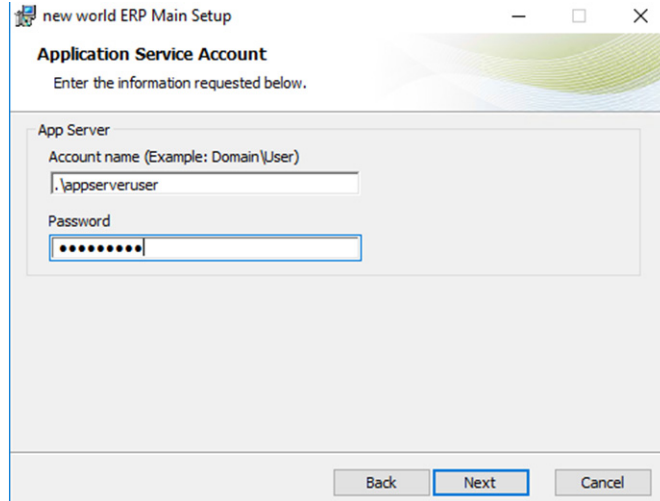
- a In the *SQL Server* field, enter or select the name of the database server.

 NOTE:

The SQL user must have rights to create a database.

- b Select *SQL server authentication using credentials below* and enter the *User Name* and *Password* of the user who has administrator rights over the ERP Runtime Services database.

- c The ERP Runtime Services database will be created during the install if it does not already exist. The default name of the database is *LogosRuntimeServices*.
- 9 Click **Next**. You will see the following screen if you selected the Application Server feature in Step 6:



The user the application server is running as needs to be an administrator; consequently, a local Administrator account can be created and logged into at least once. Domain users can also be used; however, it is not recommended to use the domain/administrator account:

- a In the *Account name* field, enter the account that will run the Application service (e.g., Domain\User). The account must have rights to run a Windows service. Please refer to “Set up Account to Run Windows Service (on a new application server)” on page 1-19 for steps on how to add rights to an account to run a Windows service.



NOTE:

For the domain, use a logical name rather than an IP address. Do not use localhost.

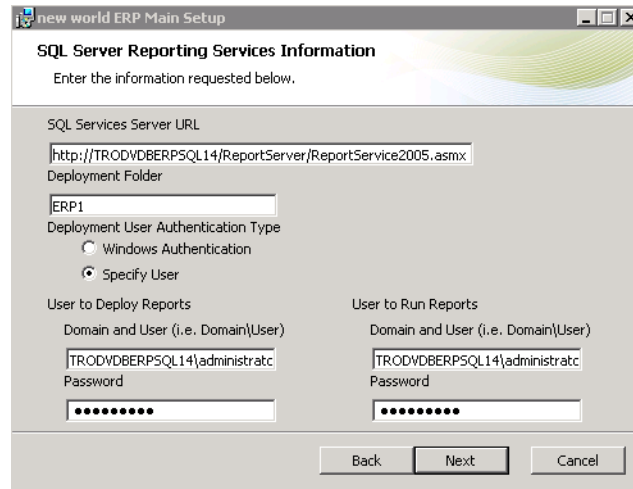
- b In the *Password* field, enter the password of the account.



NOTE:

The double quotation mark character (") cannot be used in the account password. The dash character (-) is also not supported in passwords due to issues in SQL's DTUtil utility.

- 10 Click **Next** to continue. You will see the following screen if the SQL Reporting Services Reports feature was selected:



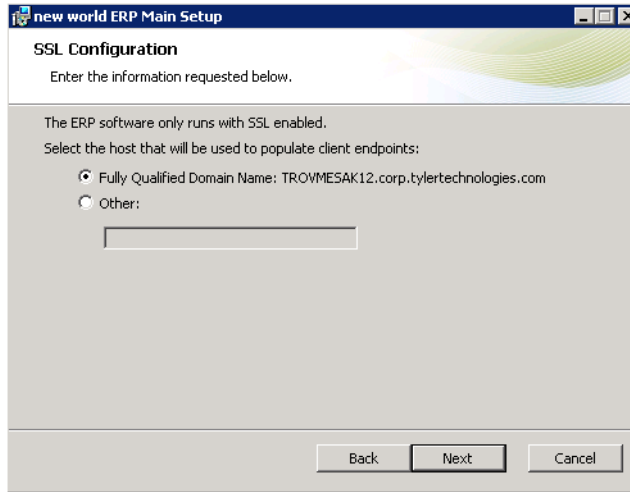
- a The *SQL Services Server URL* is the URL to the SSRS server's ReportService2005 web service. The full URL will be filled in for you by typing in just the name of a server (e.g., DBServer) and clicking **Next** (URL should be http://<reportingServer-Name>/ReportServer/ReportService2005.aspx). **The “2005” in the name is correct and should not be changed.**

NOTE:

If the SSRS server is configured to use SSL, update the SSRS URL to be in the following format: https://<SSRS Server Using Fully Qualified Domain Name>/ReportServer/ReportService2005.aspx.

