

Tyler Identity 2018.1 Installation Guide

New World ERP – Foundation



© 2018 Tyler Technologies, Inc.

Data used to illustrate the reports and screens may include names of individuals, companies, brands, and products. All of these names are fictitious; any similarities to actual names are entirely coincidental. Further, any illustrations of report formats or screen images are examples only, and reflect how a typical customer would install and use the product.



Contents

Choosing Your Tyler Identity Server	1
Prerequisites	1
Install Instructions	3
Appendix A: Running the Migration Utility for Tyler Identity.....	9
Appendix B: Running the myInspections Configuration Utility	11
Appendix C: Synching Test Users to Live Tyler Identity Users.....	13
Appendix D: Testing by Impersonating Users in a Test Environment	15

CHOOSING YOUR TYLER IDENTITY SERVER

Tyler Identity has built-in install flexibility. There will be a Tyler Identity instance for each instance (test/train/live) of New World ERP you have. If your entity licenses multiple Tyler products, Identity is the product that will tie their logins together. In these situations, we recommend that you install Tyler Identity on a server other than the New World ERP Application Server. Installing Identity on the New World ERP Application Server can limit options in the future, although Identity can be moved later if desired.

Options:

1. Install Identity with multiple instances on a “Tyler” server that houses products that interface to several Tyler products. **Note:** Please refer to the [ERP Installation Guide](#) for help with the Internet Information Services Roles and Features required on this machine. The Application Server and Web Server roles should be set up in the same way as the recommendations for an ERP Application Server.
2. If the ERP App Server is on Server 2008 (detailed in prerequisites below), install Tyler Identity on any other web server that is inside of the firewall. **Note:** Please refer to the [ERP Installation Guide](#) for help with the Internet Information Services Roles and Features required on this machine. The Application Server and Web Server roles should be set up in the same way as the recommendations for an ERP Application Server.
3. Install an instance of Tyler Identity on each of your Application Servers for ERP.

PREREQUISITES

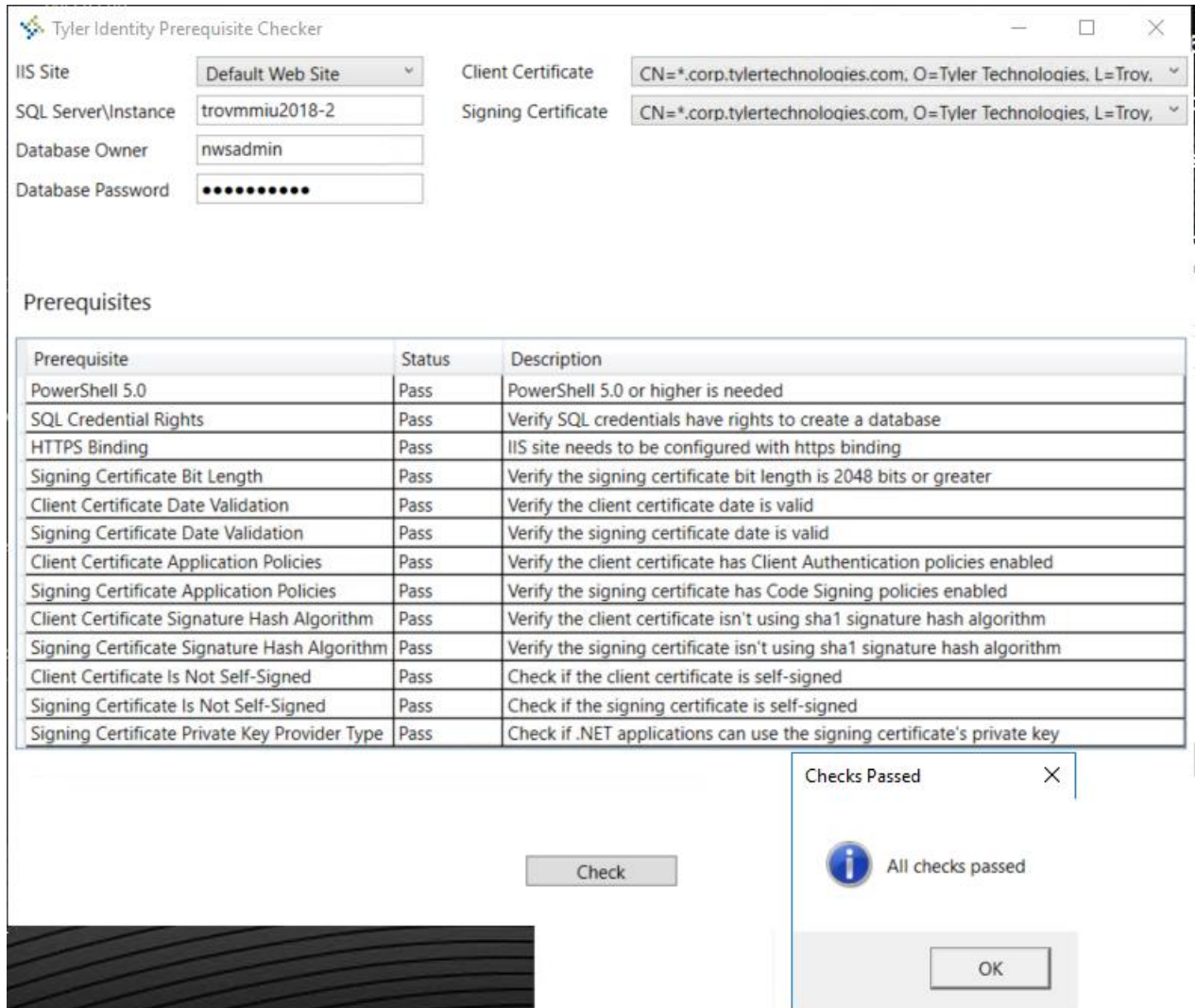
Tyler Identity has some defined prerequisites. They are listed below, and we have made a prerequisite checker app that will help determine whether you are ready:

- SSL certificate bound in IIS to the Default Website on port 443 that is 2048-bit length or longer. Various vendors exist that distribute SSL certificates.
- Self-signed certificates are not supported.
- Sha-1 certificate algorithms are not supported. An Sha-2 certificate is required.
- PowerShell 5.0 needs to be installed on the Tyler Identity machine. Because of this, servers running the Windows Server 2008 OS cannot be used to install Tyler Identity. **The Powershell execution policy needs to be set to RemoteSigned or Unrestricted for the Tyler Identity installation to complete. More information may be found here:** <https://www.mssqltips.com/sqlservertip/2702/setting-the-powershell-execution-policy/>
- Run the Tyler ID Pre-Req Checker Tool after binding your certificate to the server.

To launch the pre-requisite checker app, please locate the TylerIdentityPrereq.exe file in the TylerIdentity\TylerIdentityPrereqChecker folder from the 2018.1 software download, and run it on the server where you will be installing Tyler Identity. Any items that show up in red after the tool is run are items that need to be addressed before Tyler Identity is installed. A warning will appear if your SSL cert is set to expire in less than a year as a courtesy reminder.

Tyler Identity may be installed to any IIS Site, but we recommend the Default Web Site on the server to which it will be installed. The site you choose needs to have an SSL certificate bound to it on Port 443 within IIS. If that certificate does not meet the requirements detailed above, the tool should report it to you. A *Client Certificate* and *Signing Certificate* field will default to the certificate that is bound to the website chosen in the *IIS Site* field. Those can be overridden by using the dropdown menus.

Enter your SQL Server name, SQL User and password to test SQL connectivity, and click the **Check** button to test Tyler Identity prerequisites. A log (TylerIdentityPrereq.log) is created in the TylerIdentityPrereqChecker folder with more details from the pre-requisite check:



Tyler Identity Prerequisite Checker

IIS Site: Client Certificate:

SQL Server\Instance: Signing Certificate:

Database Owner:

Database Password:

Prerequisites

Prerequisite	Status	Description
PowerShell 5.0	Pass	PowerShell 5.0 or higher is needed
SQL Credential Rights	Pass	Verify SQL credentials have rights to create a database
HTTPS Binding	Pass	IIS site needs to be configured with https binding
Signing Certificate Bit Length	Pass	Verify the signing certificate bit length is 2048 bits or greater
Client Certificate Date Validation	Pass	Verify the client certificate date is valid
Signing Certificate Date Validation	Pass	Verify the signing certificate date is valid
Client Certificate Application Policies	Pass	Verify the client certificate has Client Authentication policies enabled
Signing Certificate Application Policies	Pass	Verify the signing certificate has Code Signing policies enabled
Client Certificate Signature Hash Algorithm	Pass	Verify the client certificate isn't using sha1 signature hash algorithm
Signing Certificate Signature Hash Algorithm	Pass	Verify the signing certificate isn't using sha1 signature hash algorithm
Client Certificate Is Not Self-Signed	Pass	Check if the client certificate is self-signed
Signing Certificate Is Not Self-Signed	Pass	Check if the signing certificate is self-signed
Signing Certificate Private Key Provider Type	Pass	Check if .NET applications can use the signing certificate's private key

Checks Passed

 All checks passed

INSTALL INSTRUCTIONS

1. On the server where you are installing Tyler ID, open *ERPims.exe* from the Tyler ID install folder by choosing **Run as administrator** with a right click. This installer ships in the 2018.1 download in the TylerIdentity\TID.2017.5_NW folder. ***Please note that, at times, we have seen certain Virus Scanners pick this file up as suspicious. If the file will not open for you, please check whether your Virus Scanner is blocking it from running.***
2. Choose what environment to install at the top level (Test, Train, Prod, etc.) and enter a customer number. While this number does not matter at this time, it will be important at upgrade time. Please choose a number that you can remember. To install to another environment, click the + sign and add a new environment type. Leave all other options selected:

Main - Installation Management System

Customer/Environment Information

Customer OCN: 6200 +

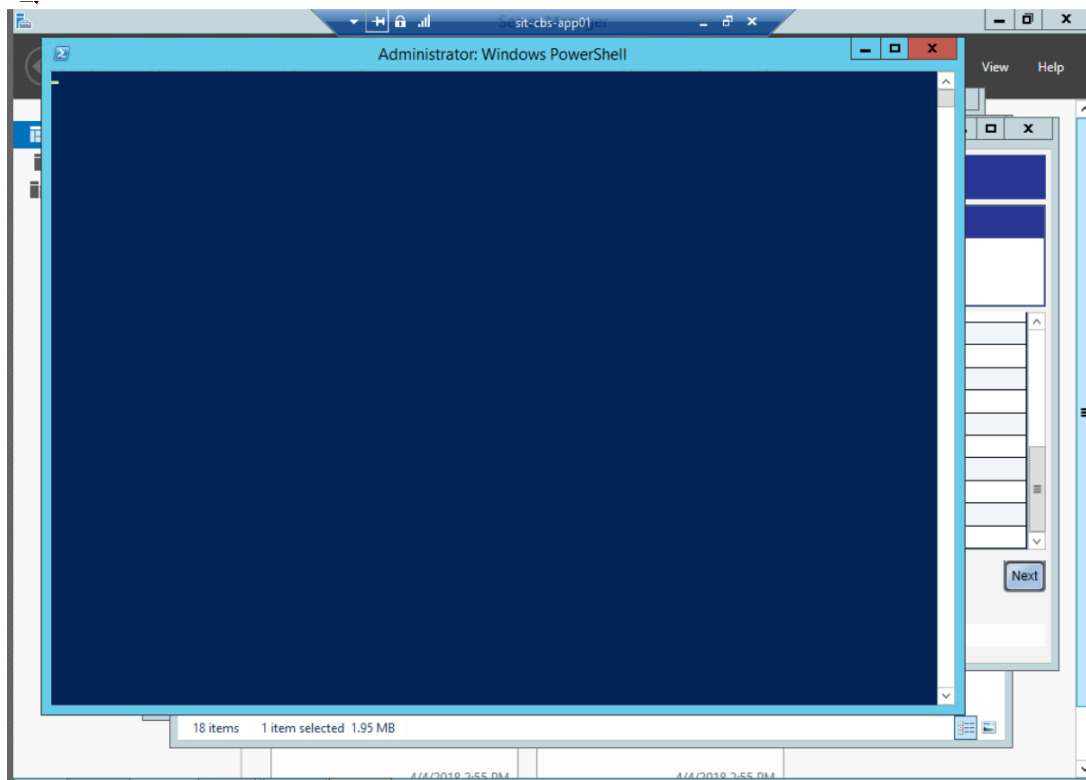
Environment: Test +

Select the stages which you want to run:

Description	Status
☒ Tyler Identity DB	
☒ Tyler Identity Operational Services	
☒ Tyler Identity Token Server	
☒ Tyler Identity Configuration	
☒ Tyler Identity Configuration Service	
☒ Tyler Identity User Administration	
☒ Tyler Identity User Administration Service	
☒ Tyler Identity User Provisioning	
☒ Tyler Identity User Provisioning Service	
☒ Tyler Omnibar UI	

Next

3. Click **Next** twice. Please note that the user logged in and running the install should have admin rights to SQL Server on the database server. This installer will create Tyler Identity databases in SQL Server.
4. Powershell prompts may flicker and may ask you for your SSL certificate of choice from an enumerated list. You may see multiple Powershell popups. You may also see an enumerated list where you will need to choose your applicable SSL certificate.:



5. The following dialog will appear:

Define Default Variables [X]

The following default value variables were not found. Please provide values for the default value variables now.

Name	Value
TID DB INSTANCE	
TID DB NAME	
TID DB SQL USER	
TID SQL USER PASSWORD	
ENTERPRISE FQDN	
USERDNSDOMAIN	
SMTP HOST	
SMTP PORT	
SMTP USE SSL	
SMTP FROM ADDRESS	
NWERP DB INSTANCE	
NWERP DB NAME	
NWERP DB SQL USER	
NWERP SQL USER PASSWORD	
NWERP SITE URL	

Accept Cancel

Enter the DB server and TylerID DB Name (suggestion = tid_ENVIRONMENTNAME) in *TID DB INSTANCE* and *TID DB NAME* respectively.

Enter a sql user (**cannot be the sa account**) in the *TID DB SQL User* and *TID DB SQL User Password* fields.

Enter the connection information to the NWERP DB also.

In the *NWERP SITE URL* field, enter <https://SSLCERTNAME/logos>, whatever is used to get to New World ERP on the App Server via SSL.

The *ENTERPRISE FQDN* is the SSL Cert Name of the TylerID server.

SMTP USE SSL is true or false.

Note: The sa user cannot be used for the TID DB SQL User in this installer. We recommend using a tiduser (the install will create this user with the proper rights in SQL with whatever password you choose for it). The TID application will utilize this user to access the TID database.

Define Default Variables



The following default value variables were not found. Please provide values for the default value variables now.

Name	Value
TID DB INSTANCE	trovmmiuappsbx
TID DB NAME	tid_centraltest
TID DB SQL USER	tiduser
TID SQL USER PASSWORD	TidUs3r
ENTERPRISE FQDN	trovmmiu2018t.corp.tylertechnologies.com
USERDNSDOMAIN	trovmmiu2018t
SMTP HOST	nwtestmailch.nwtest.com
SMTP PORT	25
SMTP USE SSL	false
SMTP FROM ADDRESS	tylerid@tylertech.com
NWERP DB INSTANCE	trovmmiuappsbx
NWERP DB NAME	MyNWERPDB
NWERP DB SQL USER	nwsadmin
NWERP SQL USER PASSWORD	nwsadminpassword
NWERP SITE URL	https://trovmmiuappsbx.corp.tylertechnologies.com/logos

Accept

Cancel

- Click **Accept** when done configuring.
- If using Active Directory to integrate with New World ERP logins, please follow step 7. If not, skip to step 8.**

To configure Tyler ID to integrate with Active Directory, expand the Tyler Identity Token Server bar and change the *Authentication Type* to **AD** from TID. This can also be changed after the install by going into the AppSettings.config file in the C:\inetpub\tylerroot\TylerID\IDPTokenServerENVIRONMENTNAMECore folder on the Tyler Identity server where *ENVIRONMENTNAME* should be replaced with the environment name you chose in step 2:

Set Variables - Installation Management System

Customer/Environment Information

Customer OCN: 213412431243
Environment: MyEnv

Provide/check the value for the variables in the following components:

MyEnv

- ▼ Tyler Identity NWERP DB Update
- ▼ Tyler Identity NWERP Operational Services
- ▼ Tyler Identity NWERP Token Server
- ▼ Tyler Identity Operational Services
- ▲ Tyler Identity Token Server

