

New World ERP-eSuite 2018.1

INSTALLATION GUIDE

April 9, 2018

Review important information for installing this release:

☐ SSL is required for eSuite Services and Website servers.

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New World ERP-eSUITE 2018.1 INSTALLATION GUIDE

This document will take you through the download of the eSuite product and the installation and configuration of the application.

Important Notes

- This release supports the creating and running of several instances of the eSuite website on one server.
- You may run the eSuite websites installer in default mode or multi-instance mode. The default mode installs the eSuite websites and configures IIS in the same structure as the legacy eSuite installer. The multi-instance mode installs only the files needed to create multiple instances of the websites. An eSuite website configuration tool also is installed to allow the creation and maintenance of several instances of the websites; as of this release, however, you will need a dedicated server for each instance hosting New World ERP and the eSuite services.
- The eSuite installation guide is intended for use only with Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2 and Windows Server 2016.
- Microsoft .NET Framework 3.5 and 4.6 are required.

NOTE:

In most 2008 environments, .NET Framework 3.5 is installed as part of the OS and may not show up in the list.

NOTE:

Windows Server 2016 users may use Microsoft .NET 4.6, 4.6.1 and 4.6.2.

eSuite Download

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]

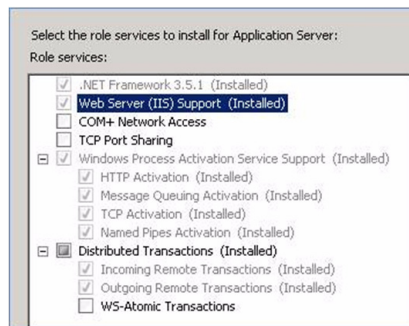
Before You Install

Several tasks need to be performed on the server before eSuite is installed.

Windows Server 2008/2008 R2 Server Setup

Application Server Role

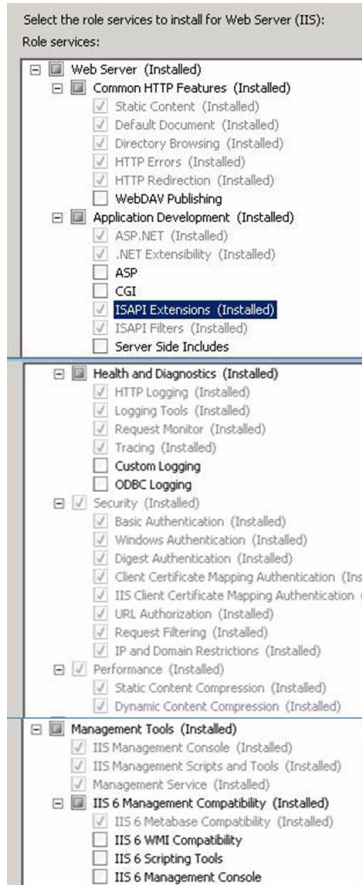
- 1 Run Server Manager.
- 2 In Server Manager, verify the Application Server Role has the following services installed (note that Windows Server 2008 does not have the .NET Framework 3.5.1 option):



Web Server (IIS) Role

- 1 Run Server Manager.

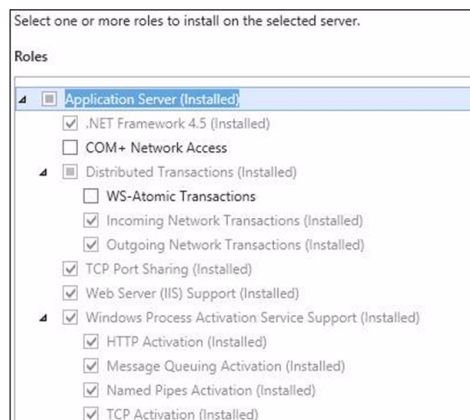
- 2 In Server Manager, verify the Web Server Role has the following services installed:



Windows Server 2012 Server Setup

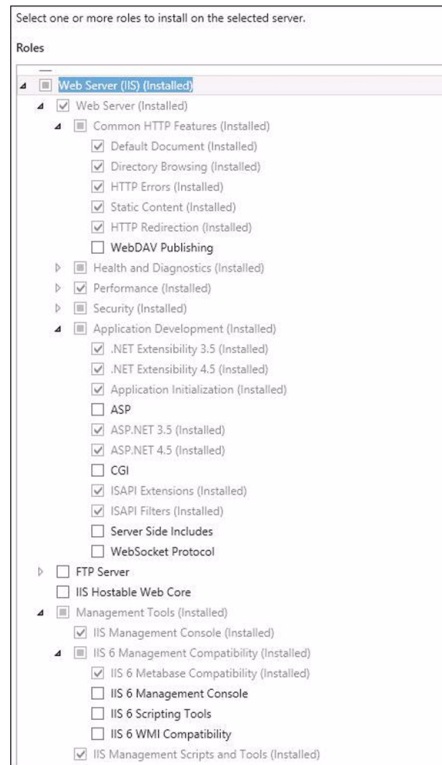
Application Server Role

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



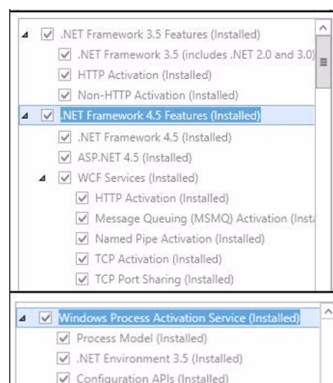
Web Server (IIS) Role

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



Installing Other Features

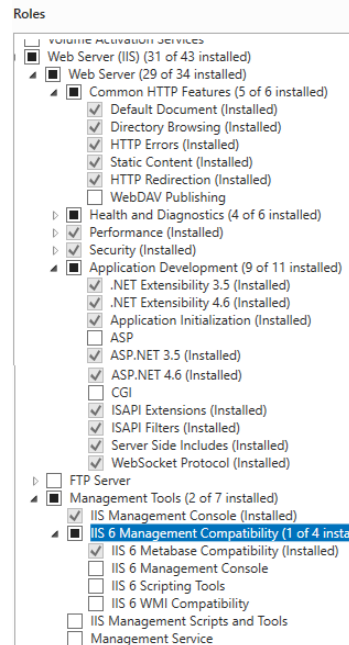
- 1 Run Server Manager.
- 2 In Server Manager, verify the following features are installed:



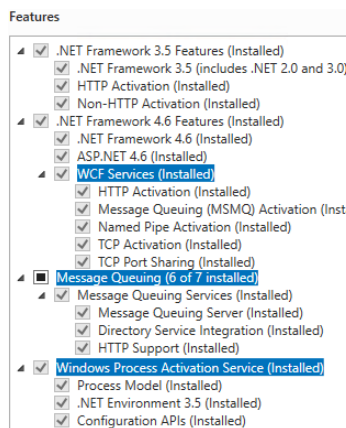
Windows Server 2016 Server Setup

- 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.



