

HR Reporting 2018.1 Installation Guide

New World ERP – Human Resources/Payroll



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INTRODUCTION

The New World ERP HR Reporting Installer installs the necessary components for the Affordable Care Act feature.

Note: Run this installer only if you are a New World ERP Human Resources/Payroll customer.

This document provides step-by-step instructions for running the installer and shows the dialogs you will encounter along the way.

Please review all steps before beginning.

IMPORTANT NOTE

If you are running a program called Dell AppAssure, a disaster recovery program that monitors SQL servers and assists with backups, you will be unable to install the LogosRuntimeServices and HR Reporting databases due to locks on the model database. To avoid these locks, you will need to stop the following service prior to installing the update on the database server. Stopping this service will clear the connections that are open against the model database and will allow our installers to create the two new databases:



The link below will take you to a knowledge base article from Dell explaining the issue. The workaround Dell describes involves entering a bad password into their agent service so that it cannot monitor the database server with this service.

<https://support.software.dell.com/appassure/kb/119742>

INSTALLER PREREQUISITES

- SQL Server 2012, 2014, 2016 or 2017 with SSIS and SSRS
- .NET 4.6
- Windows Server 2016 users may use Microsoft .NET 4.6, 4.6.1 and 4.6.2.

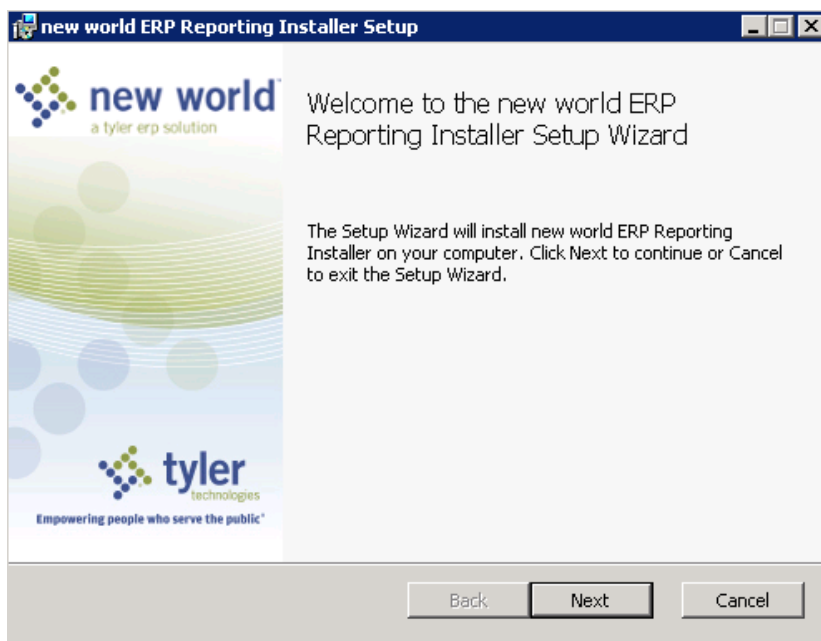
BEFORE YOU INSTALL

If you are upgrading the New World ERP Reporting software, please make a backup copy of the New World ERP Reporting database(s).