Operational Services URL	https://trovmmiu2018t.corp.tylertechnologies.com/IDPOperationalServicesMyEnvCore/
IDP Token Server URL	https://trovmmiu2018t.corp.tylertechnologies.com/IDPTokenServerMyEnvCore
Cluster URL	https://trovmmiu2018t.corp.tylertechnologies.com/
AD Domain	trovmmiu2018t
TylerIdentity:UserProvisioning/	https://trovmmiu2018t.corp.tylertechnologies.com/
TylerIdentity:UserProvisioning/	https://trovmmiu2018t.corp.tylertechnologies.com/IDPUserProvisioningMyEnvCore
Authentication type	TID
TylerIdentity:EnablePostSignO	true
SMTP Host	nwtestmailch.nwtest.com
SMTP Port	25
SMTP SSL (Enter true or false)	false
Email From Address	tylerid@tylertech.com
URL	IDPTokenServerMyEnvCore

Back Next

8. Click **Next**:

Installation process - Installation Management System

Customer/Environment Information

Customer OCN: 6200
Environment: Test

Click Install to start the installation of the following products:

Product	Component	Environment	Target Version	Server	Execute
Tyler Identity	Tyler Identity DB	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Operational Services	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Token Server	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Configuration	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Configuration Service	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity User Administration	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity User Administration Service	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity User Provisioning	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity User Provisioning Service	Test	2017.5	localhost	✓
Tyler Identity	Tyler Omnibar UI	Test	2017.5	localhost	✓
Tyler Identity	Tyler Omnibar Service	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Account Linking	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity Account Linking Service	Test	2017.5	localhost	✓
Tyler Identity	Tyler Identity NWERP DB	Test	2017.5	localhost	✓

Back Install

9. Click **Install**.

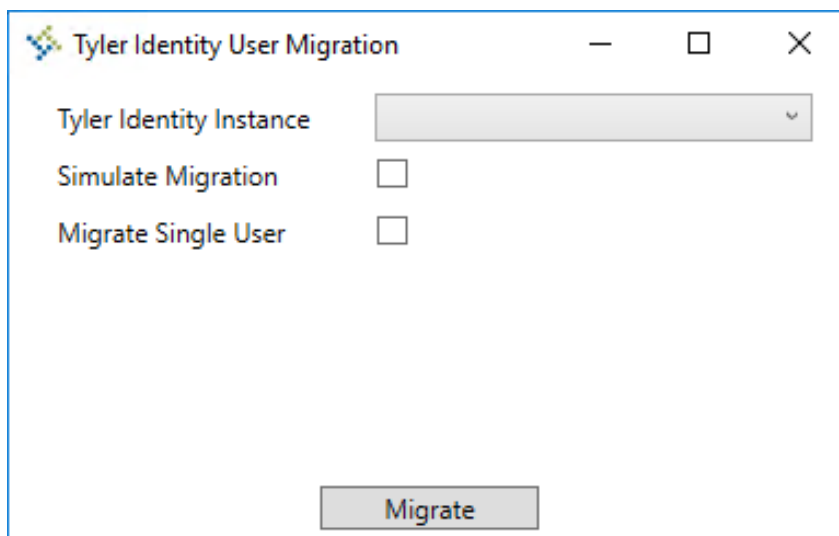
10. The installer will process and show you its progress. A PowerShell prompt may display, asking you what cert you would like to use. This prompt may display for multiple installable pieces. Choose the cert and click **Enter**.
11. Close the installer when it completes.
12. Move on to installing ERP.
13. After installing New World ERP (or concurrently to running the New World ERP install), run the User Migration utility for Tyler ID, detailed in Appendix A.

Note: If you run the myInspections App for iPad-based inspections, you need to follow the instructions in Appendix B.

Appendix A: Running the Migration Utility for Tyler Identity

To move the users from the New World security store (the traditional SecurityUser table) to Tyler Identity, a migration needs to occur. Going forward, users will continue to be created in New World ERP as the starting point, and the password will be managed in Tyler Identity.