- b The *Deployment Folder* field holds the name of a folder on the SSRS server to publish the reports to. The folder does not have to currently exist. By publishing reports to a specific folder, the same SSRS server can be used by multiple ERP installations. Give this folder the name of the application server you are installing it on (e.g., City of New World ERP - Test). This will keep your live and test environments separate.
- c The *Deployment User Authentication Type* field is used to select the authentication method to use against the SSRS server when deploying the reports. Choose Windows Authentication only if the currently logged on user has Publisher rights on the SSRS server. Otherwise, choose Specify User.
- d If you have selected **Specify User** as the authentication type, enter values in the *Domain And User* and *Password* fields under the section, **User to Deploy Reports**. Enter the *Domain and User* value as domain\user.
- e Enter values in the *Domain And User* and *Password* fields under the section **User to Run Reports**. Enter the *Domain and User* value as domain\user. This should be the same as the previous *Domain and User* and *Password* values entered.

- 11 Click **Next**. If you are installing the website feature, the following dialog will be displayed during the UI sequence:



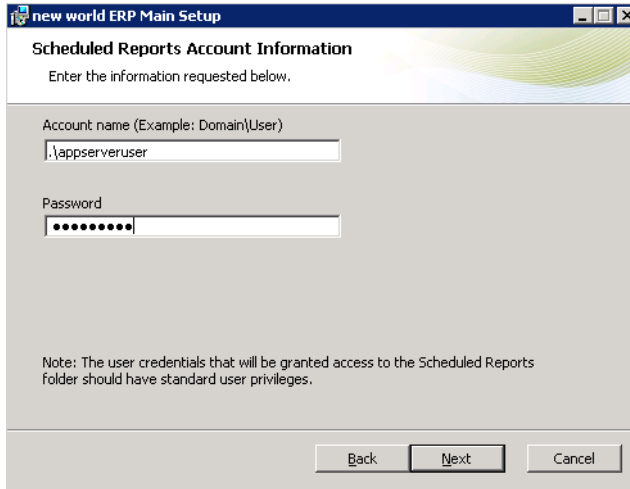
Select the default FQDN or enter a custom hostname.



NOTE:

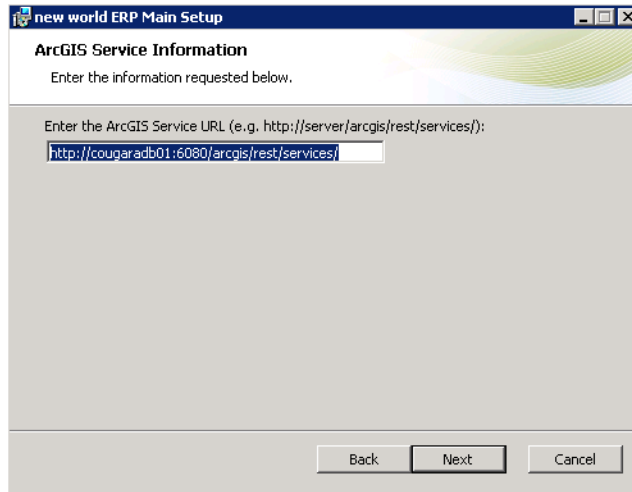
IIS needs to be configured to have the Default Web Site setup to have https binding enabled using the certificate on port 443.

- 12 Click **Next**. If you are installing the website feature, the following dialog will be displayed:



Type the name of a user who has rights to the SSRS and ERP Website servers. The purpose of this user is to be able to deploy any scheduled report to an ERP user's myReports, which will happen when a user schedules a report and provides a distribution group. The SSRS server will drop the report files into a shared location on the web site server using the account credentials entered.