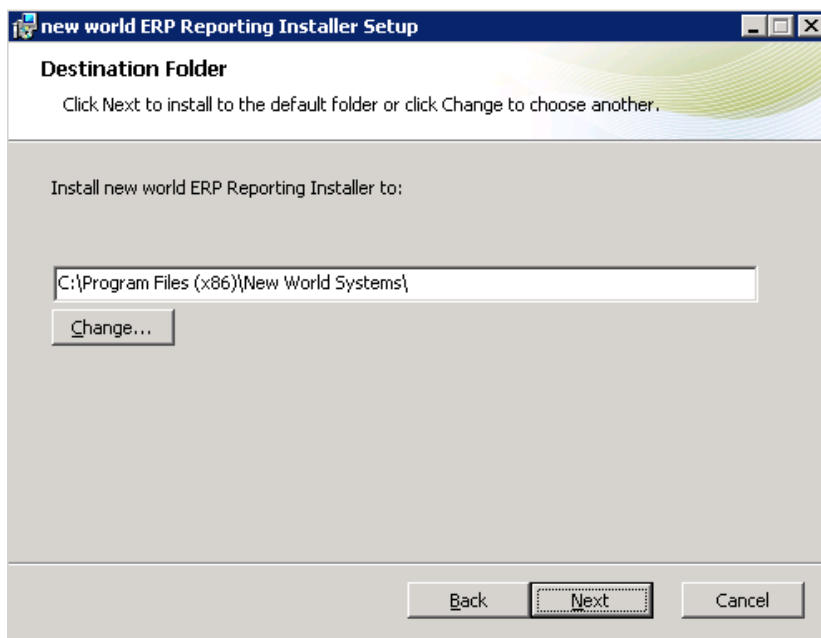
INSTALL SEQUENCE

Before upgrading New World ERP, follow these steps to install the reporting software:

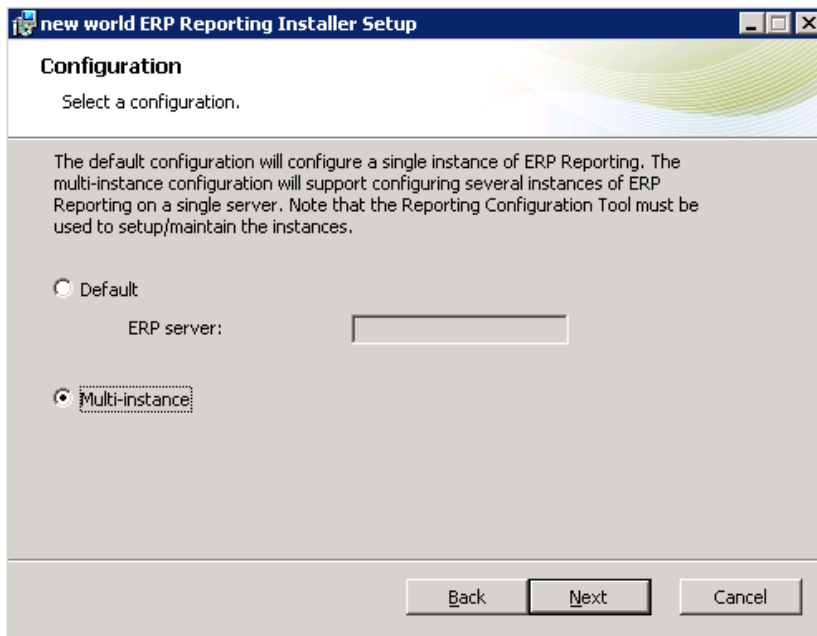
1. Copy the *Reporting_<Version>* folder to the computer running SQL Server.
2. Double-click the *setup.exe* file. You will see the following screen:



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



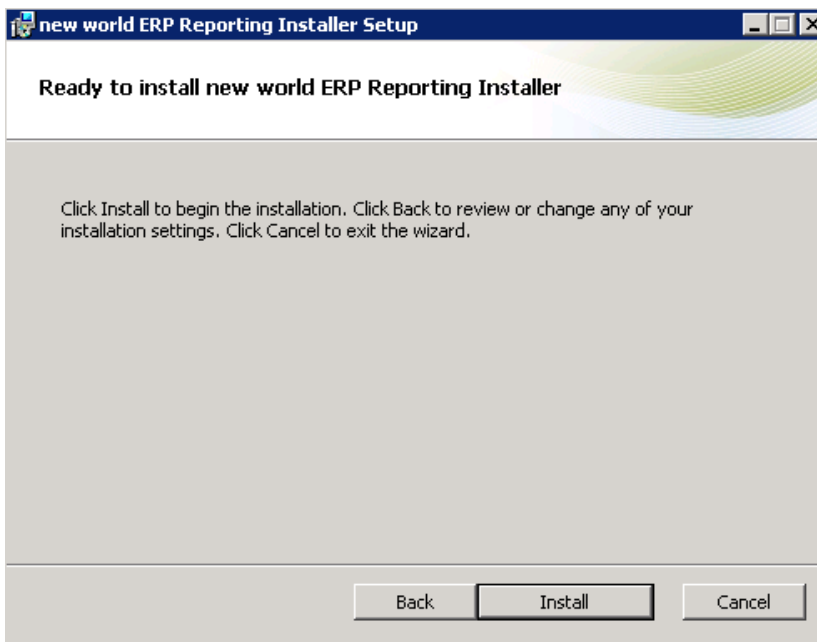
4. If you prefer, you may use this dialog to change the install location of the software.
5. Click **Next**. The Configuration dialog will display:



6. Use this dialog to configure one or more instances of New World ERP Reporting. Select *Multi-instance* for all configurations.

Note: You must use the New World ERP Reporting Configuration Tool to set up and maintain the multiple reporting instances.

7. Click **Next**. The Ready to Install dialog will display:



8. Click **Install** to begin the installation.

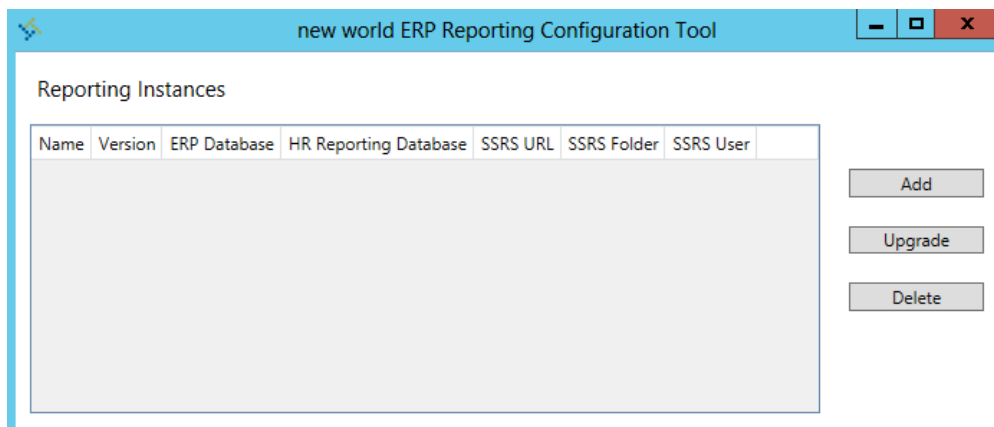
SETTING UP REPORTING INSTANCES WITH THE CONFIGURATION TOOL

This section details the setup of New World ERP Reporting using the configuration tool. (Note: The configuration tool is needed only if the Multi-instance mode was selected in the installer.) This tool performs the following functions:

- **Add:** creates an instance of New World ERP reporting
- **Upgrade:** upgrades an instance of New World ERP reporting
- **Delete:** deletes an instance of New World ERP reporting

ADD INSTANCE

1. Launch the New World ERP Reporting Configuration Tool (All Programs > Tyler Technologies > Reporting > Reporting Configuration Tool):



2. Click the **Add** button. The Reporting Instance Name dialog will display:

Reporting Instance Name

new world ERP Server

SQL Server Reporting Services URL

ERP SSRS Deployment Folder

☒ Windows Authentication
☐ Specify User

SSRS User (i.e. Domain\User)