We have written a utility for the user migration to Tyler Identity. On the server where Tyler Identity was installed, please open the *TylerIdentityUserMigration.exe* file from the TylerIdentity\TylerIdentityUserMigration folder by right clicking and choosing **Run as Administrator**. Migrations may be done multiple times to move users from New World ERP to Tyler Identity in the event of a failed migration. After the migration tool runs, you will receive a report of successful and failed migrations. Here is a screenshot of the migration tool:



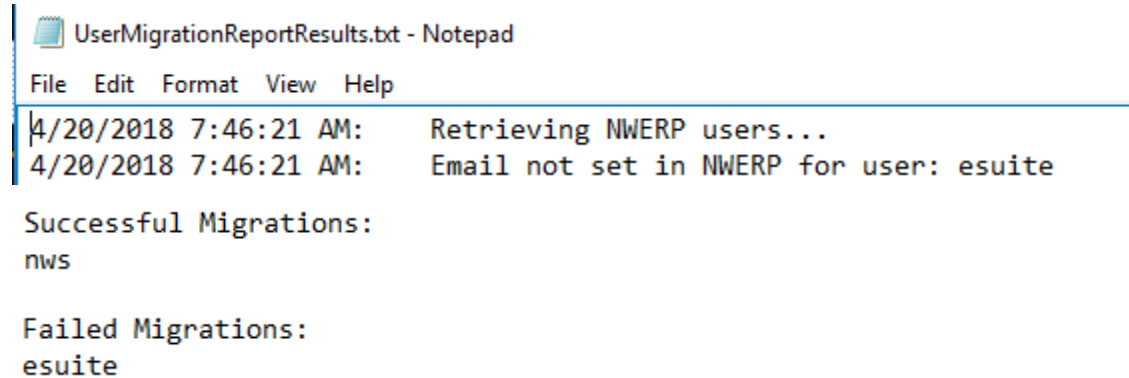
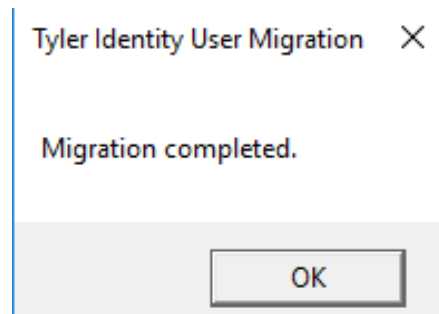
The *Tyler Identity Instance* dropdown will include all Tyler Identity Instances that can be determined on the machine. The tool will read the configuration files in the instance chosen to determine which Tyler Identity and New World database should be used for the user migration.

Using the *Simulate Migration* checkbox will simulate the migration and create a report of successful or failed migrations. Running the tool with *Simulate Migration* unchecked will run the actual migration and produce the same report (screenshots below).

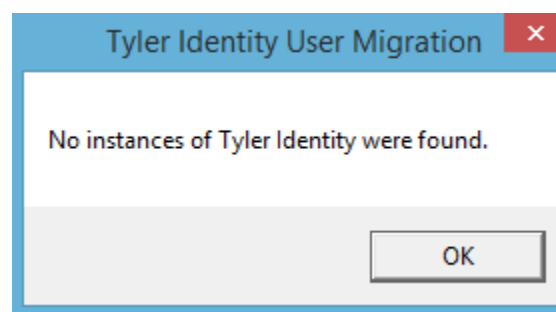
Using the *Migrate Single User* checkbox will migrate only one user from New World ERP to Tyler Identity for that instance:

Note: The migration tool would read Active Directory (in AD setups) as the user that is logged in and running the tool. If you are an AD customer, please log into the server as a domain user and not a local user when running this step.

Note: .Net Framework cannot read Active Directory if users exist in Organizational Units that have slashes (/) in their names. Slashes are allowed in LDAP but not in .Net Framework calls to Active Directory. Please ensure Organizational Units in Active Directory do not have slashes in their names. More information on this .Net Framework defect can be found online.