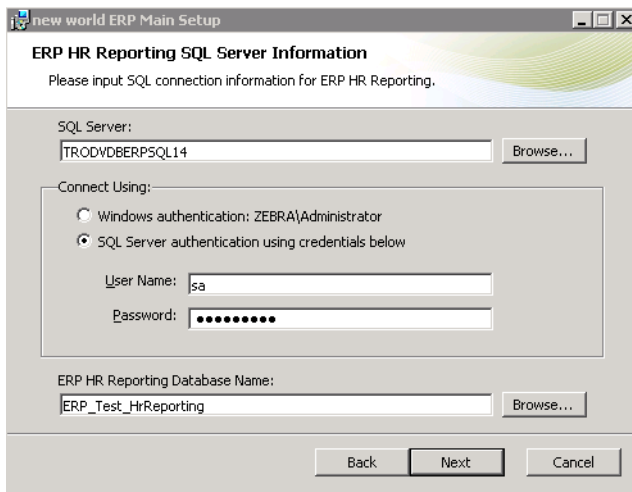
- 13** Click **Next**. If *Esri ArcGIS API* was selected for installation, you will see the following screen:



 NOTE:

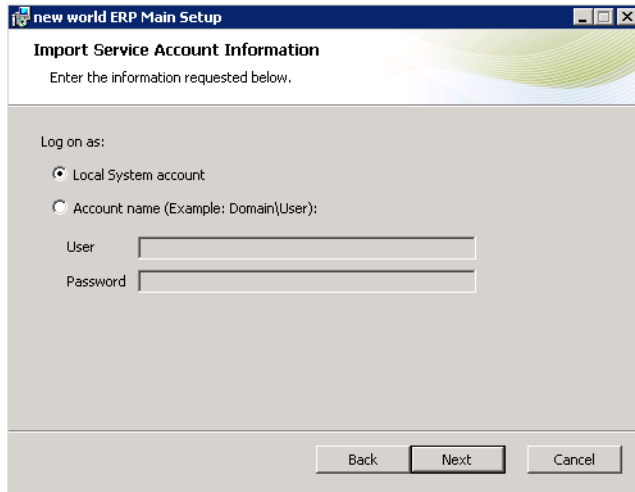
New World ERP now supports Esri releases 10.2 through 10.5.1. As a result of the upgraded support, the original ArcGIS Service location no longer is valid. Please use the new RESTful service location.

- 14** Click **Next**. If the Human Resources feature was selected for installation, you will see the following screen:



- a** In the *SQL Server* field, enter or select the name of the database server.
- b** Select the authentication type. If selecting **SQL Server authentication**, enter the *User Name* and *Password*.
- c** In the *ERP HR Reporting Database Name* field, enter or select the name of the HR Reporting database.

- 15 Click **Next**. If the **Import Service** feature was selected for installation, you will see the following screen:

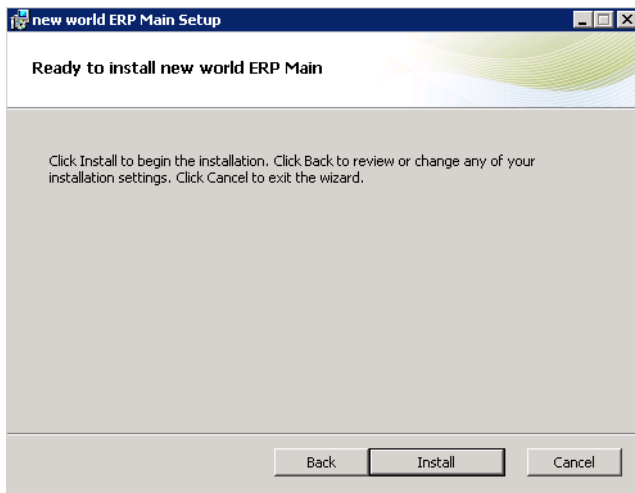


NOTE:

The import service must be installed to take advantage of the scheduled service import feature for Journals, Revenue Collections Receipt Batches, and Accounts Payable Invoice Batches. You do not need to install the service unless you plan to use the scheduled service import feature.

