

Tyler Content Manager (TCM) Migration 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

Migration steps	1
Running a clean index rebuild.....	7
Purging File Storage Documents.....	7
Appendix	10
New World ERP Database	10
Tyler Content Manager Database	10

Tyler Content Manager (TCM) Migration Guide

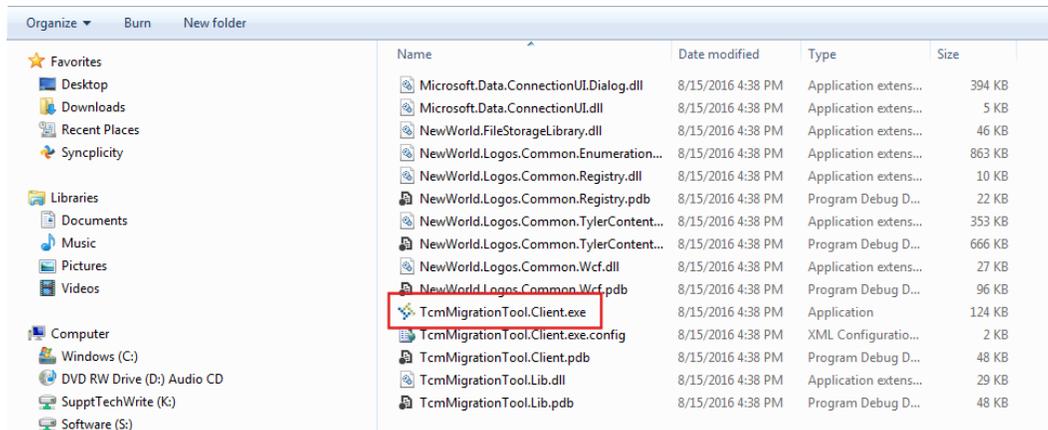
New World ERP – Foundation

This guide shows you how to use the TCM Migration Tool for migrating New World ERP documents from file storage to TCM. This tool is packaged alongside the installer but is not installed with the software.

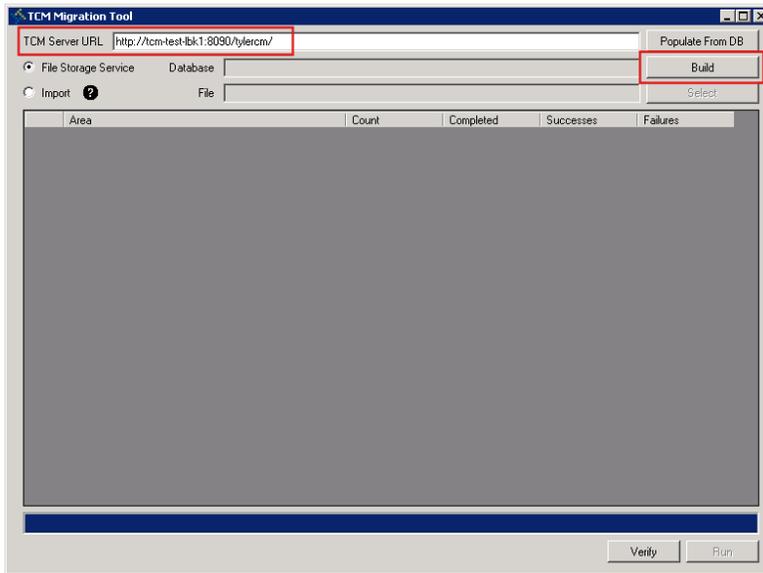
MIGRATION STEPS

In the following steps, the TCM server URL and application server will be selected, the New World ERP database will be selected for migration, a query will be run to review how many and what types of documents will be migrated, and the migration itself will be run.

