

new world ERP Server Migration Checklist

New World ERP – TMS



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OVERVIEW

NOTE: This document covers a complete system migration, including the Database, Application, and eSuite servers. If a portion of this document does not apply to your configuration, ignore it.

WARNING: Do not perform an in-place upgrade of Windows Server or SQL Server, as these result in multiple problems with missing roles, features, Windows Components, and other parts of the application functionality.

Phases:

- Document and Build environment(s)
 - Document current environment information
 - Build/configure new servers
 - Transfer/restore files and databases
 - Install application and any additional modules
 - Create and test SQL Server Maintenance Plans
 - Restore custom reports or files
 - Install SSL certificate(s)
- Test new servers (existing servers will still be online)
 - Main application
 - Customizations
 - Interfaces
 - eSuite (if present)
 - DSS (if present)
- Cut over to new servers (remove access to old servers)
 - Take current servers offline
 - Update data (differential)
 - Bring new servers online
 - Test/validate cutover

Note: Each implementation will contain unique elements determined by your specific needs. The information here represents best practices which cover the majority of installation configurations.

Not on minimum client system requirements:

- *Please refer to the new world ERP Installation or Update Guide for detailed requirements*
- **Operating System:** Windows 7, 8, 10
- **Web Browser:** Internet Explorer 9, 10, 11
- **.NET Framework 4.5.2**
- Website should be added to Compatibility Mode list, and to Trusted Sites

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DOCUMENT AND BUILD ENVIRONMENTS

I. Document current environments – for your reference in executing the migration

a. Networking settings

Domain Name / FQDN		
IP Address Range (optional)		
Subnet Mask		
DNS Servers		

b. User Credentials

AD Service Account	Username	Password
SQL Server admin account		
eSuite (Prod) local login		
License Password	Check the ERP Management Console, on the Licensing page	

c. Server Configurations – See Appendix B. **Copy and paste the table for each server in your system**

- List all servers and roles
- add lines if necessary
- Note the environment (Test, Train, Production, etc.)

d. eSuite server information (if licensed and installed)

FQDN	
IP address of Production App server	

e. Customizations: Record any custom files here

- SSRS Reports (*NOTE: You may not have any custom reports*)
 - Check the ERP Management Console for the SSRS custom folder name and the server on which the reports are installed
 - Check the reports on <http://sqlOrReportingServerName/reports> or <https://sqlOrReportingServerName/reports> and note any custom reports

Folder (Report Manager web page)	Report Name (exact file name)

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ii. Import/Export files

1. Log in to the New World ERP Application
2. Check each listing under Imports and Exports and note any custom files with file paths

Import Name	Path/Filename

Export Name	Path/Filename

II. Build New Environments

- a. Access/download current server requirements
 - i. Browse to <https://check.tylertech.com>
 - ii. Enter your email address and 'Tyler' as the password
 - iii. Select your environment parameters
 - iv. View/save/print the server requirements and additional information
- b. Compare to existing servers and make any decisions regarding server size (whether you need more RAM, more disk space, etc.)
- c. Check reference documentation – see Appendix B
 - i. My New World portal site
https://ftp.newworldsystems.com/public_administration/login.asp
 - ii. List of other items you may wish to reference
- d. Build the new VMs
 - i. Create VMs

NOTE: You should keep the same drive letters and paths where possible, for consistency. Any changes could result in files or custom items not being found successfully on the new servers.
 - ii. Install Operating System and Activate Windows
 - iii. Set static IP address
 - iv. Update Windows
 - v. Join to Domain
 - vi. Add the Active Directory Service Account to local Administrators group
- e. Install and configure SQL Server – please consult documentation
 - i. Migrate or re-create user accounts and permissions
 - ii. Make sure MSDTC settings are in place on these servers as well
- f. Add Printers to App Server

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- i. Names should match EXACTLY including capitalization
 - ii. Should be logged in as the AD service account when installing printers
 - iii. Search for the printer yourself, add as Administrator, add by IP Address
- III. Transfer files and databases to new server
 - i. ...\\Logos.NET\\FileStorage\\Documents or Document Output Path from the ERP Management Console – Configuration page
 - ii. ...\\Logos.NET\\Custom
 - iii. ...\\Logos.NET\\ImportExport
 - iv. ...\\Logos.NET\\license.dat
 - v. SSRS Report Logo
 - 1. Copy over from old server
 - 2. Run script on new server to point
 - vi. DSS.dat file from Database/Reporting server
 - vii. **Restore databases from backup for each environment** (select the ones that you are using); Entries with an Asterisk should go on the Reporting Server, if there is a separate Reporting Server
 - 1. For each environment,
 - A. Main database (“LogosDB”, etc.)
 - B. HR Reporting Database (HR customers only)
 - C. eSuite database (eSuite customers only)
 - D. Logos Runtime Services (there may be only one)
 - E. * NWSDashboard
 - F. * NWSEnterpriseSecurity
 - 2. Other Tyler products (CAFR Builder, etc.): This guide does not currently cover components of other Tyler products.
 - viii. Custom Reports
 - 1. Download the RDL files from the current Database/Reporting Server
 - 2. Store them on the new server until it’s time to upload them to Reporting Services – you cannot do this until the data source and reports are set up by running the main installer
- IV. Install the My New World ERP Application (for each environment)
 - i. Follow the steps in the Installation Guide
 - ii. Configure the main service to Automatic startup
 - iii. Enter the license password and the Automatic Restart Time, in the ERP Management Console
 - iv. IMPORTANT: Restart the application server
 - v. Install the MIU (ships with 2017.1)
 - 1. SSH (port 22) must be open to ftp.munis.com
 - vi. Install other components according to their guides – as licensed and according to the instructions in the installation guides
 - 1. eSuite
 - 2. CD
 - 3. Dynamic Reports (Module Installer)
 - 4. DSS (Decision Support) –