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

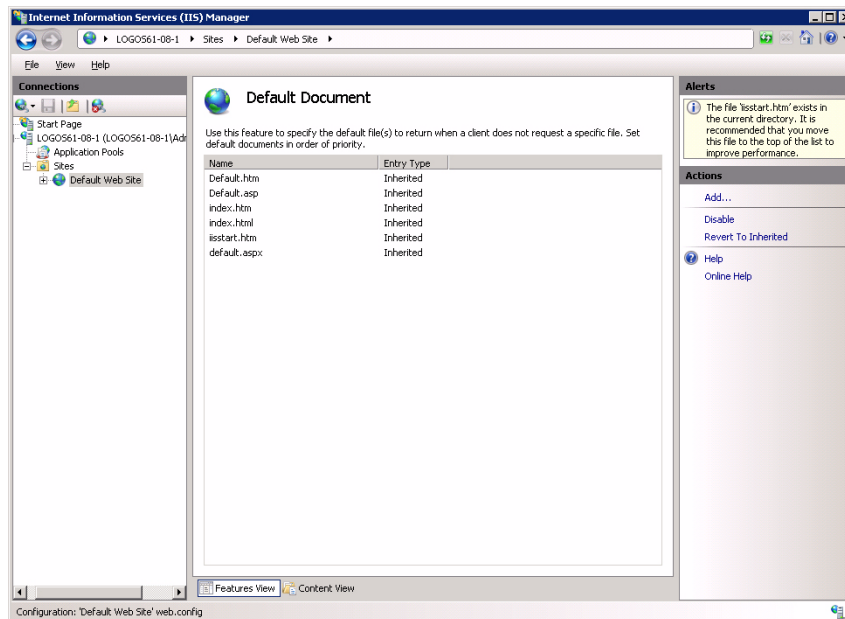


IIS

Default Documents (Server where application websites will run)

On a server running eSuite websites, two default documents must be in place for eSuite, default.aspx and login.aspx.

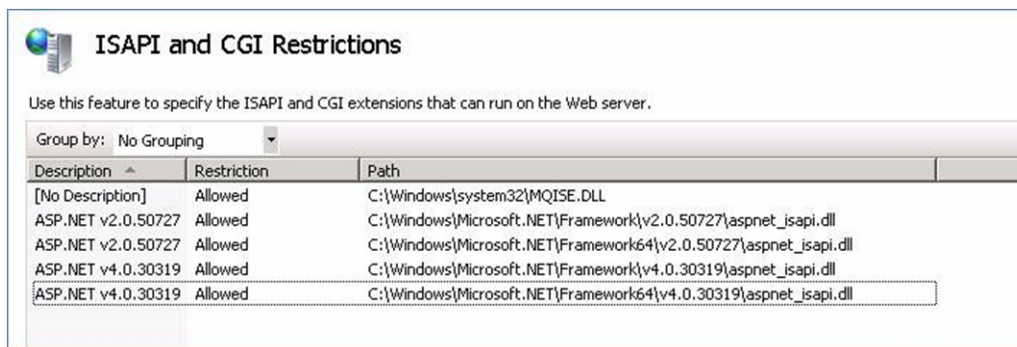
- 1 From the left side of the IIS Manager page, click **Default Web Site**. Groups of icons display on the right.
- 2 Double-click the **Default Document** icon. You will see the following screen:



- 3 In this case, default.aspx exists, but login.aspx needs to be added. On the right side of the screen, click **Add**.
- 4 Type **login.aspx** in the Add Default Document popup.
- 5 Click **OK**. The document is now added.

ISAPI and CGI Restrictions

Under IIS Manager > ISAPI and CGI Restrictions, verify that ASP.NET v4 is set to **Allowed**:



NOTE:

The ISAPI and CGI restrictions should be done on the eSuite and application servers.

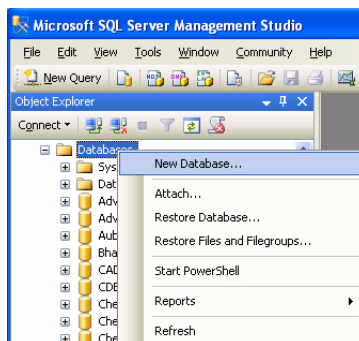
Create eSuite Database

NOTE:

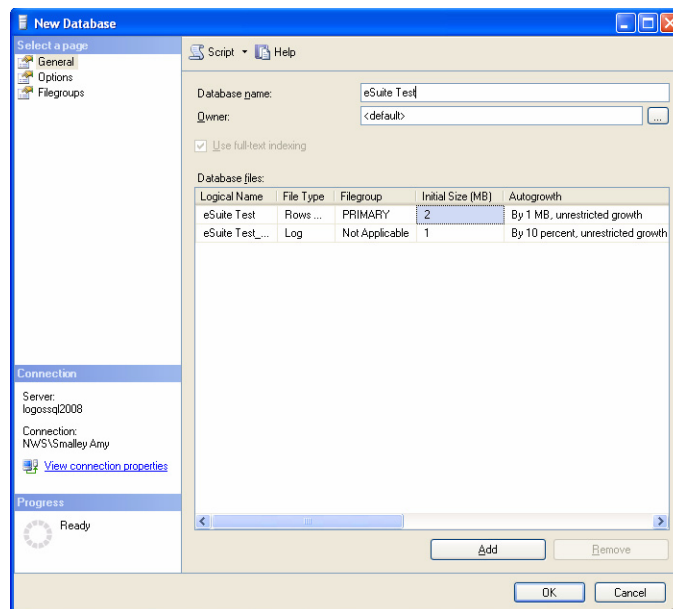
Perform the steps in this section only if this is your initial installation of eSuite. If this is an update/upgrade, use your existing eSuite database.