1. Open the installer folder. This folder contains the migration tool:



2. Double-click the *TcmMigrationTool.Client.exe* file. The TCM Migration Tool dialog will open:

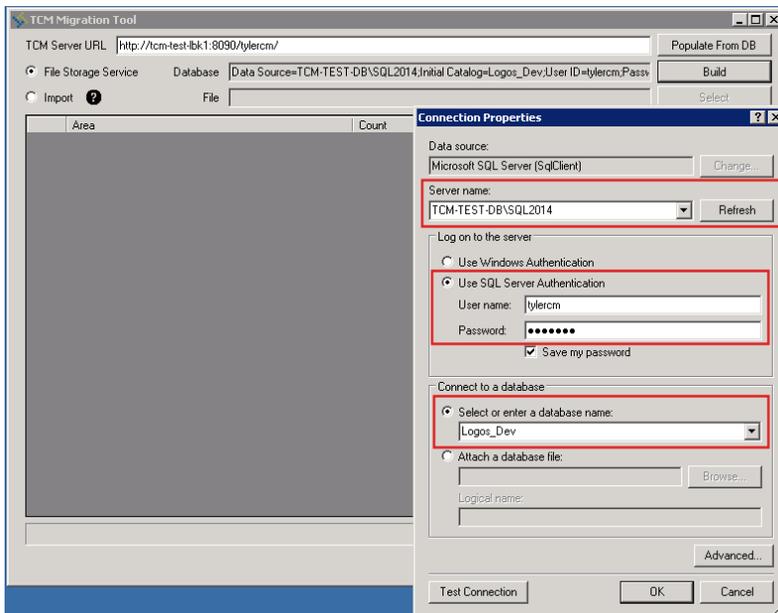


3. Fill in the *TCM Server URL*.

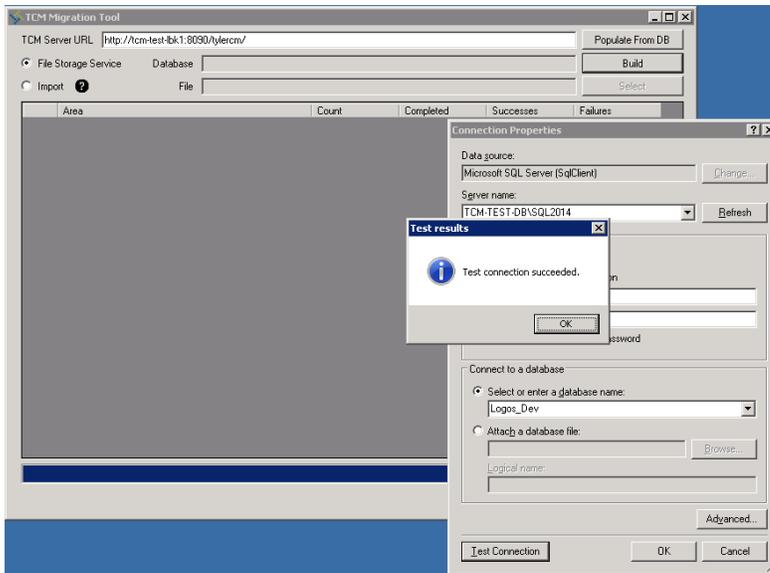
The **Populate from DB** button brings in the TCM server if the database already is configured to use TCM. Most of the time, TCM will be configured after the migration.

The **Import** radio button is not for New World ERP file storage conversions; it is for new or existing customers using third-party document management systems. If you need more information on this function, click the question mark icon to the right of the radio button label.

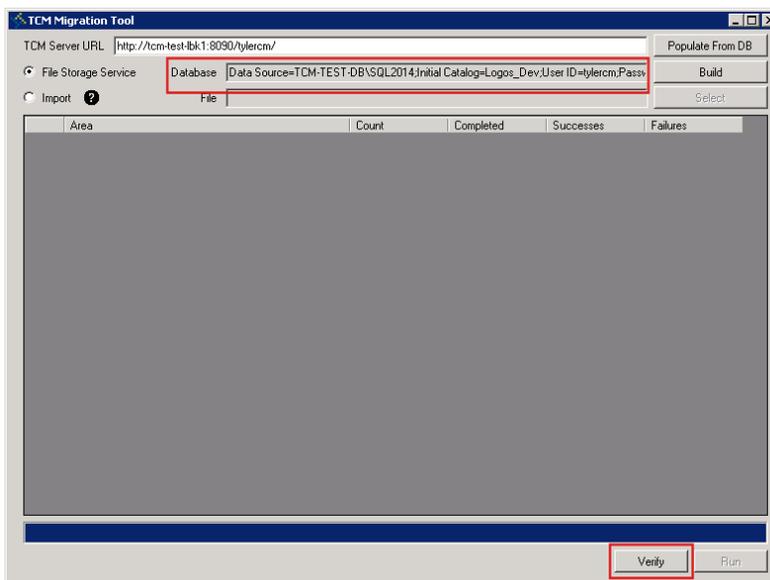
4. Click **Build**. The Connection Properties dialog will open:



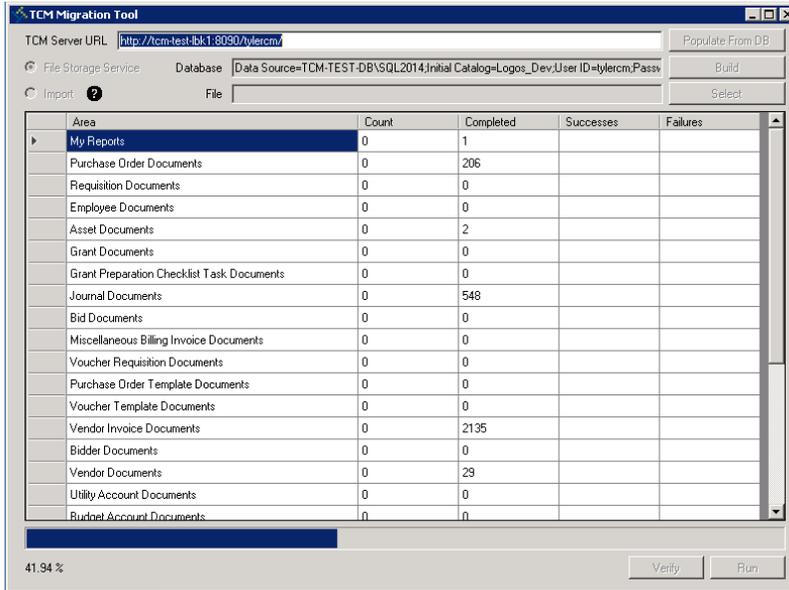
5. Fill in the New World ERP SQL *Server name*.
6. In the **Log on to the server** section, fill in the SQL Server Authentication *User name* and *Password*.
7. In the **Connect to a database** section, select the New World ERP database from which documents will be pulled.
8. Click **Test Connection**. This function will test the connection to the ERP database, which is not hosted on the application server. A pop-up will notify you of the results of the test connection:



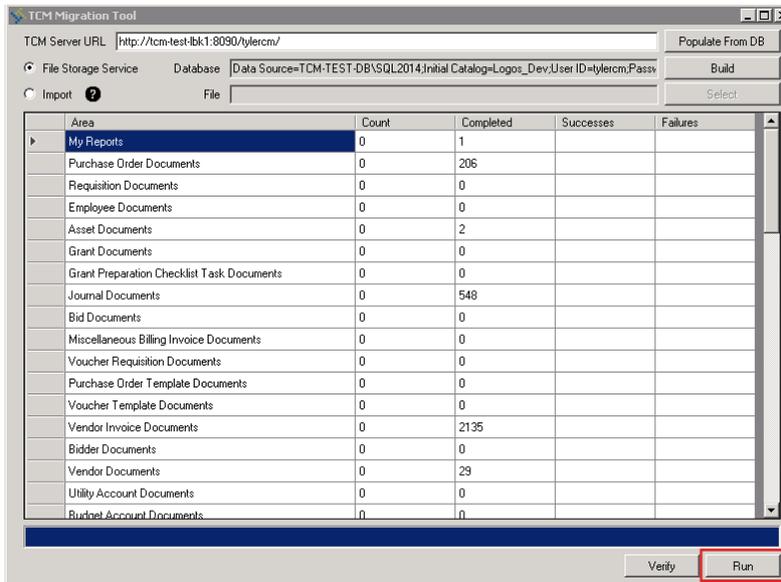
9. Click **OK** to close the pop-up.
10. On the Connection Properties dialog, click **OK**. The dialog will close, and the *Database* field will be filled in:



11. Before running the migration, click the **Verify** button to query the database and show how many documents will be converted per document type. The query results will include document types with zero documents. As the query runs, a progress bar will show the percentage completed and the time remaining:



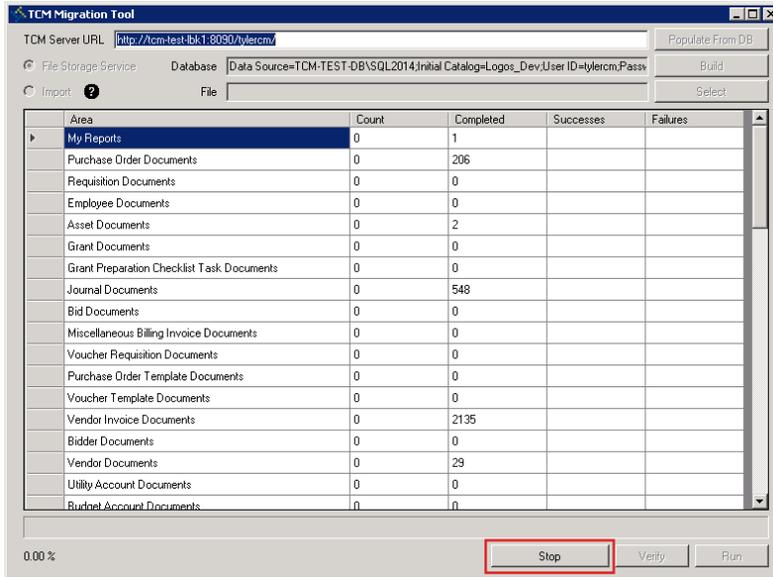
When the query finishes, the **Run** button will be enabled:



12. If you are satisfied with the results of the query and ready to run the actual migration, click the **Run** button.

The TCM Migration Tool will track all documents as they are migrated. You can find these documents in the New World ERP database selected in step 5 above. Use SQL Management Studio to log into the database using the same credentials entered in step 6 above.

During the migration, a **Stop** button will appear next to the **Verify** button:

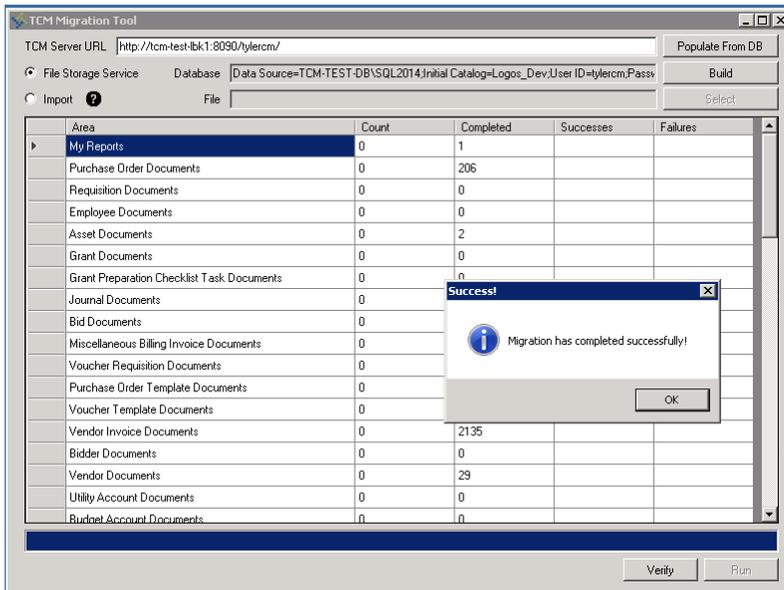


Click this button if you want to stop the migration and resume at a later time.

The estimated remaining time of the migration also will display at the bottom of the TCM Migration Tool dialog.

A pop-up will notify you when the full migration has completed:

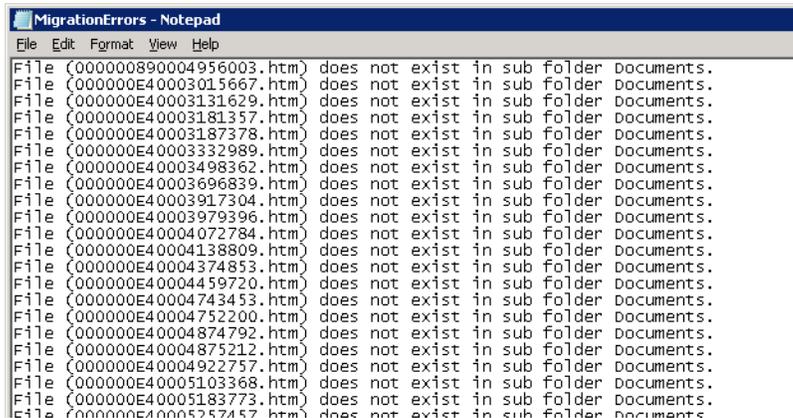
TCM and TylerForms Administrator's Guide



If errors occurred in the migration, a **Show Errors** button will display:



Click this button to view descriptions of the errors:



If errors have occurred, please save the error file and contact the New World ERP support center.