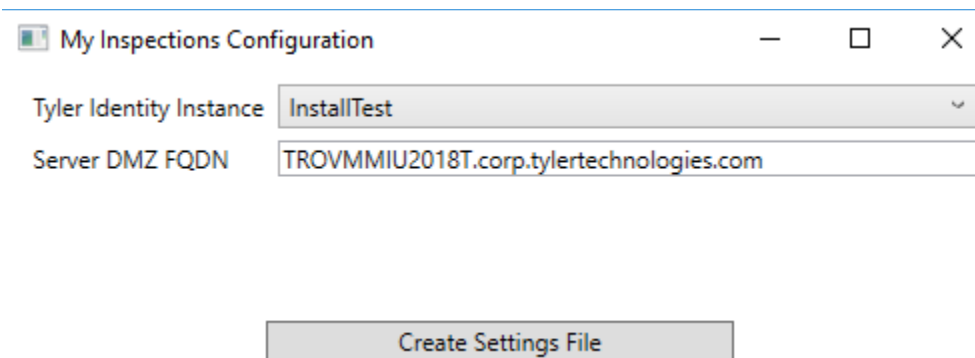
Note: If this tool is run on a machine without Tyler Identity installed, you will see the message below:



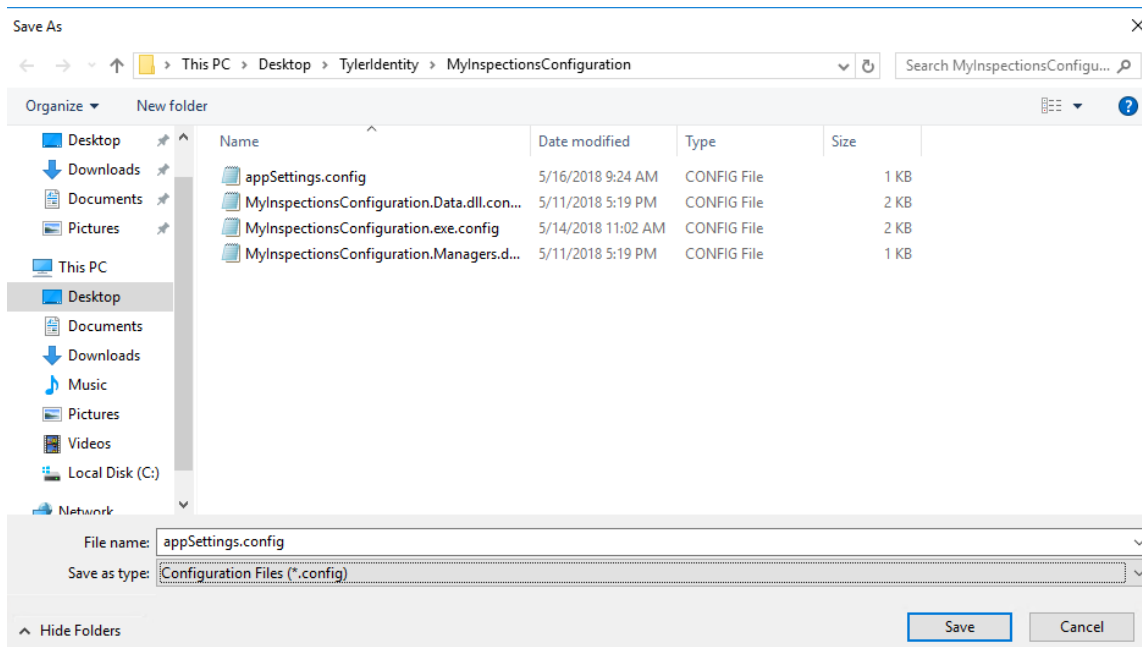
Appendix B: Running the myInspections Configuration Utility

If you are using the myCommunity Server functionality for the myInspections app, you will need to run the MyInspectionsConfiguration.exe program (right click and run as administrator) from the TylerIdentity\MyInspectionsConfiguration folder from the 2018.1 download on the Tyler Identity server.

Choose a Tyler Identity Instance and click *Create Settings File*. If the name of the SSL cert for Tyler Identity is different than the default of FQDN, you can change it to your cert name:



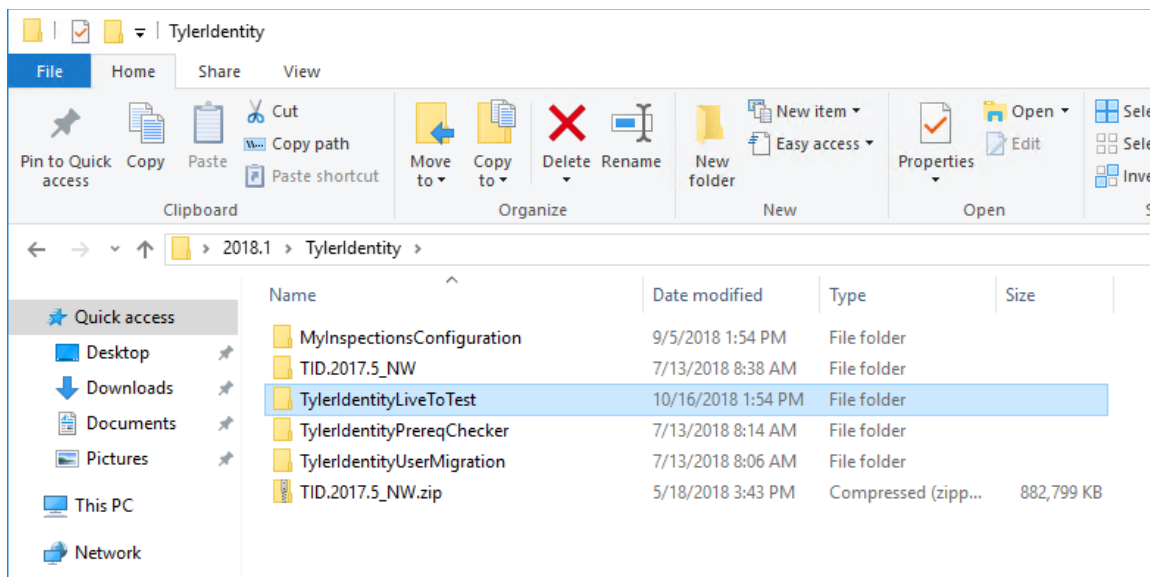
After clicking the button, you will be asked to save the appSettings.config file somewhere (it needs to be named appSettings.config). Save the file somewhere from where you will be able to copy it to the myInspections server:



Once the file is saved, please copy the appSettings.config file to the server where myInspections is installed and drop it into the {InstallLocation}\New World Systems\Logos.Net\CD\Web API\Inspections directory. Subsequent upgrades to myInspections will persist this file.

Appendix C: Synching Test Users to Live Tyler Identity Users

A utility has been created to allow a refresh of test New World ERP Tyler Identity users from the live Tyler Identity user store. This utility was built to ease the process of copying the live ERP database to test and synching the Tyler Identity users together in each database. Depending on your download date of version 2018.1, you may have a copy of the utility in the *TylerIdentity* folder of the install. This utility is called *TylerIdentityLiveToTest*:



This utility needs to be run on the server that is running your test instance of Tyler Identity. It will remove all your test users from the Tyler Identity database and replace them with copies of the live users. To run the utility, open the *TylerIdentityLiveToTest* folder, right-click on the *TylerIdentityLivetoTest.exe* program, and choose **Run as Administrator**. Use the **Build** button to build the SQL connection string to the live Tyler Identity database.

Note: The **Backup Database** option will back up the test Tyler Identity database to the default SQL Server backup location (as configured when you installed SQL Server).

Tyler Identity Live to Test

Test Tyler Identity Instance InstallTest

Live Tyler Identity Database Data Source=trovmmiu2018;Initial Ca Build

Backup Database ☒

Copy

Clicking the **Copy** button will open a dialog box explaining that TID users will be copied from the selected live instance to the selected test instance:

Tyler Identity Live to Test

? Found NWERP Instances

Live
https://trovmmiu2018.corp.tylertechnologies.com/logos

Test
https://trovmmiuappsbx/logos

Continue to Copy?

Yes No

Clicking **Yes** will continue the utility. When the utility completes, you will see this dialog:

Tyler Identity User Migration

Migration completed.

OK

In the folder the utility was launched from, two log files named **LiveToTestReportResults.txt** and **TylerIdentityLiveToTest.log** will be created.

Appendix D: Testing by Impersonating Users in a Test Environment

To impersonate users in the test environment (often done during testing of a patch or a new update), please see Appendix C of this document. We recommend copying users that you want to test as new users. These users will need a unique email address for testing. If user licensing is not available, inactivating accounts in test that will not use the test environment would free up the license and allow you to copy a user to test with.