Password

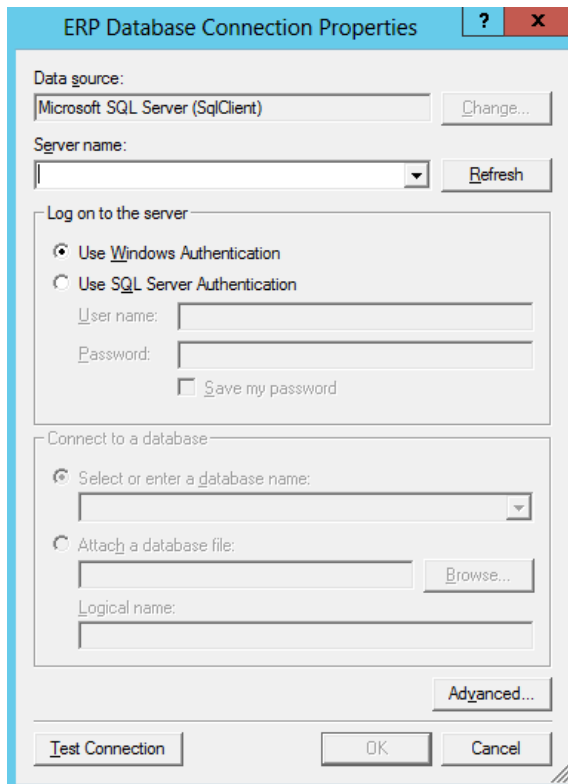
Next Cancel

3. Fill in the information requested.

Note: If you do not remember the name of the New World ERP SSRS deployment folder when upgrading, launch the Microsoft SQL Reporting Services Configuration Manager program. Then select the Report Manager URL tab and click on the hyperlink. The New World ERP deployment folder should be one of the folders shown. The same deployment folder name needs to be used in both the Reporting and New World ERP installers.

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.asmx>.

4. Click **Next**. The New World ERP Database Connection Properties dialog will display:



The image shows a Windows-style dialog box titled "ERP Database Connection Properties". It has a standard title bar with a question mark icon and a close button (X). The dialog is divided into several sections:

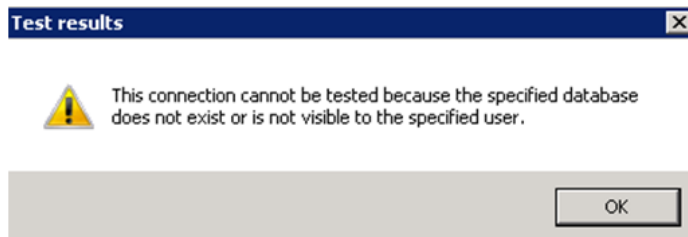
- Data source:** A text box containing "Microsoft SQL Server (SqlClient)" and a "Change..." button to its right.
- Server name:** A dropdown menu that is currently empty, with a "Refresh" button to its right.
- Log on to the server:** A section containing two radio buttons:
 - ☒ Use Windows Authentication
 - ☐ Use SQL Server Authentication
 Below these are text boxes for "User name:" and "Password:", and a checkbox labeled "Save my password" which is currently unchecked.
- Connect to a database:** A section containing two radio buttons:
 - ☒ Select or enter a database name: Below this is a dropdown menu.
 - ☐ Attach a database file: Below this is a text box and a "Browse..." button.
 Below these is a text box labeled "Logical name:".

At the bottom of the dialog, there are three buttons: "Test Connection", "OK", and "Cancel". An "Advanced..." button is also present, located to the right of the "Connect to a database" section.

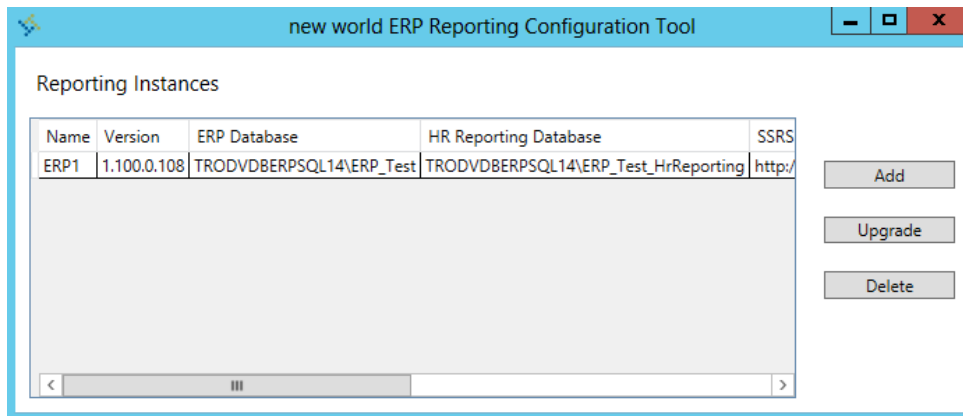
5. Fill in the information requested for the New World ERP database.
6. Click **OK**. The HR Reporting Database Connection Properties will display. A new HR Reporting database will be created named *<New World ERP Database Name>_HrReporting*:

Note: The SQL user must have rights to create a database. The apostrophe/single tick character (') is not supported in this user's password.