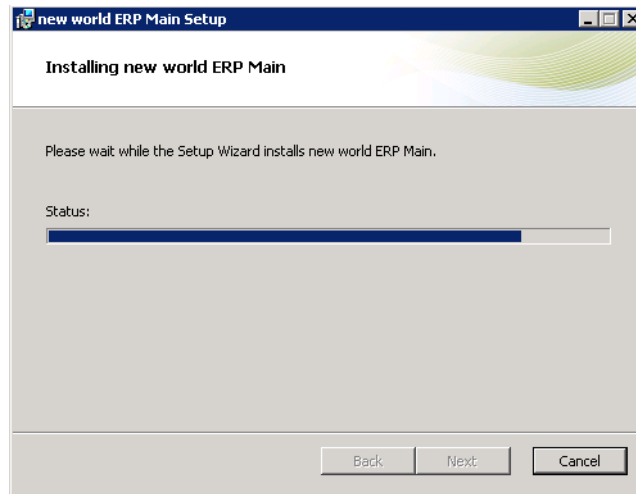
If the default value, **Local System Account**, is chosen, the service can access only the local drives for the machine it is installed on; therefore, the import folder that must be defined when the scheduled service is set up must also be local. If your organization plans to set up the import folders on another machine, select the **Account Name** option and specify a domain *User* and *Password*.

- 16 Click **Next**. You will see the following screen:

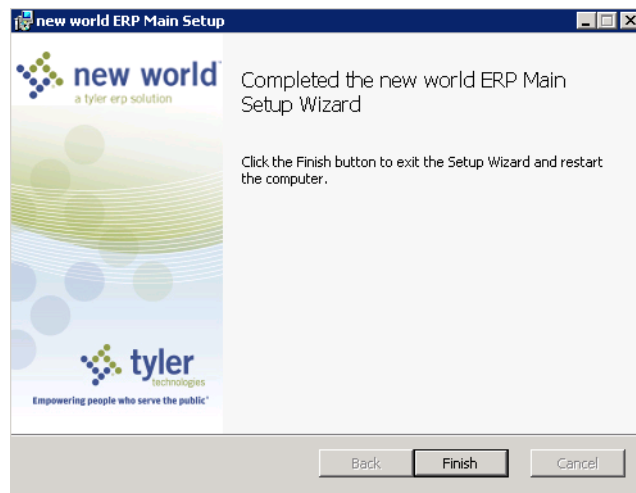


- 17 Click **Install**. The following processes will be indicated as they are performed: removing old application server files, installing new application server files, removing previ-

ous website files, installing new website files, removing old script files, decompressing and copying new script files, and deploying SSRS reports:



Once all the processes are complete, you will see the following screen:



NOTE:

*If SQL or SSRS report deployment errors/warnings have occurred, the screen will display a **Show Errors** button. Clicking the button will display the errors/warnings in Notepad. If SSRS subscriptions are used and the parameters change for a report, a warning will be returned in the SSRS error log file along with the subscription settings; the subscriptions will need to be recreated for the identified reports. Errors are not expected and should be reported to Customer Support at 877-734-3315.*

18 Click Finish.

NOTE:

See Appendix B for information on the product registration process following installation.

Installing Community Development myCommunity

The myCommunity software needs to be installed only if you are using the myCommunity Mobile application.

Installer Prerequisites



NOTE:

If you are using the myCommunity Mobile app, an SSL certificate is required, and the IIS Default Web Site must be configured to have https binding enabled.

- Microsoft .NET 3.5 and 4.6

Administrator Guide

Before running the CD Installer, please read the *Community Development System Administrator's Guide.pdf*.

Install Sequence

After you have reviewed the *Community Development System Administrator's Guide*, follow the steps below to install the New World ERP Community Development software. The software will need to be installed on the myCommunity server. The myCommunity server should reside outside the corporate firewall. The software that runs on the myCommunity server only needs to be installed if you are using the myCommunity Mobile app. Please note that all the software can be installed on a single machine only if it is a test server.



NOTE:

An SSL certificate is required, and the IIS Default Web Site must be configured to have https binding enabled.

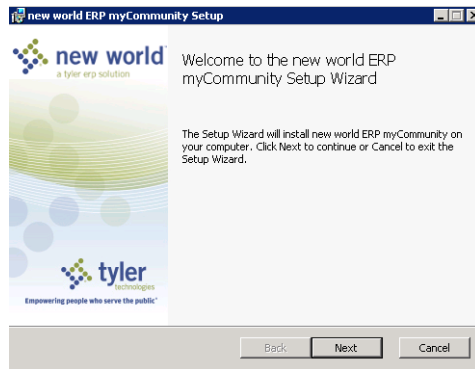


NOTE:

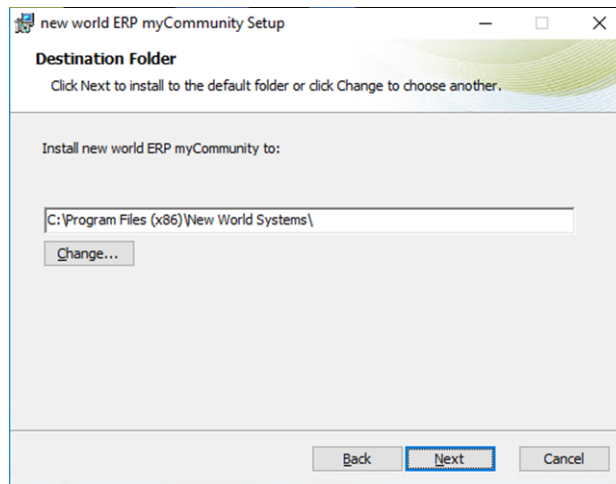
The server/firewall needs to be configured to work with Apple Push Notification.

- 1 Copy the **CD_myCommunity_<Version>** folder included with the New World ERP release to the server.

- 2 Double-click the **setup.exe** file. You will see the following screen:

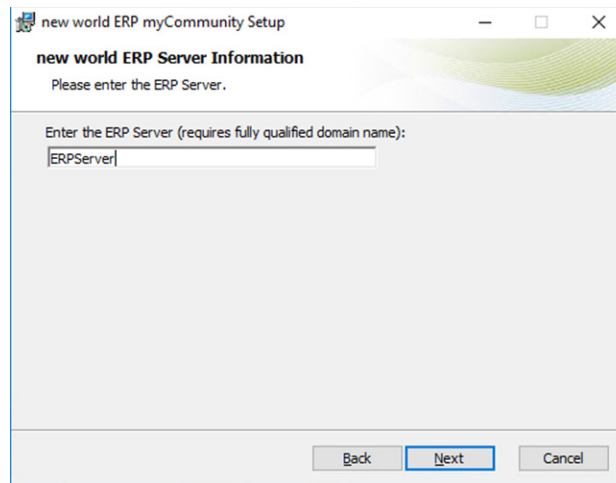


- 3 Click **Next**. The Destination Folder dialog will open:

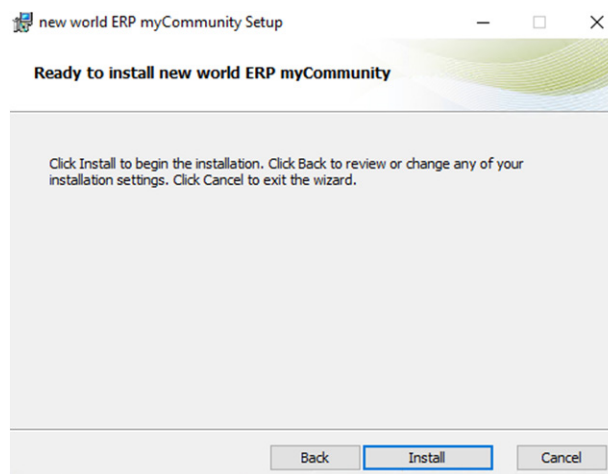


- 4 If you do not want to accept the default location, click the **Change** button to select another location.

- 5 Select only the **myCommunity Server** feature and click **Next**. The New World ERP Server Information dialog will open:

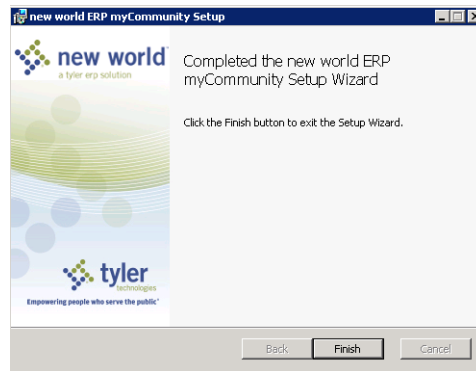


- 6 Enter the **ERP Server** and click **Next**. The dialog to begin the installation will open:



- 7 Click **Install** to begin the installation.

- 8 Once the installation is complete, click the **Finish** button:



NOTE:

See Appendix B for information on the product registration process following installation.

For Customers with eSuite or Decision Support

If you use eSuite or Decision Support, please be sure to upgrade to the current software of those releases after you have applied the post-installation steps in the next section that are applicable to your location.