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- A. schedule and test the processing job too
- V. Create and test SQL Server Maintenance Plans (information available in My New World)
- VI. Upload and custom SSRS reports to the Database/Reporting Server
 - i. Verify that folder and file name are exactly the same
 - ii. Change the Data Source to point to the logosdb data source
- VII. Install SSL Certificate on eSuite server
 - a. Follow your SSL certificate vendor's instructions on installing the certificate
 - b. Note that you may not want to do this until you are cutting over to use the servers
 - c. This server should be in the DMZ or have the proper port forwarding enabled
 - d. Make sure you update your firewall settings to allow traffic from here to the new application server
 - e. For the MIU agent, port 49876 must be open between the eSuite server and the application server
- VIII. Post-installation tasks and checks
 - a. Check import/export paths and settings
 - b. Setup any additional scheduled jobs or batch processes
 - c. Install the MIU (will ship with 2017.1 release)
 - i. A script will need to be run in order to allow previously applied hot fixes to re-run
 - d. Report generation, in the application
 - e. Windows Authentication
 - f. View reports
 - g. Setup/test printers

TEST THE NEW SERVERS

- I. Test the New World ERP functionality – usually end users will be involved here
- II. Check customized components identified during initial system documentation
- III. eSuite
 - a. Check connectivity
 - b. Check SSL
- IV. DSS
 - a. Check that jobs are running/completing successfully
 - b. Set up any necessary user security in Analysis Services
 - c. Any Excel spreadsheets for DSS need to have their data sources repointed to the new server (at least for testing), and permanently changed when cutting over to use the new servers

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CUT OVER TO NEW SERVERS

NOTE: Testing can take anywhere from a couple days to a couple weeks.

- I. Take current servers offline
 - a. Stop/disable services
 - i. Nwsappservice.exe
 - ii. Logos caching service
 - iii. eSuite.epermits.notification service
 - iv. IIS (Stop)
 - v. Back up databases
- II. Update data
 - i. Stop services, as above, on new servers – do not disable
 - ii. FileStorage/Documents
 - iii. Restore Databases from backups, onto new SQL Server(s)
 - iv. Set the Compatibility Mode to 2012
- III. Bring new servers back online – check out system for usability
 - a. Start services
 - b. Test Login
 - c. Test for basic functionality
 - i. If failed, and cannot troubleshoot, go back to using original servers
- IV. Users start using new servers
 - a. They will need to use the new URLs for the App server(s)
 - b. If SSL is used internally, they will need to browse using HTTPS://
 - c.
 - d. After a rebuild/restore, pages may be slow to load, the first time

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APPENDIX A: SERVER DOCUMENTATION SHEETS

Copy and paste the table for each server in your system

Environment	[Production, Test, etc.]	
Server Role		
Server Name		
IP Address		
# Virtual CPUs		
RAM		
Disk Volumes / Free space	System (C:) - D: E: F:	C: D: E: F:
Operating System version		
New world ERP version		
FileStorage\Documents path (for application servers)		

Environment	[Production, Test, etc.]	
Server Role		
Server Name		
IP Address		
# Virtual CPUs		
RAM		
Disk Volumes / Free space	System (C:) - D: E: F:	C: D: E: F:
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Environment	[Production, Test, etc.]	
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Disk Volumes / Free space	System (C:) - D: E: F:	C: D: E: F:
Operating System version		
New world ERP version		
FileStorage\Documents path (for application servers)		

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APPENDIX B: REFERENCES

- a. My New World Portal documents
 - i. https://ftp.newworldsystems.com/public_administration/login.asp
 - 1. New World ERP Install/Update Guide (PDF) – for your version of the application
 - 2. SQL Server Maintenance Plan recommendations
 - 3. Backup/Disaster Recovery document
 - 4. SQL Server – database backup/restore instructions
- b. SQL Server Installation Guide
- c. MIU installation guide (released with 2017.1 version)

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APPENDIX C: CHECKLISTS

I. Document and Build New Environments

- ☐ Document current server settings
- ☐ Generate and record new server settings
- ☐ Build/Configure new servers
 - ☐ Build: Install OS, name, join to Domain, update, activate
 - ☐ Transfer: Files and database backups
- ☐ Install and configure SQL Server; restore databases and create users
- ☐ Install application
 - ☐ Main
 - ☐ CD
 - ☐ eSuite
 - ☐ DSS
- ☐ Apply Hot Fixes
- ☐ Create and test SQL Server Maintenance Plans

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II. Test New Servers

- ☐ Login
- ☐ Basic functionality and Reports
- ☐ End-user validation, by module (FM, HR, etc.)
- ☐ DSS
- ☐ eSuite

III. Cut over to new servers – from same New World ERP application version

- ☐ Take current and new servers offline
- ☐ Disable services on current servers
- ☐ Copy data over (differential) - FileStorage, Databases, etc.
- ☐ Start services on new servers
- ☐ Test