On the initial installation, an eSuite database will need to be created in SQL Server Management Studio.

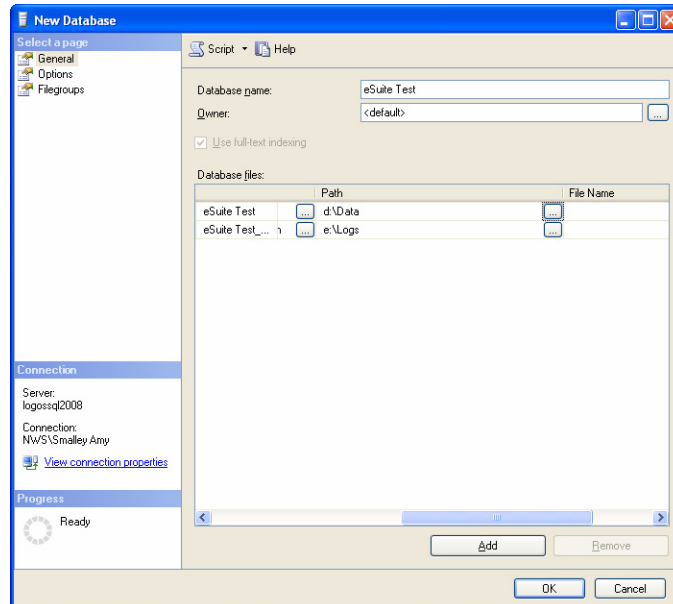
- 1 In the Object Explorer pane, right-click **Databases** and select **New Database**:



- The New Database popup will launch:



- Type the name you want to give the database in the *Database name* field. It will populate the *Logical Name* column, as shown above.
- Use the horizontal scroll bar to scroll right until you see the path column:



- To make the files easy to find, consider putting the data file and the log files in the same place where you install your New World ERP databases.
- Click **OK** to create the database.

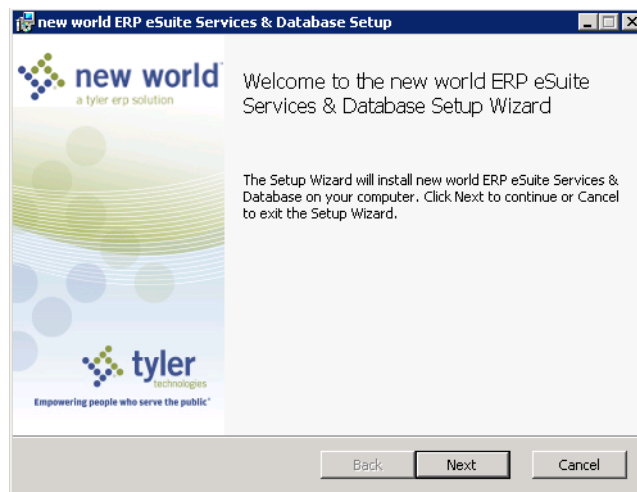
eSuite Services and Database Installer Sequence

The eSuite Administration site is now installed with the eSuite services and, therefore, installed on the ERP application server. The URL to access the administration site will now be <https://ERPAPPSERVER/Domain.XYZ/esuite.administration>.

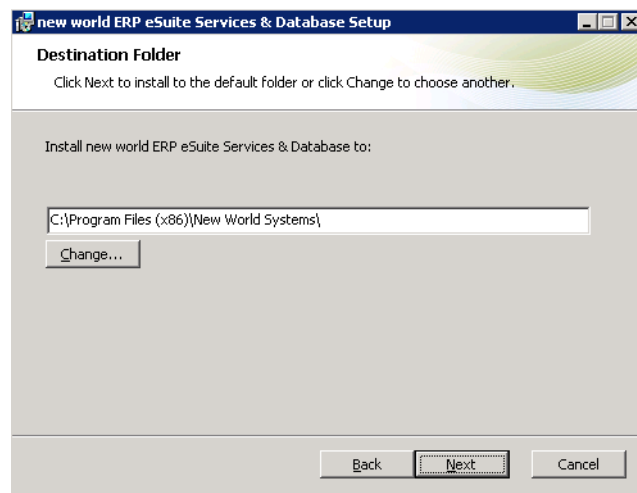
NOTE:

The server(s) hosting the ERP App Server and eSuite Services require a certificate bound to port 443 on the Default Web Site

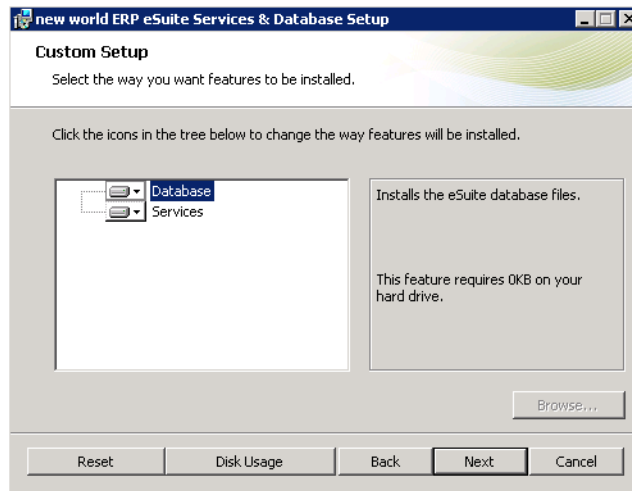
- 1 Create a backup of the eSuite database.
- 2 On the eSuite Services server (typically, the New World ERP application server), run the eSuite Services and Database installer, *Setup.exe*. Below is the first dialog of the New World ERP eSuite Services and Database Setup Wizard:



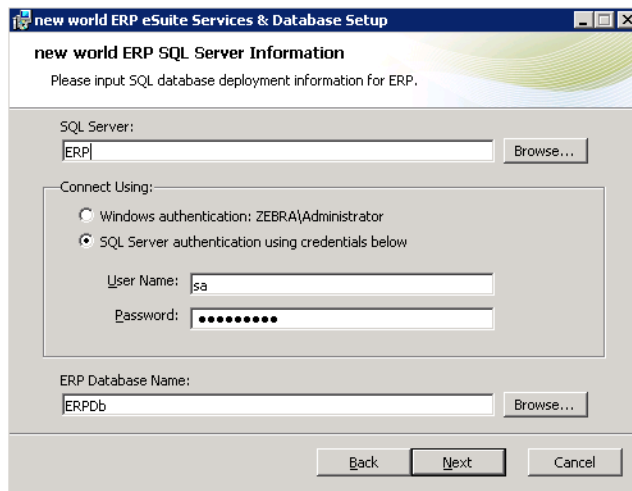
- 3 Click **Next**. The Destination Folder dialog will display:



- 4 If you do not want to accept the default location for installing the New World ERP eSuite Services and Database, click the **Change** button to select another location.
- 5 Click **Next**. The Custom Setup dialog will display:

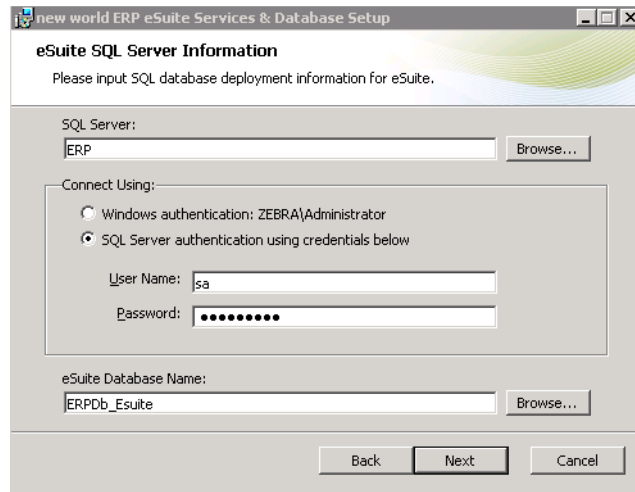


- 6 Click the **Database** and **Services** icons to change the way features will be installed.
- 7 Click **Next**. The New World ERP SQL Server Information dialog will display:



- 8 In the *SQL Server* field, enter the server, or click the **Browse** button to select it from the appropriate location.
- 9 In the *Connect Using* section, select **Windows authentication** or **SQL Server authentication using credentials below**.
- 10 If you select the **SQL Server authentication** option in step 9, type the *User Name* and *Password*.
- 11 Type the *ERP Database Name*, or click the **Browse** button to select it from the appropriate location.

12 Click **Next**. The eSuite SQL Server Information dialog will display:



The dialog box is titled "new world ERP eSuite Services & Database Setup" and "eSuite SQL Server Information". It prompts the user to "Please input SQL database deployment information for eSuite." The fields include:

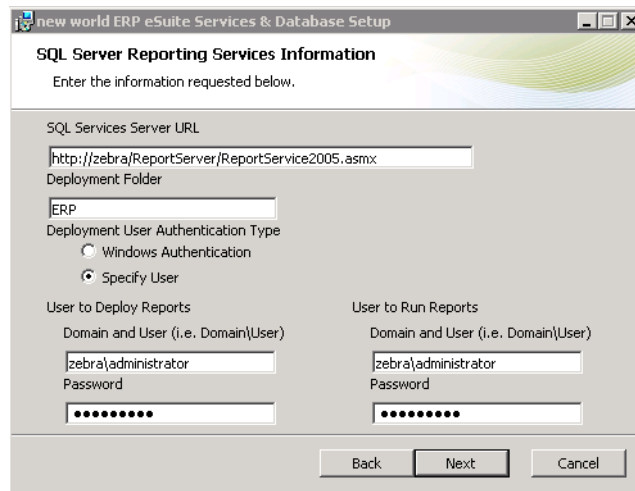
- SQL Server: ERP (with a Browse... button)
- Connect Using:
 - ☐ Windows authentication: ZEBRA\Administrator
 - ☒ SQL Server authentication using credentials below
- User Name: sa
- Password: (masked with dots)
- eSuite Database Name: ERPDb_Esuite (with a Browse... button)

 At the bottom are Back, Next, and Cancel buttons.

 NOTE:

Releases in 2018 will require SQL 2012, 2014, 2016 or 2017.

- 13 In the *SQL Server* field, enter the server, or click the **Browse** button to select it from the appropriate location.
- 14 In the *Connect Using* section, select **Windows authentication** or **SQL Server authentication using credentials below**.
- 15 If you select the **SQL Server authentication** option in step 14, type the *User Name* and *Password*.
- 16 Type the *eSuite Database Name*, or click the **Browse** button to select it from the appropriate location.
- 17 Click **Next**. The SQL Server Reporting Services Information dialog will display:



The dialog box is titled "new world ERP eSuite Services & Database Setup" and "SQL Server Reporting Services Information". It prompts the user to "Enter the information requested below." The fields include:

- SQL Services Server URL: http://zebra/ReportServer/ReportService2005.aspx
- Deployment Folder: ERP
- Deployment User Authentication Type:
 - ☐ Windows Authentication
 - ☒ Specify User
- User to Deploy Reports:
 - Domain and User (i.e. Domain\User): zebra/administrator
 - Password: (masked with dots)
- User to Run Reports:
 - Domain and User (i.e. Domain\User): zebra/administrator
 - Password: (masked with dots)

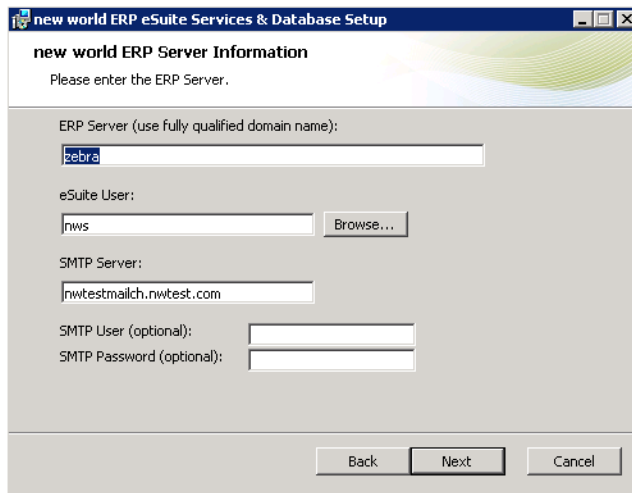
 At the bottom are Back, Next, and Cancel buttons.