Post-Installation Setup

New World ERP Module Installer

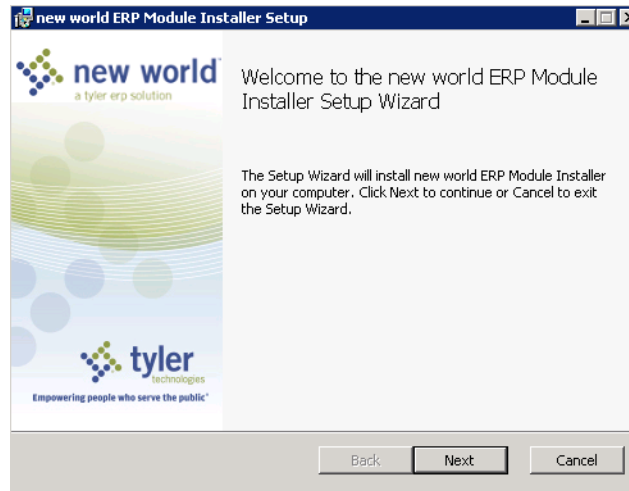
NOTE:

Only customers who license Dynamic Reporting need to install this.

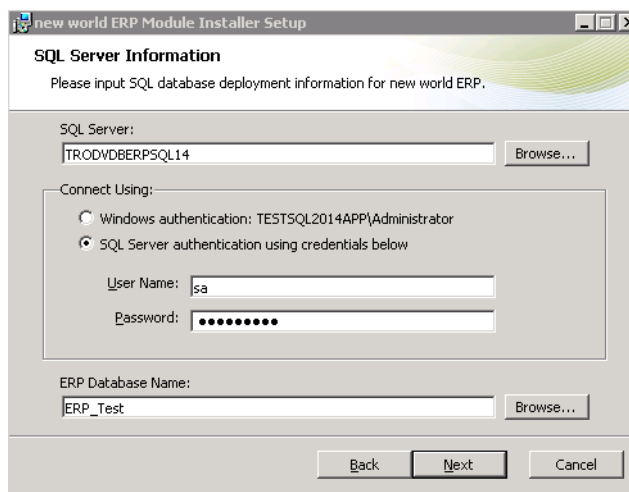
You will see the following sequence of dialogs if you are installing New World ERP Module Installer after you have installed the New World ERP release. **Please review all steps before beginning the installation.**

- 1 Locate the New World ERP Module installer under the **LOGOSModule-<xxx>** folder with the rest of the installers. New World ERP must be installed on the machine before you run this installer.

- 2 Double-click the *setup.exe* file to start the installer. The first dialog introduces you to the Setup Wizard:

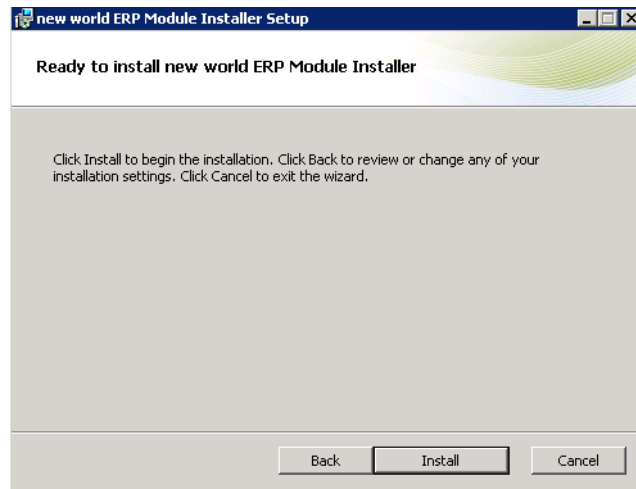


- 3 Click **Next**. The SQL Server Information dialog displays:

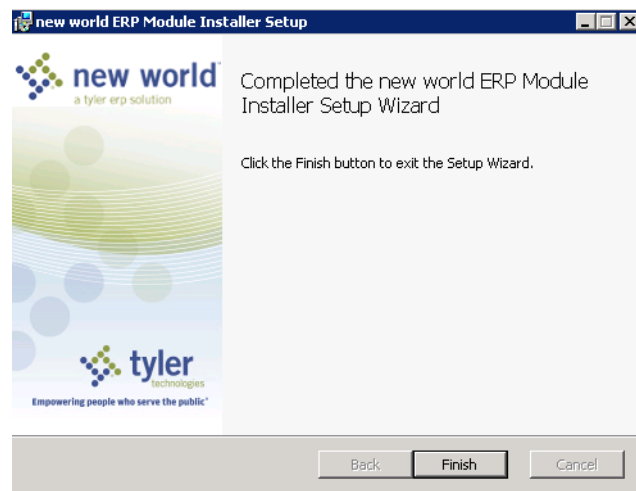


- 4 Fill in the SQL database deployment information:
 - a In the *SQL Server* field, type the name of the server where your SQL database resides, or use the Browse button to find and select the name.
 - b Select the following radio button: *SQL Server authentication using credentials below*.
 - c Type the *User Name* and *Password* of the user who has administrator rights to the ERP database.
 - d In the *ERP Database Name* field, type or browse for the name of the database that you are updating.

