Community Development 2017.1 System Administrator's Guide

new world ERP – Community Development

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Contents

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INTRODUCTION

Welcome to the new world ERP Community Development 2017.1 System Administrator's Guide, written to guide administrators who are responsible for maintaining the Community Development system. This guide does not contain instructions for installing Community Development; those instructions are contained in a separate installation guide.

NOTIFICATION TEMPLATES

The following three inspection email notification templates are installed with the New World Community Development software: *NotificationTemplate_Nws.html*, *NotificationTemplate_Tyler1.html* and *NotificationTemplate_Tyler2.html*. Use these templates to design automated email notifications regarding inspection events, such as schedulings, cancellations and completions.

These templates are installed in the following location:

\New World Systems\Logos.Net\Services\Notification Service

This location will contain a fourth template, *NotificationTemplate.html*. If it does not already exist, it will be created when the notification service starts. If the template does not exist when the notification starts, *NotificationTemplate_Tyler2.html* will be copied.

If you want to change the look of the template, replace the *NotificationTempalte.html* with your own version by copying one of the other templates or making your own.

The following two logos also are installed with the software: *NotificationLogo_Nws.jpg* and *NotificationLogo_Tyler.jpg*.

If it does not already exist, a third logo, *NotificationLogo.jpg*, will be created when the notification service starts. You may replace the logo with your own the same way you update the template.

Sample images of the notification templates are shown below:

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1. **Tyler1**

   Logo: *NotificationLogo_Tyler.jpg*

   Template: *NotificationTemplate_Tyler1.html*
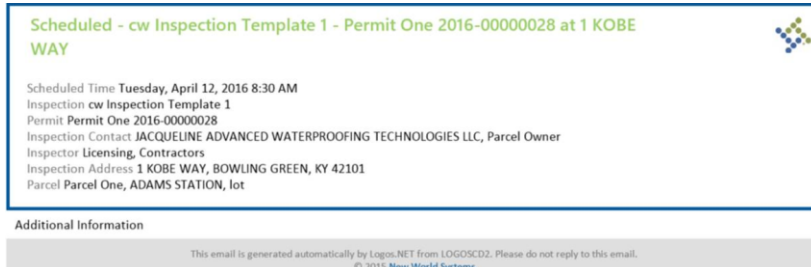
2. **Tyler2** (default template)

   Logo: *NotificationLogo_Tyler.jpg*

   Template: *NotificationTemplate_Tyler2.html*

3. **New World Systems**

   Logo: *NotificationLogo_Nws.jpg*

   Template: *NotificationTemplate_Nws.html*

Each template lets you modify the colors and logos of email notifications.

Templates are included with the installation and copied to the appropriate folder.

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EDITING INSPECTION NOTIFICATION TEMPLATES AND LOGOS

If you would prefer to use a template or logo other than the default one installed with the New World Community Development software, or if you would prefer to create your own template or logo, follow these steps:

1. Open the Windows Services on the application server.

2. Stop the New World Logos Notification Service.

3. Navigate to **..\New World Systems\Logos.Net\Services\Notification Service**. All of the files (templates and logos) are available at this location.

   Note: Files in use should ALWAYS be named as *NotificationLogo.jpg* and *NotificationTemplate.html*.

4. Copy the template or logo file you want to use to the appropriate file name shown in the note above, or create your own template and logo.

5. Restart the New World Logos Notification Service.

SEARCH INDEX STATUS

The Search Index Status page tells you when the inspection search data was refreshed last, when the next refresh will occur and whether a refresh is running currently:

Search Index Status

CD

Last Start Date	02/24/2016 6:48:58 AM
Last Complete Date	02/24/2016 6:52:22 AM
Next Start Date	02/25/2016 5:00:00 AM
Currently Running	No

[Refresh Index] [Purge Index]

Here is the link to the Search Index Status page: http://SERVERNAME/Logos/Suite/SearchIndex/Status. Replace *SERVERNAME* with the name of the server where your ERP application server is installed.

The refresh is set to run automatically at the same time each day. To start the refresh manually, click the **Refresh Index** button.

Only use the **Purge Index** button in the unlikely event the index becomes corrupted. After using this function, you will need to refresh the index.

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CONFIGURING A CD SEARCH INDEX RESTART TASK

The following steps show you how to create a restart task for the Search Index in the event one is needed:

1. On the Application Server, type **Task Scheduler** in the Windows Search to load the Task Scheduler.

2. Create a scheduler task to restart the Search Index and name it something such as **CD Search Index Restart**:

    a. Go to the **Actions** tab and click **New**.

    b. Add Stop Service Action:

        i. Program/Script: **NET**

        ii. Add Arguments (optional): **STOP "nwLogosSearchIndex"**

        iii. Click **OK** to save the action.
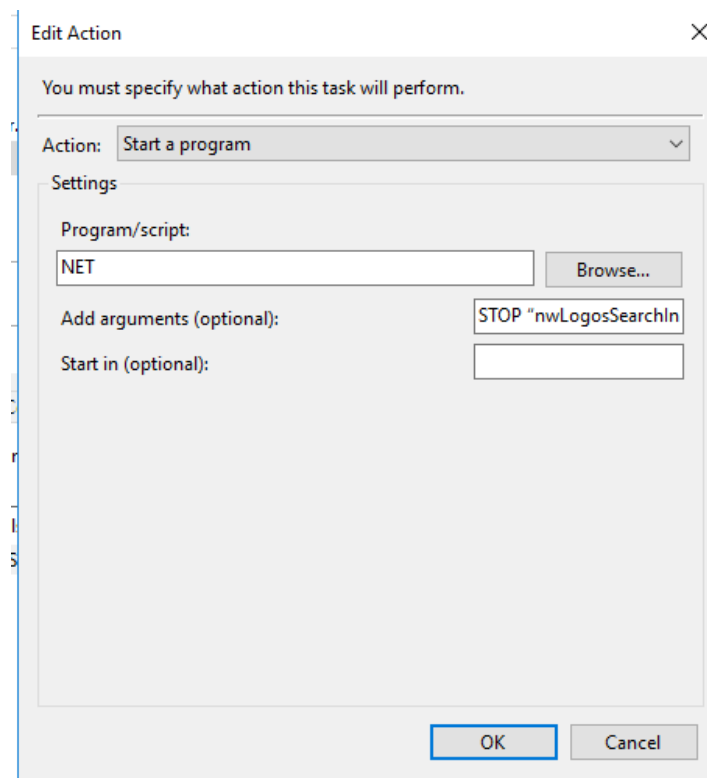
    c. Add Start Service action:

        i. Program/Script: **NET**

        ii. Add Arguments (optional): **START "nwLogosSearchIndex"**

        iii. Click **OK** to save the action.
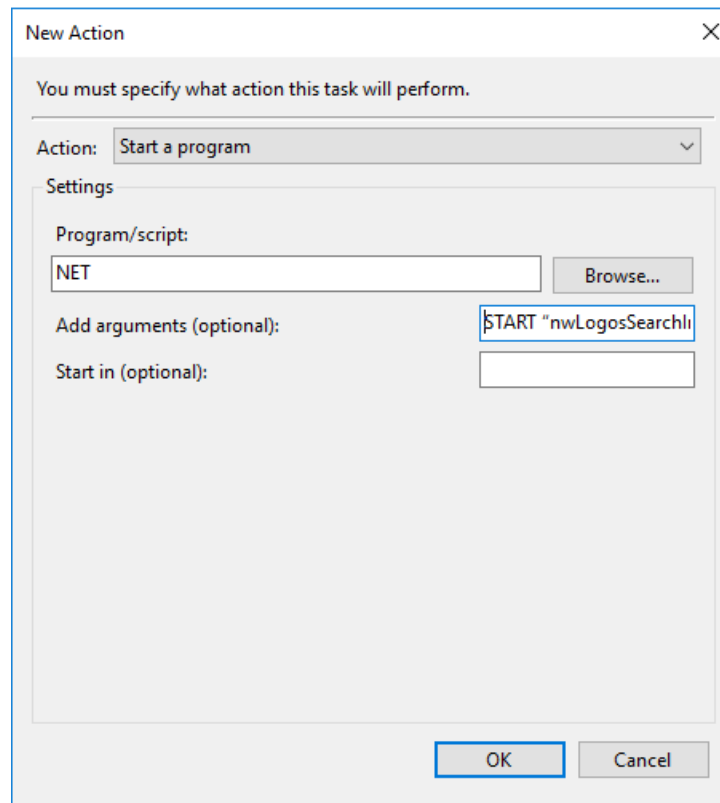
3. Make sure the sequence is correct and the stop action precedes the start action:

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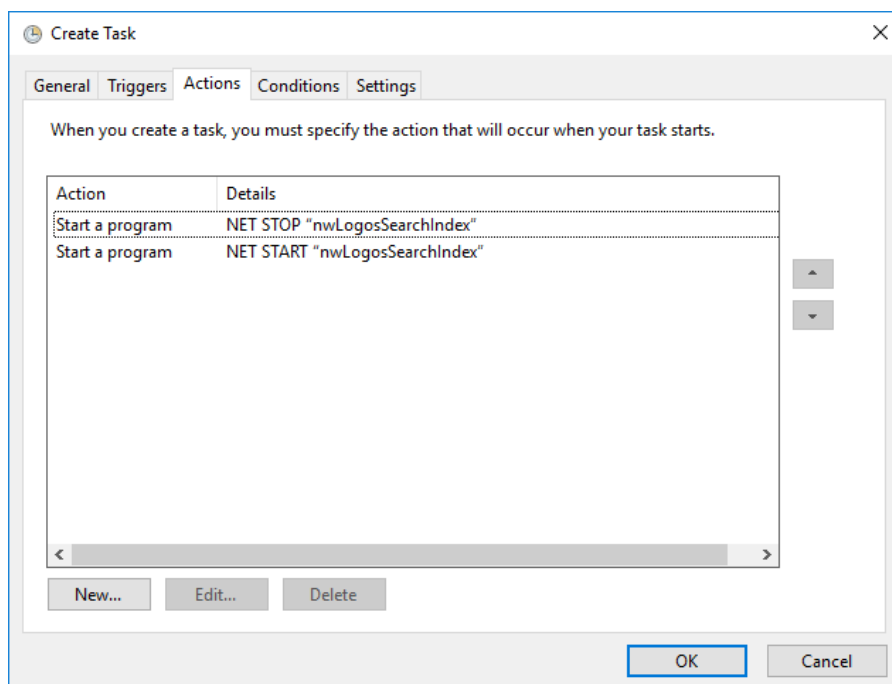
4. Navigate to the **Triggers** tab:

    a. Click **New**.

    b. Add a trigger for **Daily at 1:50 AM**.

    c. Click **OK**.

5. Update the indexing time from 5:00 AM to 2:00 AM:

    a. Go to this specified location: {InstallDirectory}\New World Systems\Logos.Net\CD\SearchIndex

    b. Copy a backup of the **CD.SearchIndex.exe.config** file to another directory.

    c. Edit **CD.SearchIndex.exe.config** file and set the following in the <indexConfig> tag:
        <schedule startTime="02:00"/>

```
<indexConfig>
        <indexer searchUrl="http://localhost:9200" removeIndicesOnStartup="false" runIndexerOnStartup="false" indexUpdatePortNumber="13866"/>
        <schedule startTime="02:00"/>
        <debug verboseRawQueries="false"/>
</indexConfig>
```

    d. Save the file.

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CD MIGRATION TOOL

The migration tool only needs to be run on databases that have not been upgraded to the myCommunity version of the software; for example, customers running 9.5 C or earlier *C* releases do not need to run the tool. To expedite the work you have to do on the morning of going live, this tool also helps you copy the data configured in the test environment to the live environment.

Notes:

- Before migrating the database, install release 2017.1.

- You should be using a current backup of the live DB on the test environment when you upgrade.

The CD Migration Tool contains three tabs: **Migration**, **Copy Data** and **Search Index**. Each tab is described below:

MIGRATION TAB

In the following steps, a DB will be selected for migration, a validation process will ensure the same migration has not been run on the selected DB, the migration will be run, and the results of the migration will be displayed.

1. In the CD Installer folder, the **CD Migration and Copy Function** folder contains the migration tool. You need write access to this folder and need to execute the migration from the application server. We suggest you copy this folder to the local hard drive of your application server.

2. Open the **CD Migration and Copy Function** folder:
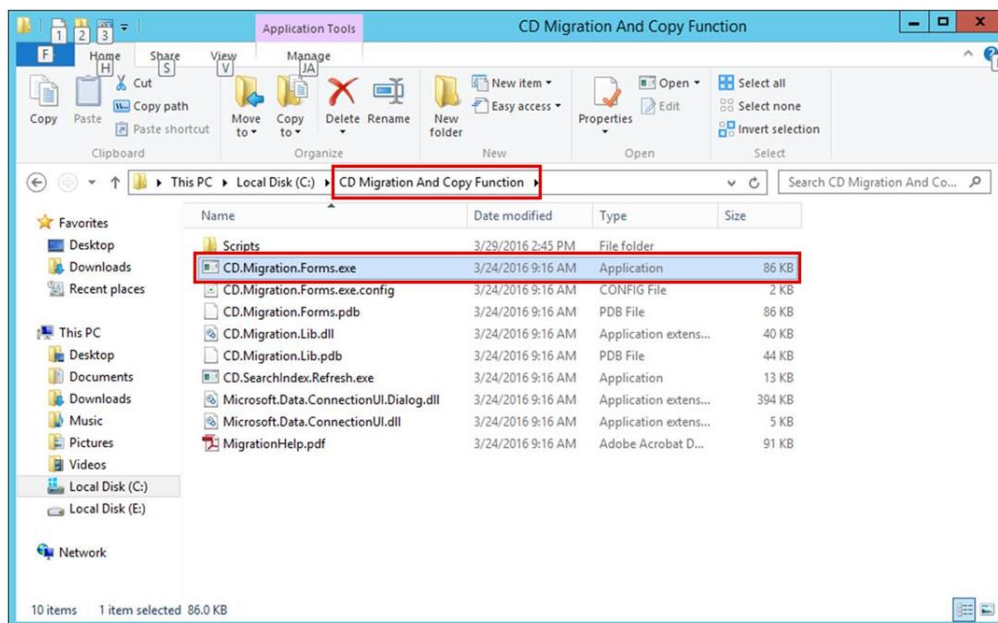
3. Double-click the *CD.Migration.Forms.exe* file. The CD Migration Tool will open:

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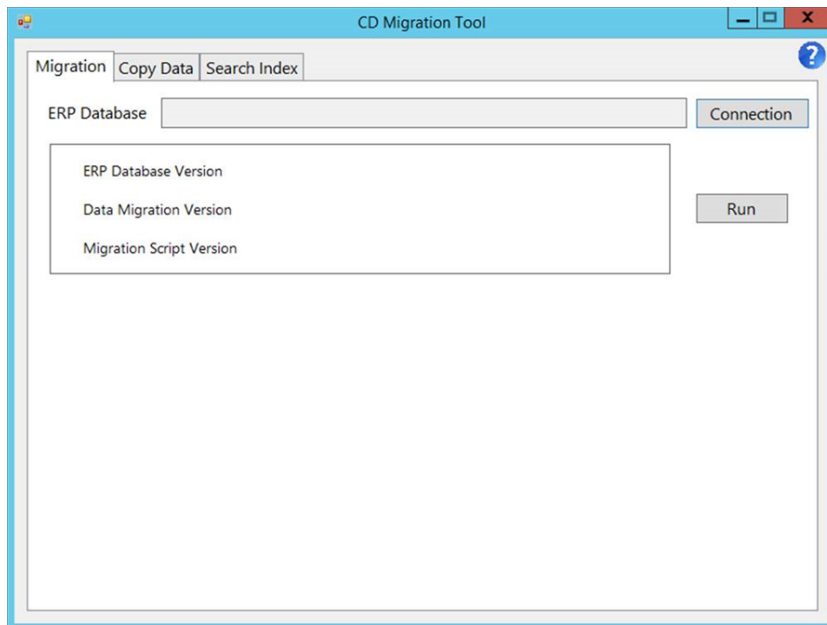
4. Click the **Connection** button next to the *ERP Database* field. The Connection Properties dialog will open:

5. Fill in the *Server Name*, *Username*, *Password* and *Database Name*.

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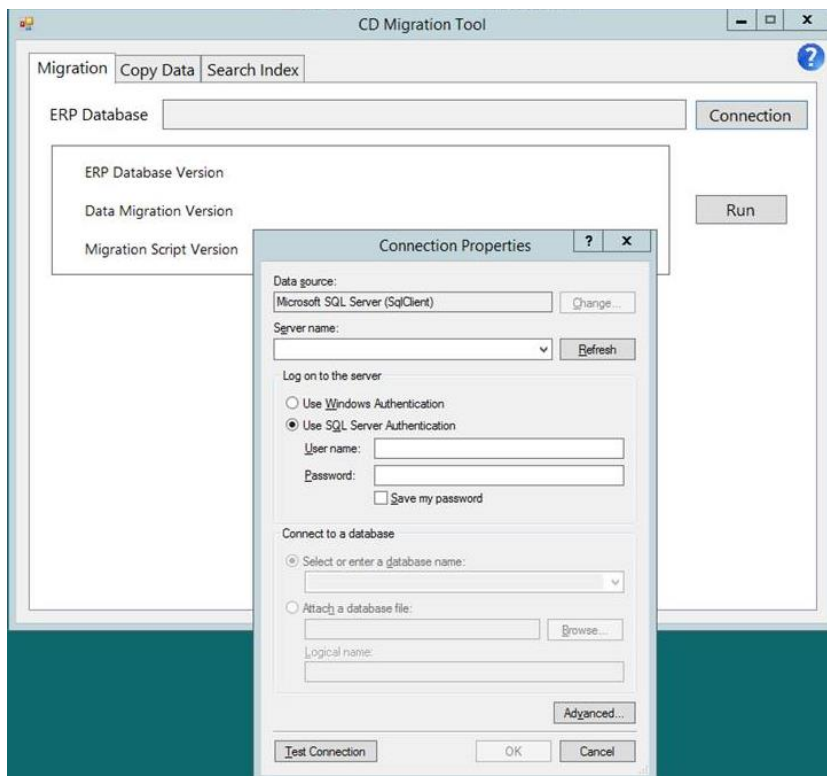
6. Click **OK**. The migration version of the SQL script is checked in the background and shown on the screen. The version details for the previously connected database (DB), if any, also are shown:
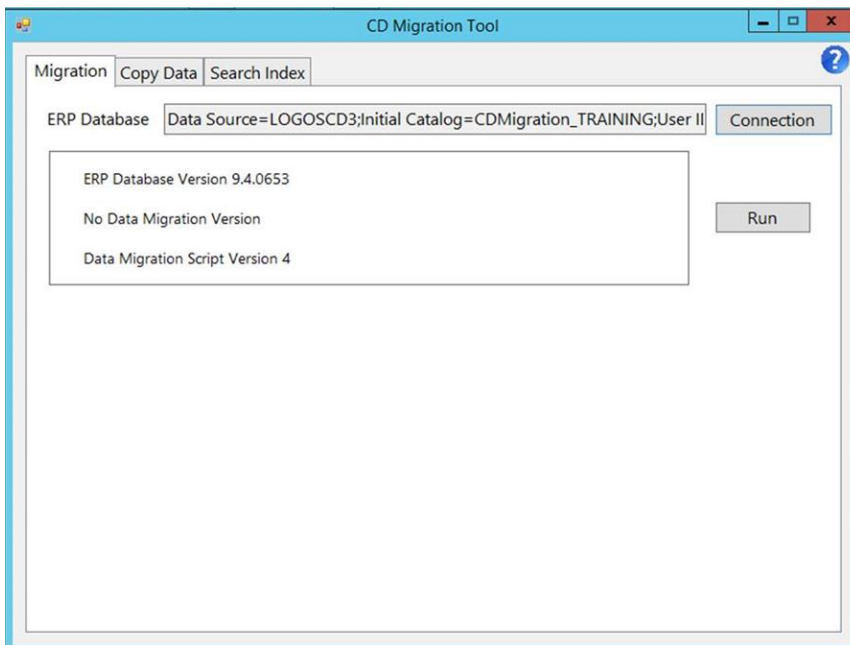