- 18 Type the *SQL Services Server URL* and **<Tab>** out. The URL will auto-fill based on the server name.

 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>.*

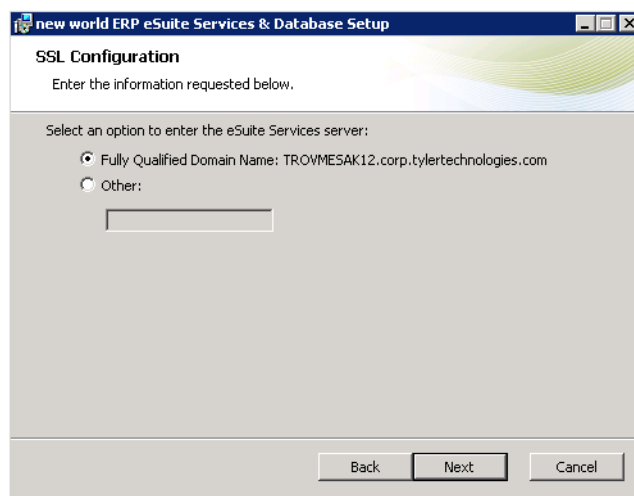
- 19 Type the name of the *Deployment Folder*.
- 20 In the **User to Deploy Reports** section, select *Deployment User Authentication Type*. Type the *Domain and User* and the *Password* if the **Specify User** option was selected.
- 21 In the *User to Run Reports* section, type the *Domain and User* and the *Password*.
- 22 Click **Next**. The New World ERP Server Information dialog will display:



The screenshot shows a Windows-style dialog box titled "new world ERP eSuite Services & Database Setup". Inside, there's a section titled "new world ERP Server Information" with the instruction "Please enter the ERP Server." Below this, there are several input fields: "ERP Server (use fully qualified domain name):" with the text "zebra" entered; "eSuite User:" with the text "nws" entered and a "Browse..." button next to it; "SMTP Server:" with the text "nwtestmailch.nwtest.com" entered; and two optional fields for "SMTP User (optional):" and "SMTP Password (optional):". At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

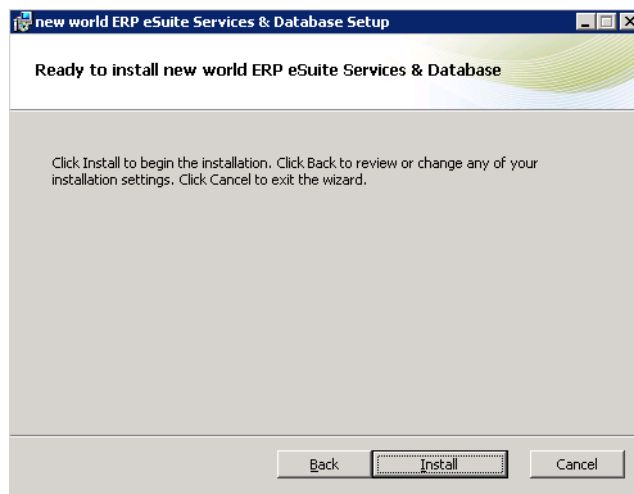
- 23 Type the name of the *ERP Server* using the fully qualified domain name.
- 24 Type the name of the *eSuite User*, or click the **Browse** button to select the name from the appropriate location.
- 25 Type the name of the *SMTP Server*.
- 26 If desired, you also may type an *SMTP User* and *SMTP Password*.

27 Click **Next**. The SSL Configuration dialog will display:



28 Select the **Fully Qualified Domain Name** radio button. If your SSL cert hostname is different from the FQDN, choose the **Other** radio button and enter your cert name.

29 Click **Next**. The dialog to begin the installation will display:



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

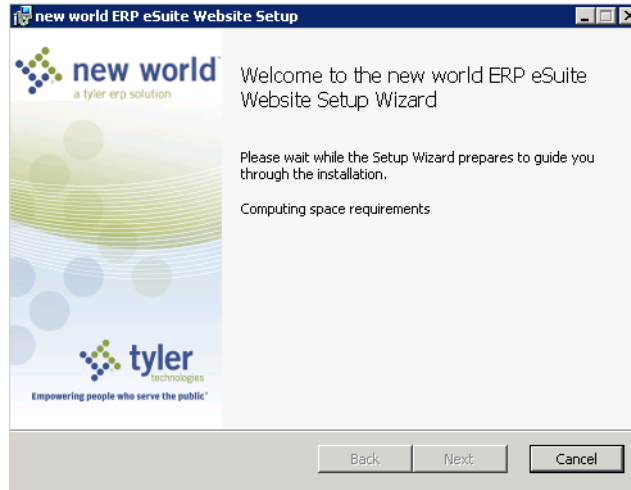


NOTE:

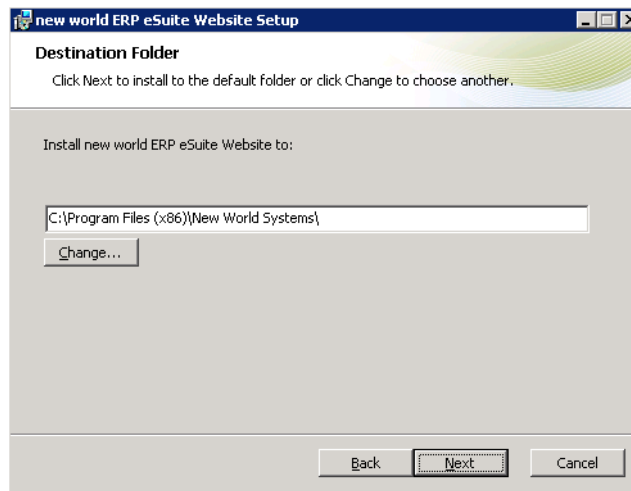
See Appendix A for information on the product registration process following installation.

eSuite Website Installer Sequence

- 1 On the eSuite Website server, run the eSuite Website installer, *Setup.exe*. Below is the first dialog of the eSuite Website Setup Wizard:

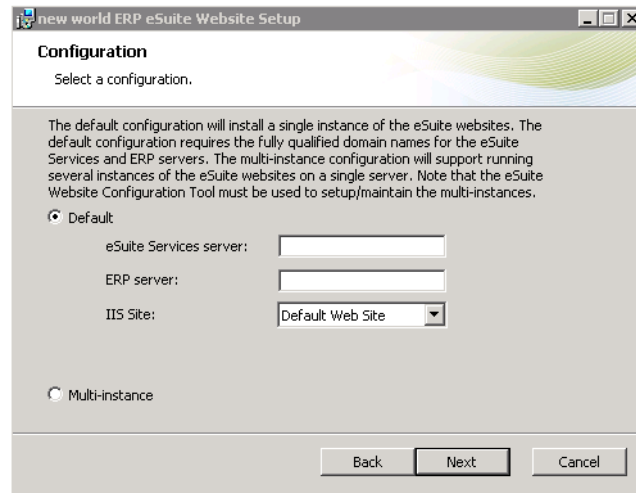


- 2 Click **Next**. The Destination Folder dialog will display:



- 3 If you do not want to accept the default location for installing the New World ERP eSuite website, click the **Change** button to select another location.

- 4 Click **Next**. The Configuration dialog will display:



NOTE:

*The **eSuite Services server** and the **ERP server** typically are the **New World ERP application server**. Since **SSL** is required on the app server, use the **FQDN** on the app server or the **hostname** for the cert.*

- 5 Use this dialog to configure one or more instances of the eSuite websites.

Select *Default* to install and configure one instance of the eSuite websites. This selection requires the fully qualified domain names for the eSuite services and ERP servers. Also select the *IIS Site*.

NOTE:

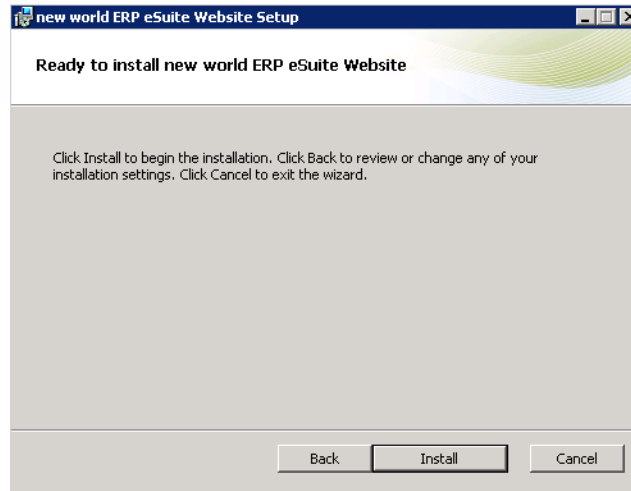
Currently, only the default option will allow users to install the eSuite websites to an IIS site other than the Default Web Site. The multi-instance mode will only install the eSuite websites to the Default Web Site.

Select *Multi-instance* to install and configure several instances of the eSuite websites on one server.

NOTE:

You must use the eSuite Website Configuration Tool to set up and maintain multi-websites (e.g. upgrading specific instances to newest version of the software). At most sites, the Website Configuration Tool will not apply. This setup is for customers with multiple instances of eSuite websites running on the same web server.

- 6 Click **Next**. The dialog to begin the installation will display:



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



NOTE:

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

Setting up eSuite Websites with the Configuration Tool

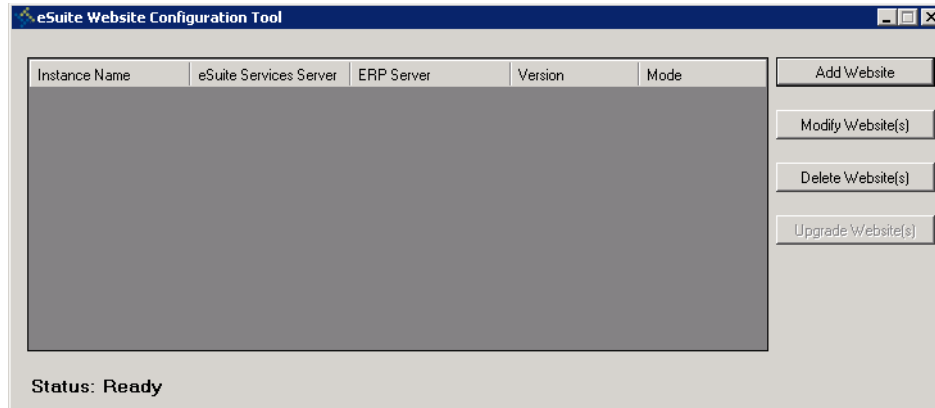
This section steps you through the setup of the eSuite websites using the configuration tool. **(Note: The configuration tool is needed only if *Multi-instance mode* was selected in the installer.)** This tool performs the following functions:

- Create Website: creates an instance of the eSuite websites
- Modify Website(s): modifies the eSuite Services server
- Delete Website(s): deletes an instance of the eSuite websites
- Upgrade Website(s): upgrades an instance of the eSuite websites with the newest version of the software

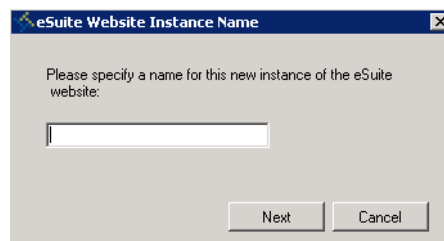
The eSuite websites are set up through an installation and configuration phase:

Create Website

- 1 Launch the eSuite Website Configuration Tool (**All Programs > Tyler Technologies > eSuite Configuration Tool**):



- 2 Click the **Add Website** button. The eSuite Website Instance Name dialog will display:

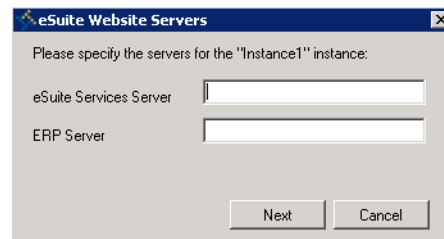


- 3 Type the name for this instance of the eSuite websites.