- 5 Click **Next**. The dialog to start the installation of the New World ERP Module Installer displays:



- 6 Click **Install**. After all of the files have been installed, the following dialog displays:



- 7 Click **Finish** to exit the Setup Wizard.

Report Writer

If you license the Report Writer, it is included with the rest of the software in a folder named, **Report Writer_<VersionNumber>**. Run the *setup.exe* and click the **Next** button on the dialogs to install.

Managed Internet Update (MIU)

New in the 2017.1 release was the Managed Internet Update (MIU) program, an internet-driven fix delivery program. It is the sole method of fix application. At this point in the update process, we strongly recommend that you run the available patches in the MIU.

For more information on the program and how to apply fixes, please see the *MIU Administrator's Guide* in the Managed Internet Update folder of the software download zip package.

NOTE:

If this is a test environment, please note which patches you are installing, so you can replicate the patches in your live environment.

Changing the Color of the ERP Header

A file named *Custom.css*, is located in the LOGOS website directory, whose default install location is *C:\Program Files (x86)\New World Systems\Logos.Net\Logos\Styles*.

This file contains commented code that can be uncommented to change the color of the header in New World ERP so that you can easily differentiate servers when testing New World ERP. To uncomment the code and have it take effect, you need only remove the */* */* that surrounds the *tag .phbackground* and save the file. The change will take effect immediately. See the illustration below:



```
/*  
  
    .phbackground  
    {  
        background-image: none !important;  
        background-color: rgb(214, 71, 22) !important;  
    }  
  
*/
```

You can also change the color of the header by changing the RGB value of the background-color tag.

To choose whatever color you want, go to the following website:

<http://www.colorpicker.com/>

NOTE:

The installer now persists this config file.

Appendix A: Downloading the Update

After creating a case for software access, you will receive an email like the following:

Tyler Technologies uses an electronic delivery system to make software available for download to your servers. The 2018.1 New World ERP Release is available via one of the links below. Please click on the link to access the files and download the software to your server:

- Download your software (Primary - East Coast) at: [https://edelivery.tylertech.com/\[customer number\]](https://edelivery.tylertech.com/[customer number])
- Download your software (Secondary - Midwest) at: [https://edelivery2.tylertech.com/\[customer number\]](https://edelivery2.tylertech.com/[customer number])

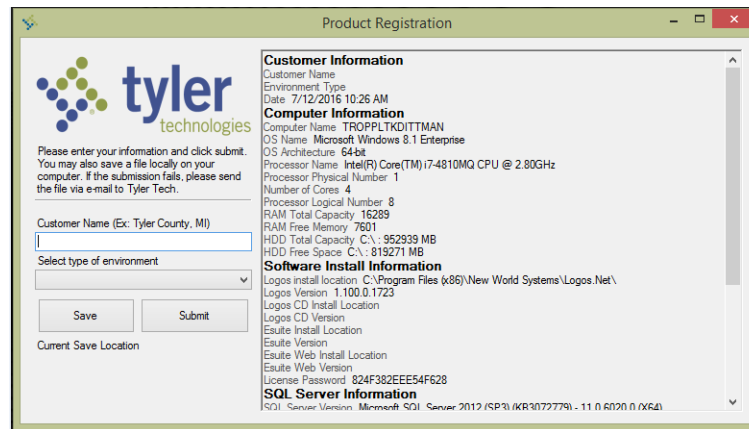
You will be prompted for your credentials; please use the following information:

Username: **[customer number]**

Password: **[customer number]**

Appendix B: Product Registration

When the installation completes, you will be prompted to register the product:



The Product Registration window displays the Tyler Technologies logo and instructions. It contains two main sections: Customer Information and Computer Information. The Customer Information section has a text box for Customer Name (with an example 'Tyler County, MI'), a dropdown for Select type of environment, and Save and Submit buttons. The Computer Information section lists system details like OS Name, Processor Name, and RAM. The Software Install Information section shows installation paths and versions. The SQL Server Information section shows the SQL Server version.