After completing these steps, you will need to run a clean index rebuild to make sure the search index reflects that all documents have been removed.

RUNNING A CLEAN INDEX REBUILD

The steps described below must be performed in the TCM client application.

To run a clean index rebuild, follow these steps:

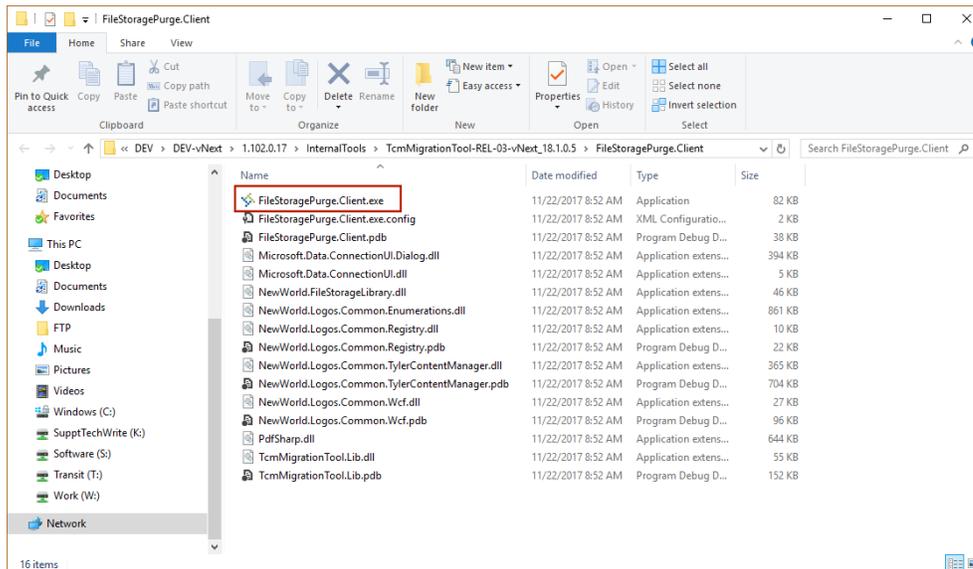
1. Navigate to Utilities > Advanced Support > Manage Indices.
2. Click **Rebuild All IDoc Types**.
3. Select the *Delete Existing Index Files* check box.

Following the migration and once TCM is turned on, make sure to revisit User Permissions, since TCM document permissions are different from File Storage permissions. (See “Managing User Permissions for Documents” in the *TCM and TylerForms Administrator’s Guide*.)

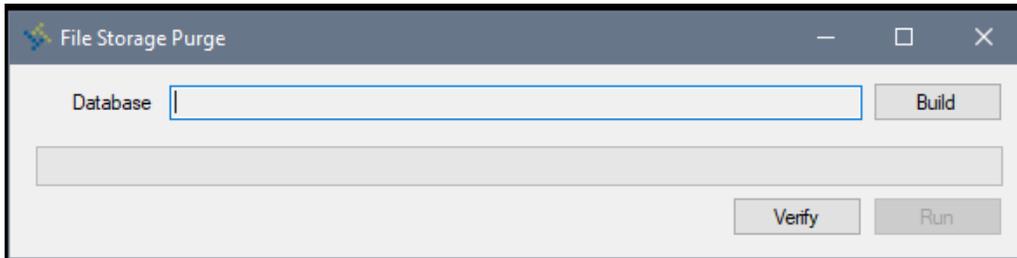
PURGING FILE STORAGE DOCUMENTS

After you have migrated your documents to TCM and have spent sufficient time determining that all of them have migrated properly and are functioning to your satisfaction, you have the option to run the following process to purge the documents from the file storage server, freeing up space.