7. To run the migration, click the **Run** button. If a migration has not been run previously (as shown in the image in step 3), the migration will run without error or warning. If the migration script version is equal to or less than the migration version, as shown in the images below, an Error dialog will display:
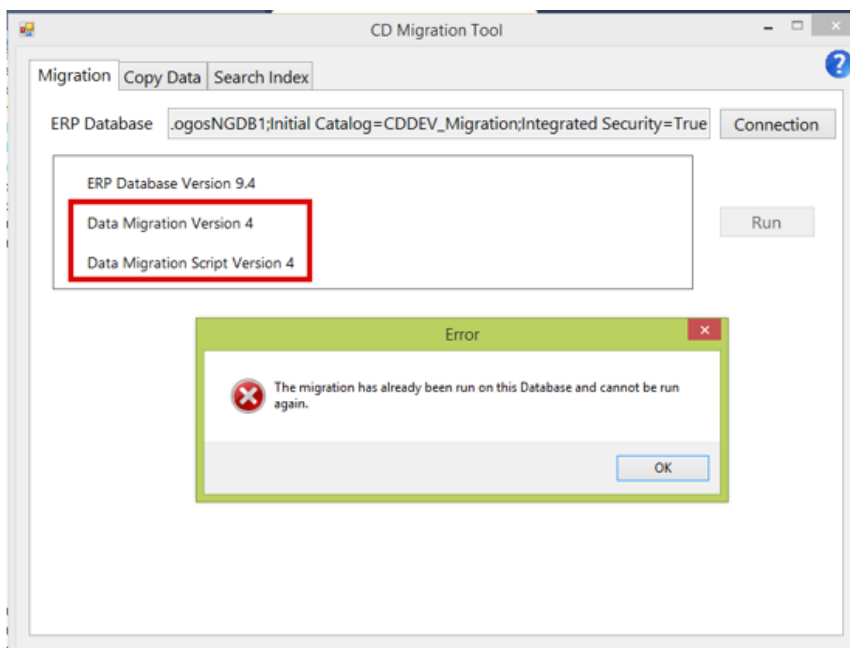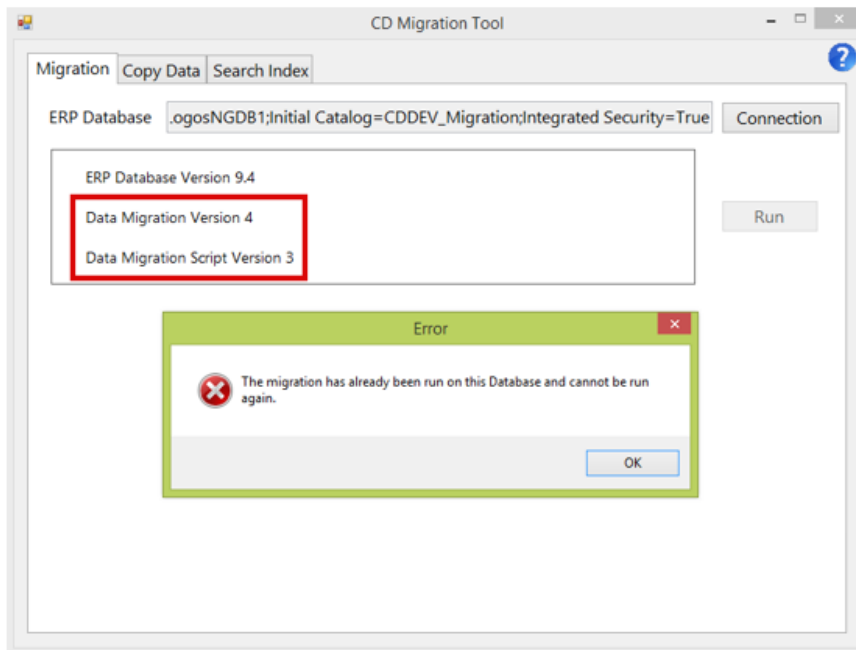
If the version of the migration script to be run is greater than the version of the migration that was run previously over the selected DB, a Confirmation dialog will display to ask whether you want to continue:
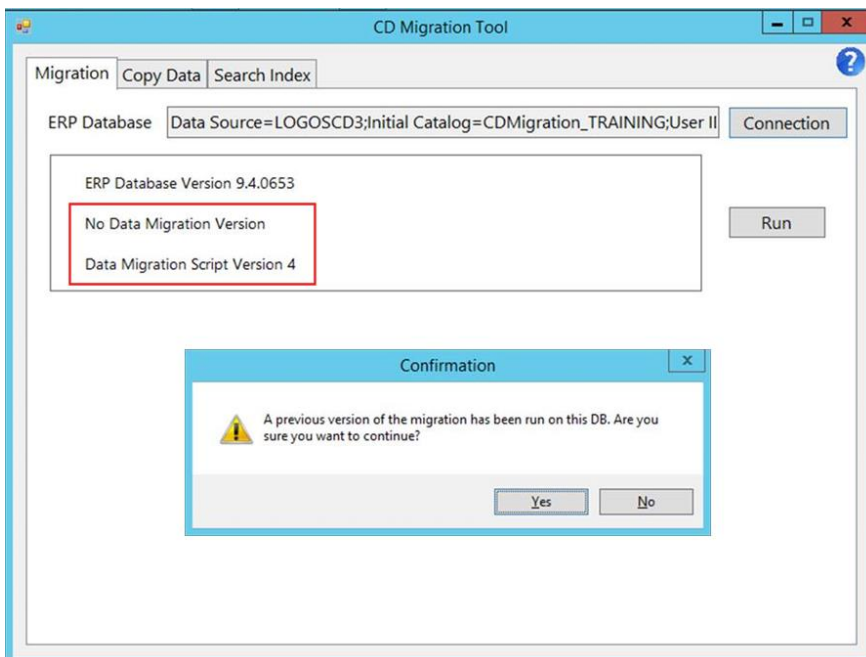
8. Click **Yes**. An Information dialog will display to tell you when the migration has completed:

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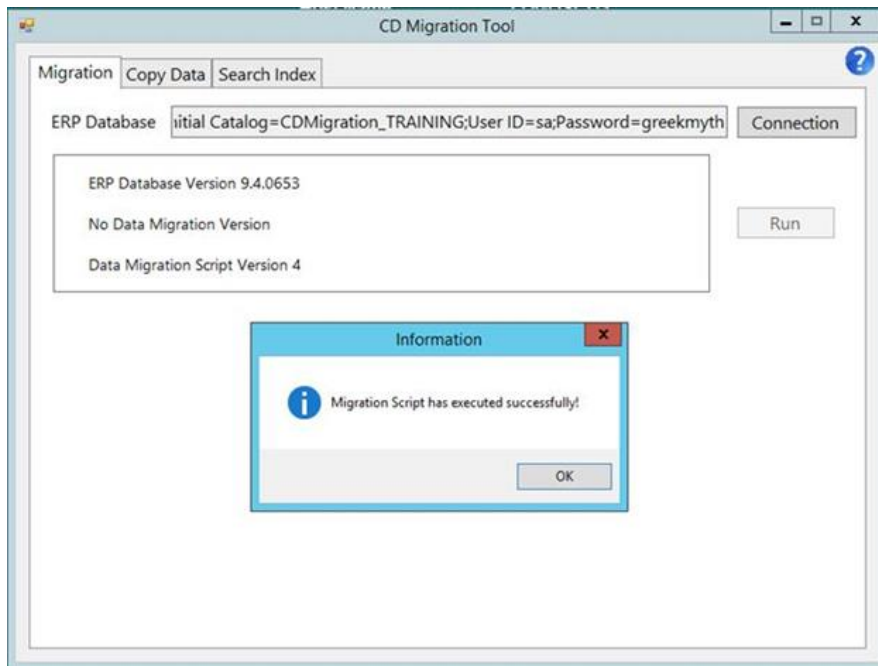
9. If any errors previously not mentioned in this guide occur, please contact Tyler support and do not begin using Community Development until a successful migration has been run. Any data entered in the system prior to a successful migration may be lost.