Customer Information
Customer Name
Environment Type
Date: 7/12/2016 10:26 AM

Computer Information
Computer Name: TROPPLTKDITTMAN
OS Name: Microsoft Windows 8.1 Enterprise
OS Architecture: 64-bit
Processor Name: Intel(R) Core(TM) i7-4810MQ CPU @ 2.80GHz
Processor Physical Number: 1
Number of Cores: 4
Processor Logical Number: 8
RAM Total Capacity: 16289
RAM Free Memory: 7601
HDD Total Capacity: C:\: 952939 MB
HDD Free Space: C:\: 819271 MB

Software Install Information
Logos install location: C:\Program Files (x86)\New World Systems\Logos.Net\
Logos Version: 1.100.0.1723
Logos CD Install Location
Logos CD Version
Esuite Install Location
Esuite Version
Esuite Web Install Location
Esuite Web Version
License Password: 824F382EEE54F628

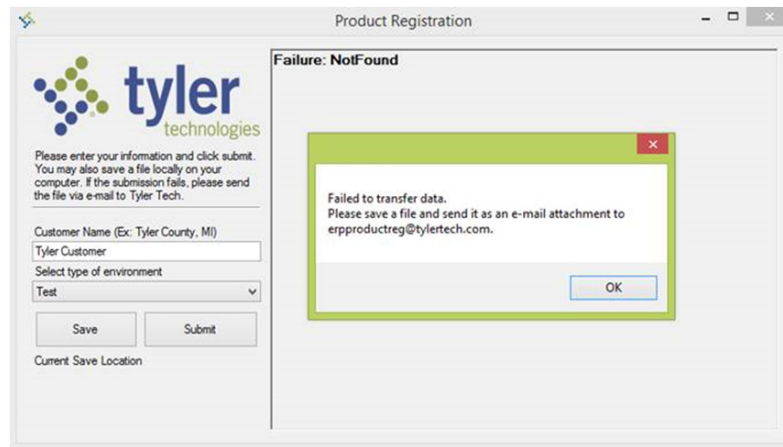
SQL Server Information
SQL Server Version: Microsoft SQL Server 2012 (SP3) (KB9307779) - 11.0.6020.0 (X64)

- 1 Type your *Customer Name*, typically the city and state or county and state.
- 2 Select the type of environment--**Test**, **Live** or **Other**--where the software has been installed.
- 3 If you have an internet connection, click **Submit**, and your registration information will be sent to Tyler Technologies. A successful submission will display as follows:

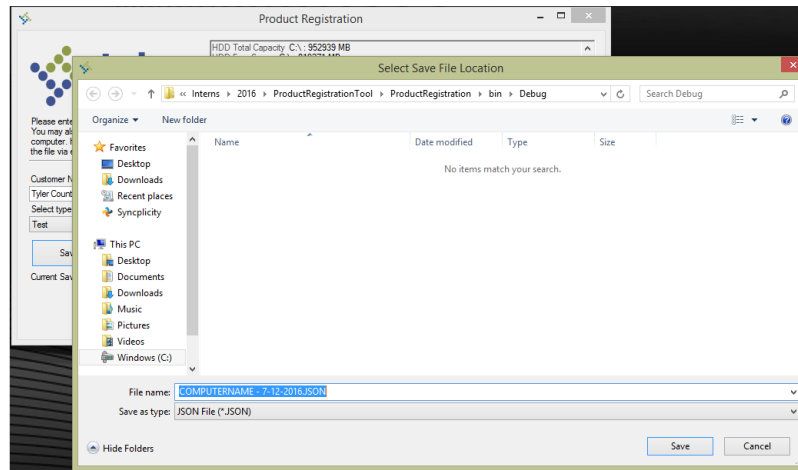


The Product Registration window shows a success message: 'Success: OK'. A small dialog box is overlaid on top of the window, displaying 'Data successfully submitted.' with an OK button.

- 4 If you do not have an internet connection and click **Submit**, an error will display, instructing you to save the file and send it as an attachment to erpproductreg@tylertech.com:



- 5 Click **OK**.
- 6 If you do not have an internet connection, click **Save**. The Select Save File Location dialog will display:



- 7 Select the location where you want to save the registration information to be submitted.
- 8 Click **Save**.
- 9 Send the saved file as an email attachment to erpproductreg@tylertech.com.