NOTE:

This version of eSuite can support several instances of the eSuite websites running on one IIS web server.

- 4 Click **Next**. The eSuite Website Servers dialog will display:



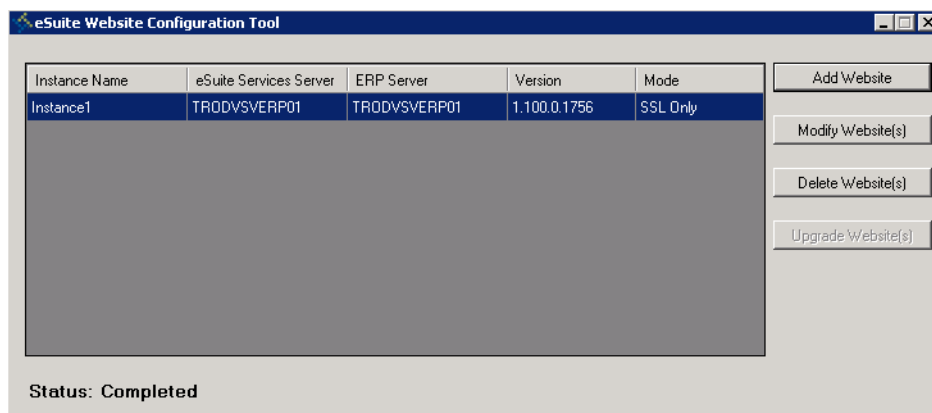
- 5 Type the name of the eSuite Services Server.

**NOTE:**

Whatever input is used in the **eSuite Services Server** name should be inputted exactly in the **Managed Internet Update's Application Server** variable back on the application server. The MIU uses this value to determine which eSuite instance to update when applying patches.

- 6 Type the name of the *ERP Server*.
- 7 Click **Next**. The eSuite websites will be set up automatically. After a brief period, the eSuite websites will be ready for use.

To complete the setup, this computer must be able to communicate with the eSuite Services and New World ERP computers. The image below shows the tool with the completed eSuite websites instance:



- 8 If other eSuite website instances are needed, repeat steps 2-8.
- 9 The parent URL for the eSuite website instance is as follows:
https://<server>/esuite_<instance_name>
 Below is an example URL to access the HR portal employee login page:
https://erptest/esuite_instance1/Websites.HR.Portal/Default.aspx

Modify Website(s)

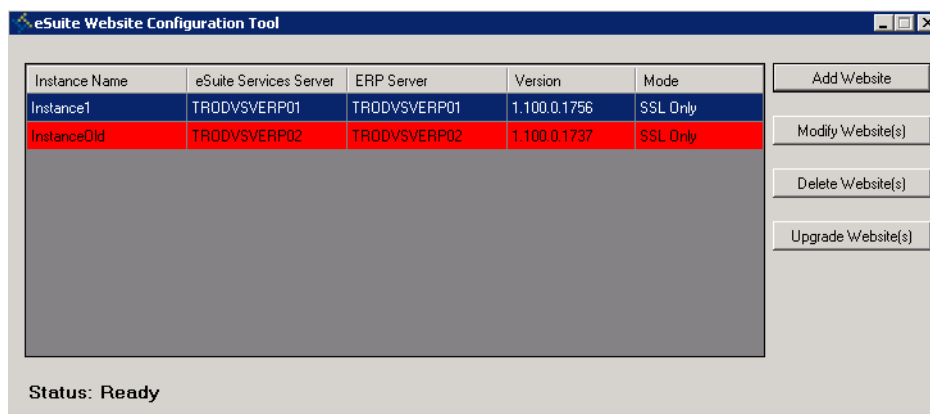
- 1 Select the eSuite instance(s) that will be pointing to a different eSuite Services or New World ERP computers. Change the mode if needed.
- 2 Click the **Modify Website(s)** button.
- 3 Click the **Yes** button to confirm that the server should be changed.
- 4 Type the desired eSuite Services and New World ERP computer names and mode.
 To complete the change, this computer must be able to communicate with the eSuite Services and New World ERP computers.

Delete Website(s)

- 1 Select the eSuite instance(s) that will be deleted.
- 2 Click the **Delete Website** button.
- 3 Click the **Yes** button to confirm that the instance should be deleted.

Upgrade Website(s)

If a newer version of the eSuite websites software has been installed on the computer, the current instance(s) may be upgraded. As shown below, all instances that are not at the latest version will be highlighted in red. The first row will be highlighted in blue until another row is selected, even if that instance can be upgraded:



- 1 Select the eSuite instance(s) that will be upgraded.
- 2 Click the **Upgrade Website(s)** button.
- 3 Click the **Yes** button to confirm that the instance should be upgraded. After a brief period, the eSuite websites will be ready for use with the latest version of the software.

Connect eSuite to New World ERP Services

NOTE:

The steps in this section need to be performed only if your organization is using the eBids module.

To enable eBid services, eSuite must be connected to the New World ERP Services. If your New World ERP Services have been installed in a separate location than eSuite, please execute the following instructions.