10. Click **OK**.

11. Review the results of the migration in the summary table, such as the one below:

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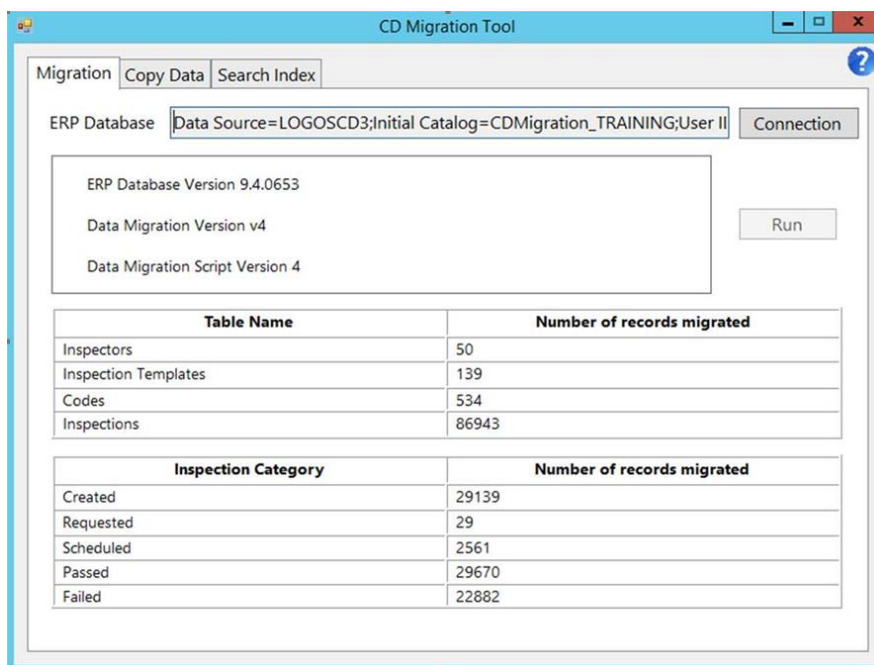
12. To review detailed results, including errors and warnings, open the *MigrationLog.txt* file, located in the CD Migration and Copy Function folder (shown in step 2):
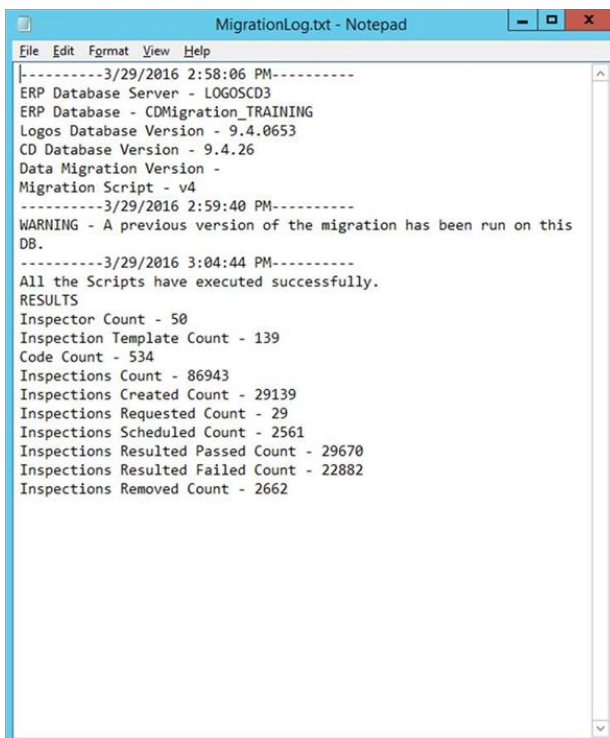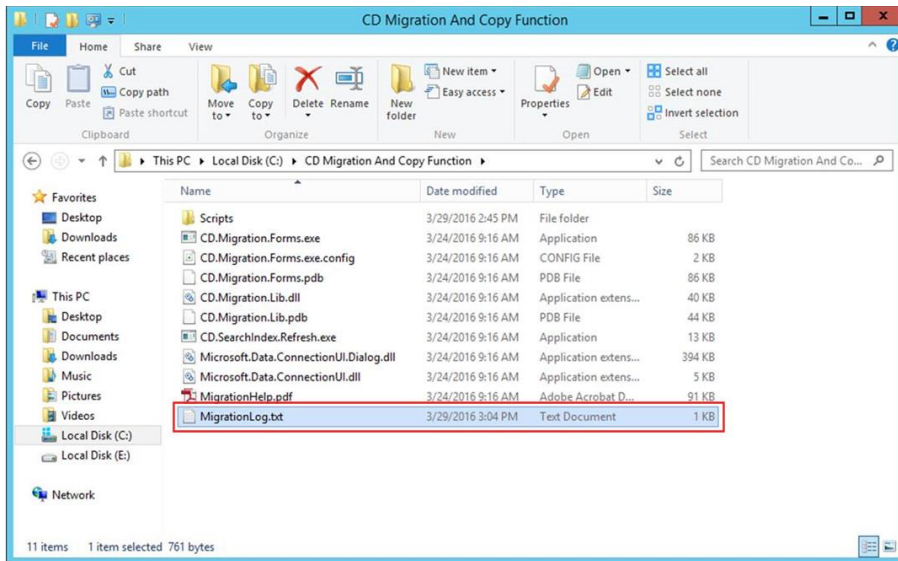
COPY DATA TAB

The **Copy Data** tab lets you copy data from the test environment to the live environment, saving you the effort of manually entering the data in the live environment after the migration.

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Typically, you will configure and learn in a test environment for one to four weeks before going live. When you go live, back up the live DB, then run the new world ERP installation, followed by the Community Development installation and the migration. After the migration, use the copy step to accelerate your move to live processing.

Data that already exists is modified; otherwise, it is added.

The inspector user assignments data only updates the relationships between the inspector and the new world ERP user/ID associated with the inspector profile; it does not change any other data on the inspector, nor does it add inspectors that may be in the test but not in the live environment.