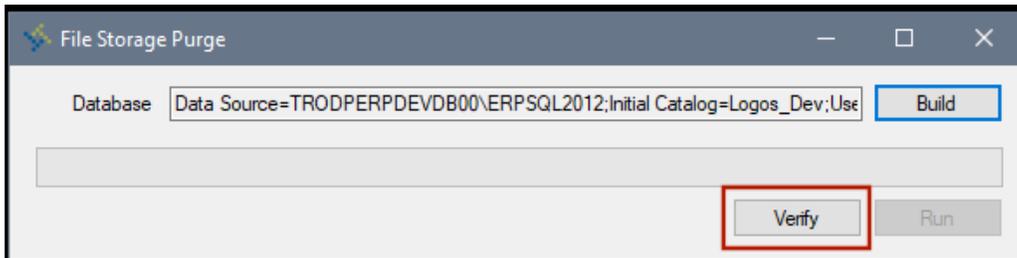
1. Open the installer folder. This folder contains the purge tool:



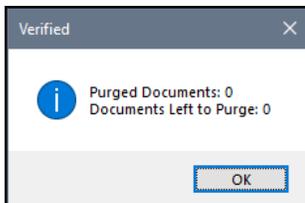
2. Double-click the *FileStoragePurge.Client.exe* file. The File Storage Purge dialog will open:



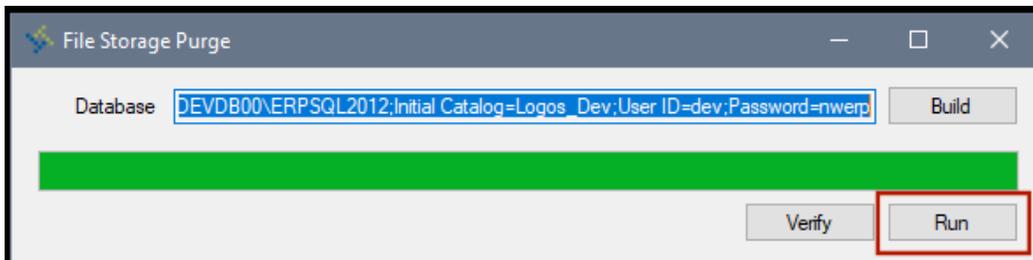
3. Fill in the *Database*:



4. Click **Verify** to query the database. As the query runs, a progress bar will show the percentage completed and the time remaining. At the end of the query process, a Verified popup will display, giving you a count of how many documents have been purged and how many are left to purge. If you have not previously run the purge process or stopped it in progress, the result of the query will show the number of documents purged as zero:

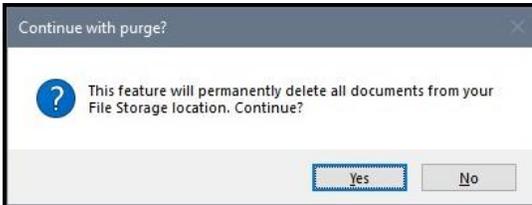


5. Click **OK** to close the popup.
6. After the query, the **Run** button will be enabled on the File Storage Purge dialog:



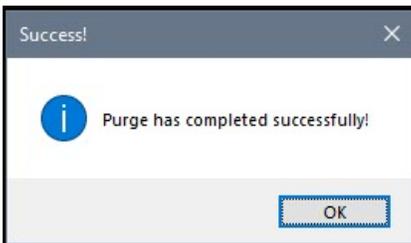
7. If you are satisfied with the results of the query and ready to run the actual purge, click the **Run** button.

A Continue with purge? dialog will display, stating that all documents will be deleted from your file storage location and asking whether you want to continue:



8. If you want to continue, click **Yes**. The purge process will begin. During this process, a **Stop** button will be available next to the **Verify** button. Click this button if you want to stop the purge and resume it later.

When the purge has completed, a popup will display:



Note: If errors have occurred, please save the error file and contact the New World ERP support center.

APPENDIX

Here are brief descriptions of the SQL tables used during the migration process:

NEW WORLD ERP DATABASE

The table "Suite.TcmDocumentMigration" stores which File Storage Service documents have been migrated and the date when each was migrated.

TYLER CONTENT MANAGER DATABASE

The table "dbo.Document" stores document header information, such as title, type, created/modified information, etc.

The table "dbo.DocumentData" stores all of the metadata for the documents.

The table "dbo.DocumentData2" stores the actual documents.