Since the database has not been created at this time, clicking the Test Connection button will display the following message:



7. Click **OK**. After a brief period, the instance will be created:

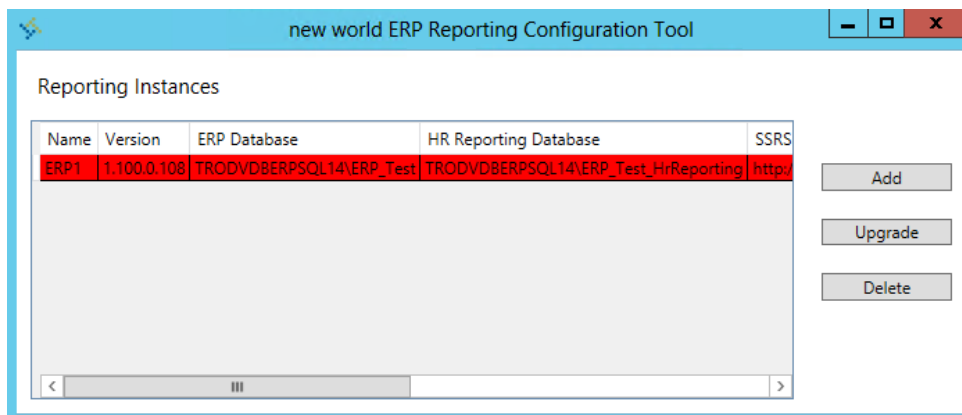


8. If other instances are needed, repeat steps 2-7.

Note: The version number could be different from the New World ERP version number. The first two fields (e.g. 9.0) should match the New World ERP version number.

UPGRADE INSTANCE

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:



1. Select the instance that will be upgraded.
2. Click the **Upgrade** button.
3. Click the **Yes** button to confirm that the instance should be upgraded. After a brief period, the instance will be upgraded.

DELETE INSTANCE

1. Select the instance that will be deleted.
2. Click the **Yes** button to confirm that the instance should be deleted. After a brief period, the instance will be deleted.

POST-INSTALLATION GUIDELINES

After the reporting service is installed, a SQL server job named <LOGOS
ServerName>_LOGOSReportingProcess will be created on the SQL server:

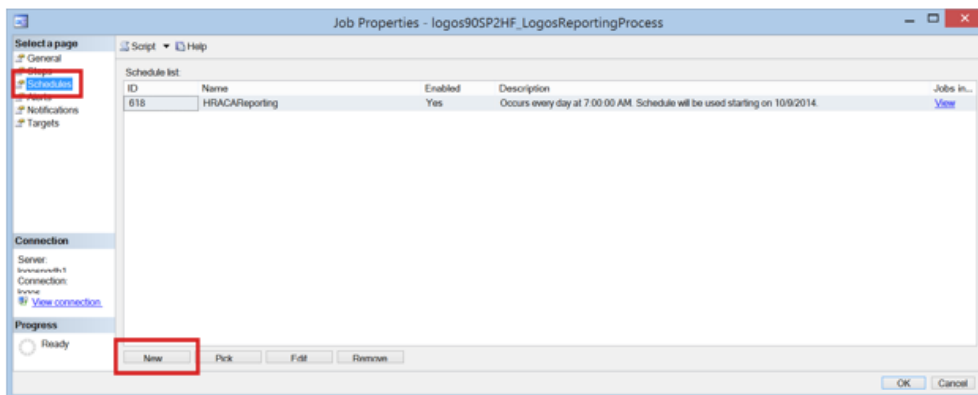
SQL Server Agent

Jobs

logos90SP2HF_LogosReportingProcess

You need to set up a schedule to run this job. Once the schedule is set up, the SQL server job will process automatically according to the schedule. The following steps show you how to set up a schedule:

1. Right-click the job (*LOGOS90SP2HF_LOGOSReportingProcess*) to open the Job Properties window:



2. Select the **Schedules** page in the left pane. This action displays the Schedule list in the right pane. (If you are setting up the first schedule, the list will be empty.)
3. Click the **New** button in the bottom-left corner of the window. A New Job Schedule dialog will open:

New Job Schedule

Name: Jobs in Schedule

Schedule type: ☒ Enabled

One-time occurrence

Date: Time:

Frequency

Occurs: (highlighted with a red box)

Recurs every: day(s)

Daily frequency

☒ Occurs once at:

☐ Occurs every: hour(s)

Starting at:

Ending at:

Duration

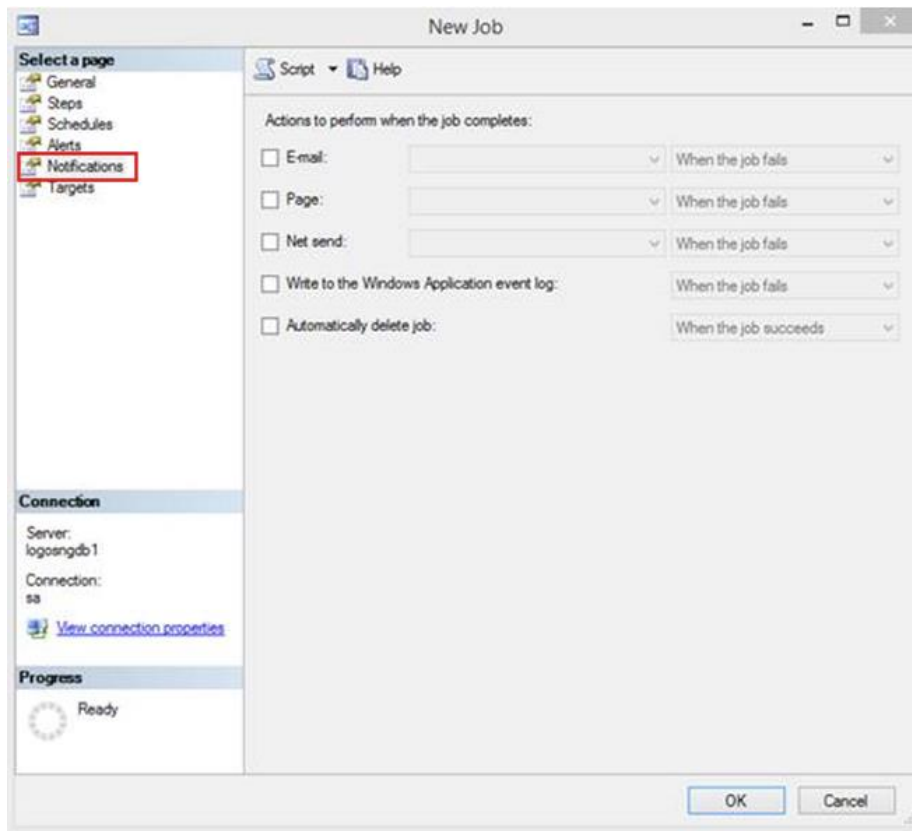
Start date: ☐ End date:

☒ No end date:

Summary

Description:

4. Set up the process to run **Daily**. (Make sure it runs after the reporting service has been installed).
5. Click **OK** to close the dialog. The new schedule will appear in the Schedule list.
6. If interested in receiving a notification when a job completes, select the *Notifications* page in the left pane.



7. Select the desired action (e.g. **e-mail**). Please refer to the SQL Server documentation for the steps needed to set up the desired action; for example, the e-mail action requires the following:
 - a. Database Mail feature configured (e.g. creating e-mail profile and specifying SMTP account).
 - b. SQL Server Agent properties configured to enable e-mail profile under Alert System.
 - c. SQL Server Agent has an operator defined that will receive the e-mail.
 - d. Restart the SQL Server Agent service to have changes take effect.
8. Click **OK** to close the Job Properties window.
9. Take a daily/hourly backup of the HR Reporting database.