Notes:

- Test and live DBs must be hosted on the same server for the copy function; therefore, if the test environment uses a different DB server, make a backup of the test DB and restore it on the live server

- You should be using a current backup of the live DB on the test environment when you upgrade.

- You should not change the maintenance data in the live environment in the time between running 9.5 C on your test environment and going live on 9.5 C. Examples of maintenance data include inspectors, inspection types, inspection tasks and codes.

The following steps show you how to use the CD Migration Tool to copy migrated data from the test environment to the live environment:

1. Click the **Copy Data** tab on the CD Migration Tool. This tab contains fields for connecting to the test and live databases and a table of the data types from which records will be copied:

2. Click the **Connection** button next to the *ERP Test Database* field. The Connection Properties dialog will open.

3. Fill in the *Server Name*, *Username*, *Password* and *Database Name*.

4. Click **OK**.

5. Click the **Connection** button next to the *ERP Live Database* field. The Connection Properties dialog will open.

6. Fill in the *Server Name*, *Username*, *Password* and *Database Name*.

7. Click **OK**. The table will populate with the number of new and changed records for each data type:

8. To review the details of new and changed records for a data type, click the **Review** button in the corresponding row:

9. When you have reviewed the data and are ready to copy, select the check boxes corresponding with the data types to be copied:

Note: If a new compliance item is tied to a new trade, the attempt to copy compliance items without copying trades will cause an error. The same rule applies to the copying of compliance items that are tied to inspection templates.

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10. To run the copy, click the **Copy Data from Test to Live** button.

11. When the copy has completed, a Copy Data Results pop-up will open, showing the old and new records for each data type:

12. After the copy has been run, the *New* and *Changed* columns on the **Copy Data** tab should show zeros (0):

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13. To review detailed results, open the *MigrationLog.txt* file, located in the CD Migration and Copy Function folder:

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SEARCH INDEX TAB

After running the migration or the copy data function, use the **Search Index** tab to restart the index service. This action will speed up searches in updated inspections.

1. Click the **Search Index** tab on the CD Migration Tool:
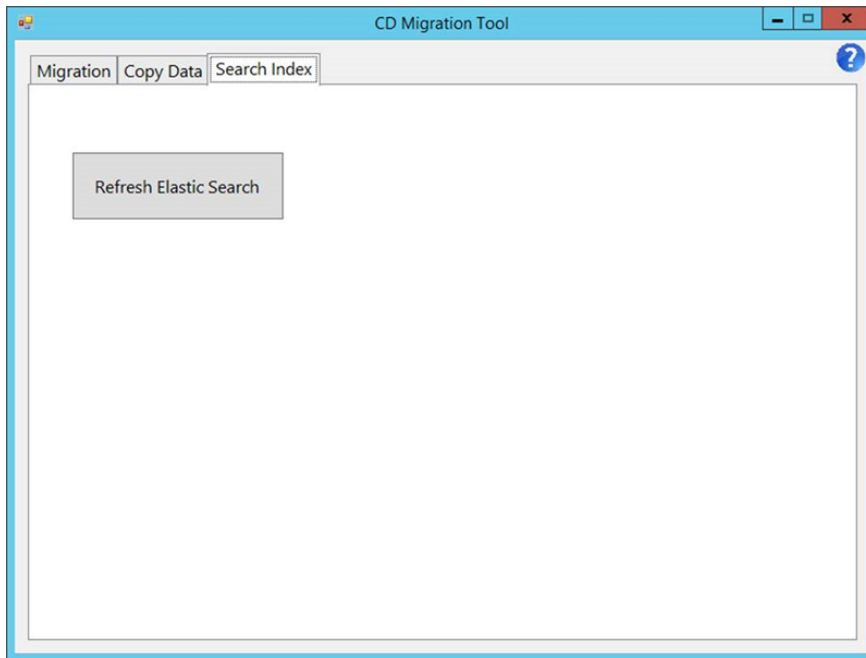
2. Click the **Refresh Elastic Search** button. When the index service has been restarted, a message will display, telling you the elastic search has been refreshed:
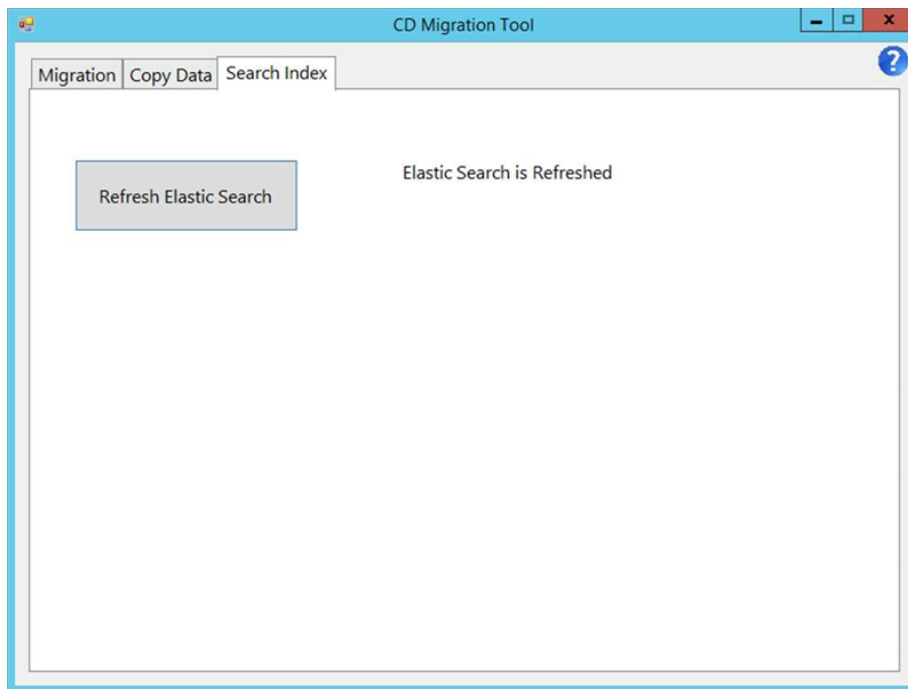
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3. To review detailed results, open the MigrationLog.*txt* file, located in the **CD Migration and Copy Function** folder:
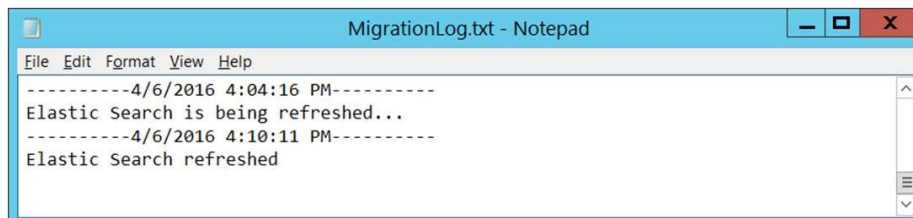
MYINSPECTIONS LOGIN TEST PAGE

In case you do not have access to an iPad or the mobile services are not outside the firewall, a myInspections Login Test page is installed with Community Development and myInspections to let you test whether myInspections has been installed and configured correctly.