Update eBid Settings (If you will be using eBids)

- 1 Go to eSuite.eBid, in eSuite Services directory (i.e., **C:\Program Files (x86)\New World Systems\eSuite Services\Services\NewWorld.eSuite.FM.Services.Bid**) and open the web.config file.
- 2 Change the web.config to point to the New World ERP document file storage location. This will tell the web.config where the file storage service is:

```
<add key="FileServerURI" value="net.tcp://YOURLOGOSSERVERNAME:10099/  
NewWorld/FileStorage/" />
```

```
<add key="FileServerEndpointAddress" value="net.tcp://  
YOURLOGOSSERVERNAME:10099/NewWorld/FileStorage/TCP" />
```
- 3 Change the *Server Name* to the server where the New World ERP Services are installed.
- 4 Save the web.config file.

File Storage Service for eBids Installation (If you will be using eBids)

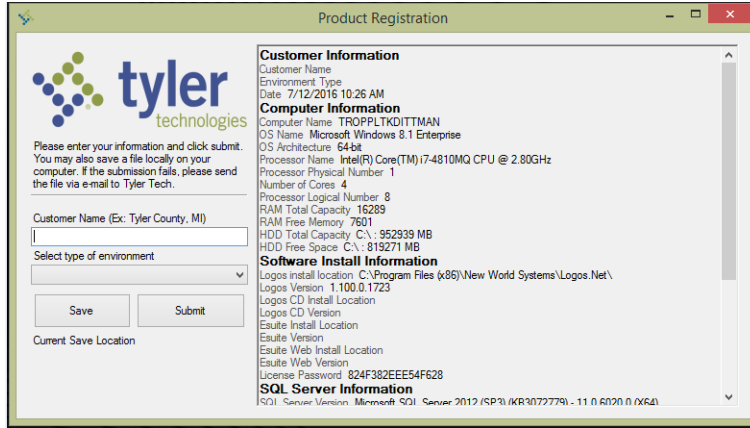


NOTE:

The New World ERP staff should perform the installation of the file storage service.

Appendix A: Product Registration

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

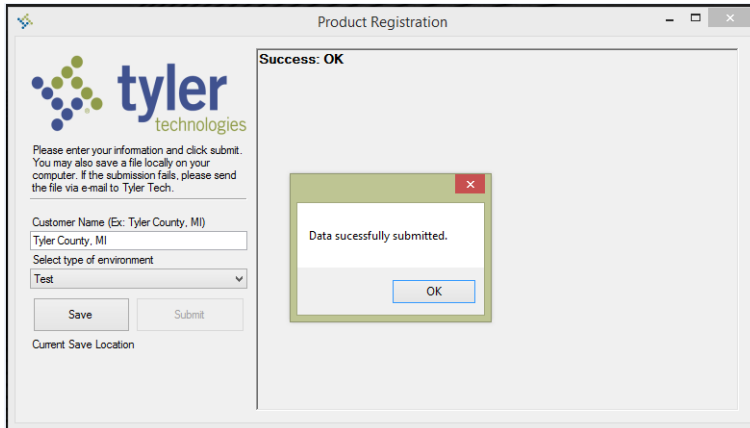


The Product Registration window displays the following information:

- Customer Information:** Customer Name, Environment Type, Date (7/12/2018 10:26 AM).
- Computer Information:** Computer Name (TROPLTKDITMAN), 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 (824F382EE54F628).
- SQL Server Information:** (SQL Server Version, Microsoft SQL Server 2012 (SP3) (KB98072779) - 11.0.6020.0 (X64)).

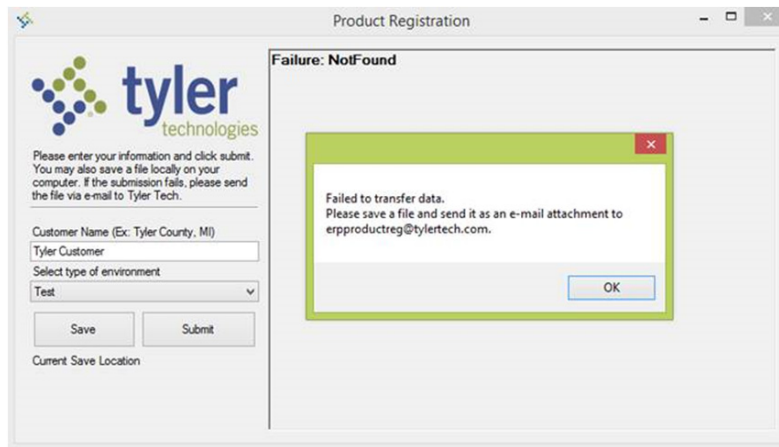
On the left, there is a form with the Tyler Technologies logo, instructions to enter information and click submit, a text field for Customer Name (Ex: Tyler County, MI), a dropdown for Select type of environment, and Save and Submit buttons.

- 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:

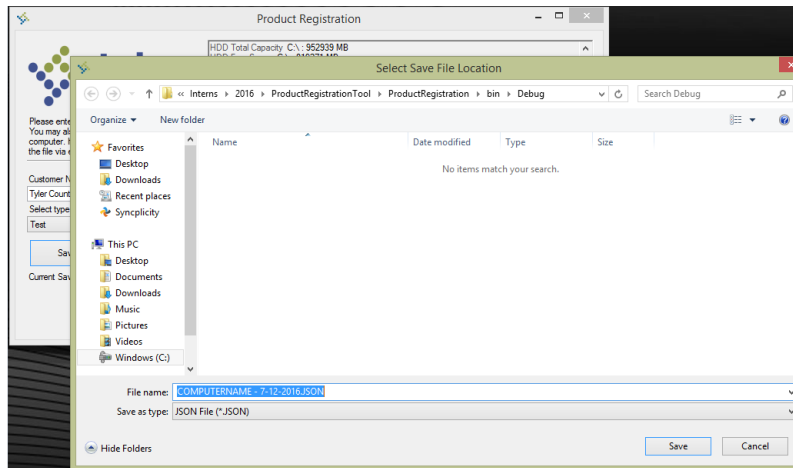


The Product Registration window shows a success message: "Success: OK". A small dialog box in the center says "Data successfully submitted." with an OK button.

- 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.

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