The link to this page is *http://(server-name)/CD.WebAPI.Inspections/logos/myinspectionstest/loginpage*.

For server-name, use the name of the myCommunity server.

When this page appears, type an inspector's *Username* and *Password*, and click the **Login** button. The myInspections log in service will be called. If the call succeeds, a message will appear in green, telling you the call was successful and showing the number of inspections the inspector has scheduled for today, as shown below:

myInspections Login Test

Username	twebb
Password	

Login

Success! This inspector has 0 inspection(s) today.

If the call fails due to an invalid user name or password, an error message such as the following will appear in red, telling you the installation was unsuccessful:

myInspections Login Test

Username	twebb
Password	

Login

{"AuthToken":"","UserId":"","InspectorId":"","FirstName":"","LastName":"","ConfigVersion":"","ErrorMessage":"\"Invalid username/password. Please try again.\""}

A call to the log in service also may fail due to a user profile that has not been assigned the role of inspector or an inspector who is not licensed.

STOP WORK MIGRATION

A Stop Work feature was introduced in release 9.5 C and includes new Maintenance pages and modified pages related to permits, inspections and parcels. The release also included a migration of existing data and the ability to preview the results of the migration before it actually happens during the installation of 9.5 C.

To preview the results of the anticipated migration, an administrator needs to execute the script ***StopWorkMigrationResult.sql*** in Microsoft SQL Server Management Studio (SSMS) while connected to an instance of the new world ERP database. The script may be found in the *\CDInstaller\PreDeployment* folder of the 9.5 C deployment branch.

When the script is executed, it adds two new stored procedures to the database: *dbo.StopWorkMigrationPermitResult* and *dbo.StopWorkMigrationParcelResult.*

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Note: If you are upgrading from release 9.5 C, *dbo.StopWorkMigrationPermitResult* will not apply. The *dbo.StopWorkMigrationParcelResult* stored procedure will apply only if you added parcel messages with restrictions using the mass add feature (Community Development > Parcel Management > Parcel Messages Mass Add) in release 9.5 C. The messages will be migrated as stop works.

To execute the stored procedures, put the command in SSMS connected to the database:

Exec dbo.StopWorkMigrationPermitResult

Exec dbo.StopWorkMigrationParcelResult

Below is an example of the first command execution result:

PermitTypeCo...	PermitTypeDescription	PermitNumber	EventDate	EventDateType	EventNarrative	UserName	ChangedDate	PermitID
BR	Building Residential	2010-00000670	09/17/2010	Active Stop Work	GLENN POSTING STOP WORK DUE TO INSUFFICIENT FOO...	Troy PUBLIC LIBRARY	2010-09-17 14:27:53.623	399
BC	Building Commercial	2011-00000027	06/24/2011	Active Stop Work	NO COO UNTIL ATMOAS RELEASES.	Troy PUBLIC LIBRARY	2011-07-19 13:25:12.387	1086
BC	Building Commercial	2014-00000920	08/18/2016	Active Stop Work	DAN NEW COMM BLDG, THE STRATFORD	NWS	2016-08-18 10:59:59.750	7641
BC	Building Commercial	2015-00001236	09/09/2015	Active Stop Work	ALTER INT, THE JUICE STORE	Troy MACHINE & WELDI	2015-09-09 12:30:57.443	9808

PermitTypeCo...	PermitTypeDescription	PermitNumber	InitiatedDate	InitiatedUser	Warn Only	InitiateComment	RemovedDate	RemovedUser	RemoveComment	PermitID
BR	Building Residential	2010-00000670	09/17/2010	Troy PUBLIC LIBRARY	No	GLENN POSTING STOP WORK DUE TO INSUFFICIENT FOO...	NULL	NULL	NULL	399
BC	Building Commercial	2011-00000027	06/24/2011	Troy PUBLIC LIBRARY	No	NO COO UNTIL ATMOAS RELEASES.	NULL	NULL	NULL	1086
BC	Building Commercial	2014-00000920	08/18/2016	NWS	No	DAN NEW COMM BLDG, THE STRATFORD	NULL	NULL	NULL	7641
BC	Building Commercial	2015-00001236	09/09/2015	Troy MACHINE & WELDI	No	ALTER INT, THE JUICE STORE	NULL	NULL	NULL	9808

The top grid presents existing data for permits with active stop work events, and the bottom grid shows how these permits will have the data migrated to the new schema: historical and current events with the users, dates and comments, and all of the data will be migrated as stop work blocks.

Below is an example of the result of the second command:

Jurisdiction	ParcelNumber	CreateDate	EnteredUser	EndDate	ChangedUser	RestrictionDescription	RestrictionComments	ParcelPermitRestrict...	ParcelProjectRestrict...	ParcelLicenseRestric...	ParcelID
Holly Springs Town Limits	0638-66-6016	09/15/2009	Elizabeth Goodson	11/03/2009	Sandra Auer	No Building Permits - Erosion Control Device/No...	Check with Mike Dupree for status of this lot.	Yes	No	No	53
Holly Springs Town Limits	0638-66-6113	09/15/2009	Elizabeth Goodson	11/03/2009	Sandra Auer	No Building Permits - Erosion Control Device/No...	Contact Mike Dupree for status of this lot.	Yes	No	No	54
Holly Springs Town Limits	0638-72-9410	04/12/2012	Sara Emig	12/31/9999	Sara Emig	No Building Permits - See Comments	Residential lot erosion control plan & land distuba...	Yes	No	No	126
Holly Springs Town Limits	0638-72-9410	04/12/2012	Sara Emig	12/31/9999	Sara Emig	No Building Permits - See Comments	Tree Protection Meeting required with Eng (HVK),...	Yes	No	No	126
Holly Springs Town Limits	0639-66-6911	09/05/2013	Sara Emig	12/31/9999	Sara Emig	HOLD CO - ENG MESSAGE	Permanent storm drain structure on lot. Verify as ...	No	Yes	No	866
Holly Springs Town Limits	0639-67-3131	09/20/2013	Jennifer Bullock	12/31/9999	Jennifer Bullock	HOLD CO - Additional Inspection Required at CO	Hold CO per ZP. Env Area Stabilization	No	Yes	No	877
Holly Springs Town Limits	0639-68-3387	10/23/2015	Sara Emig	12/31/9999	Sara Emig	No Building Permits - See Comments	No bldg permit due to 75% build-out without acce...	Yes	No	No	946
Holly Springs Town Limits	0639-76-1658	07/03/2013	Sara Emig	12/31/9999	Sara Emig	Hold CO - EROSION CONTROL DEVICES	Hold CO for stormwater device on lot per DS.	No	Yes	No	995
Holly Springs Town Limits	0639-76-2733	09/12/2013	Sara Emig	12/31/9999	Sara Emig	HOLD CO - ENG MESSAGE	DI to verify FES and dissipator are suitable at CO ...	No	Yes	No	1001
Holly Springs Town Limits	0639-76-3729	09/12/2013	Sara Emig	12/31/9999	Sara Emig	HOLD CO - ENG MESSAGE	DI to verify FES and dissipator are suitable at CO ...	No	Yes	No	1004
Holly Springs Town Limits	0639-83-7172	12/23/2015	Connie Zurek	12/31/9999	Connie Zurek	P&Z Hold	P&Z to review all permits / all new const to req SE...	Yes	No	No	1031
Holly Springs Town Limits	0639-85-5678	09/24/2014	Sara Emig	12/31/9999	Sara Emig	No Building Permits - See Comments	No bldg permits due 75% build-out rule per DS let...	Yes	No	No	1033

Jurisdiction	ParcelNumber	InitiatedD...	InitiatedUser	RemovedD...	RemovedUser	Warn O...	InitiateComment	RemoveComm...	ParcelID
Holly Springs Town Limits	0638-66-6016	09/15/2009	Elizabeth Goodson	11/03/2009	Elizabeth Goodson	Yes	No Building Permits - Erosion Control Device/Not in Compliance - Check with Mike Dupree for status of this lot.		53
Holly Springs Town Limits	0638-66-6113	09/15/2009	Elizabeth Goodson	11/03/2009	Elizabeth Goodson	Yes	No Building Permits - Erosion Control Device/Not in Compliance - Contact Mike Dupree for status of this lot.		54
Holly Springs Town Limits	0638-72-9410	04/12/2012	Sara Emig	NULL	NULL	Yes	No Building Permits - See Comments - Residential lot erosion control plan & land disturbance permit needed per HVK ...	NULL	126
Holly Springs Town Limits	0639-66-6911	09/05/2013	Sara Emig	NULL	NULL	Yes	HOLD CO - ENG MESSAGE - Permanent storm drain structure on lot. Verify as built for storm drain. per DS	NULL	866
Holly Springs Town Limits	0639-67-3131	09/20/2013	Jennifer Bullock	NULL	NULL	Yes	HOLD CO - Additional Inspection Required at CO - Hold CO per ZP. Env Area Stabilization	NULL	877
Holly Springs Town Limits	0639-68-3387	10/23/2015	Sara Emig	NULL	NULL	Yes	No Building Permits - See Comments - No bldg permit due to 75% build-out without acceptance per DS/RLC.	NULL	946
Holly Springs Town Limits	0639-76-1658	07/03/2013	Sara Emig	NULL	NULL	Yes	Hold CO - EROSION CONTROL DEVICES - Hold CO for stormwater device on lot per DS.	NULL	995
Holly Springs Town Limits	0639-76-2733	09/12/2013	Sara Emig	NULL	NULL	Yes	HOLD CO - ENG MESSAGE - DI to verify FES and dissipator are suitable at CO per DS/ZAP	NULL	1001
Holly Springs Town Limits	0639-76-3729	09/12/2013	Sara Emig	NULL	NULL	Yes	HOLD CO - ENG MESSAGE - DI to verify FES and dissipator are suitable at CO per DS/ZAP	NULL	1004
Holly Springs Town Limits	0639-83-7172	12/23/2015	Connie Zurek	NULL	NULL	Yes	P&Z Hold - P&Z to review all permits / all new const to req SEU permit	NULL	1031
Holly Springs Town Limits	0639-85-5678	09/24/2014	Sara Emig	NULL	NULL	Yes	No Building Permits - See Comments - No bldg permits due 75% build-out rule per DS letter and memo both dated 09/...	NULL	1033

Parcel messages with restrictions (permits, projects and businesses) are the source of new stop work functionality. Historical and current messages will be migrated to the stop work tables.

For the historical entries, a pair of entries, the initiated one and the new one, will be created. For all active parcel messages only the initiated stop work will be created.

The data to be migrated will be the user who initiated or removed the stop work, the date it was initiated or the date the message expired, the parcel message as comments and the type of stop work, block or warning.

Starting with release 9.5 C, parcel messages with one or two of three restrictions checked were migrated as stop work warnings, and parcel messages with all three restrictions checked were migrated as stop work blocks. With release 2017.1, the following adjustment will be made to previously and currently

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migrated data: Parcel messages with permit restrictions checked, regardless of whether any other restrictions also are checked, will be migrated as stop work blocks.

The comment message will be a combination of the existing restriction, description and comment.

INSPECTION TYPE MIGRATION

Prior to the C release of Community Development, each inspection type was limited to a specific parent type, such as a permit, case or license.

Although inspection templates in the current Community Development application cannot be tied to specific parent types, inspection types that are migrated will be available as templates only for the same parent types to which they were tied originally; for example, all migrated permit inspection types will only be available to be assigned to inspections in Permit Service.

RELEASE NOTES

Following are descriptions of the Community Development warranty items that are part of the 2017.1 release of new world ERP:

ePermits

- An error occurred if a contractor attempted to drill into the details of an inspection.

eLicensing

- Delinquent fees paid from eLicensing were incorrect.

Inspections

- Inspection Confirmation letters could not be printed.

- myInspections pictures were saving multiple times to an inspection compliance item.

- The re-inspection process was not allowing an unassigned inspector.

- Inspection names on permits were duplicating in some cases.

- On the Code Enforcement form letter, the Failed Compliance Items grid has been enhanced to include the options of Book/Year, Code, Identification, Short Description and (Long) Description.

- Printing the mail merge Inspector's Worksheet template resulted in an error in myReports.

- The inspection scheduler in new world ERP was showing the inspection and the Outlook appointment for the inspection.

- Each Stop Work tab in the Stop Work Edit dialog needed its own user permission check.

- Inspections that were not attached to parcels were not visible in the Inspection Search/List.

- The Schedule Inspection dialog was not working for inspectors scheduling their own inspections.

- The top pane filters on the Inspection Scheduler page did not save.

- The left pane filters on the Inspection Scheduler page did not save.

Licensing

- Batch license printing was not referencing the license annual renewal ID, so all amounts paid were displaying as zero.

- Following an upgrade to release 9.5 C, attempts to add license type/number receipts caused errors.

- A business could not be inactivated.

- The license renewal payment from an undesignated balance was incorrect.

- Printing delinquent notices resulted in the following error: "Item cannot be found in the collection corresponding to the requested name or ordinal."

Parcel Management

- Selecting Unspecified as a Zoning Class when attempting to generate a Parcel Ownership Change Report resulted in data not being returned.

- The parcel number and owner name were not appearing in the Case Service tree.

- Parcel message restrictions were migrating as warnings instead of blocks.

Permits

- A permit that was reopened did not return to the correct status.

- Fees added to a template that had been used were showing on the old permit.

- Selecting the Subdivision drop-down on the Parcel Messages Mass Add page caused the page to reload and the drop-down to collapse, preventing a selection from being made.

- An error occurred during the processing of a Temporary Certificate of Completion.

- Parcel messages were not opening in Permit Service.

- If a permit was not printed during the issuing step, the printed status would not appear on the Permit Service page.

Project Planning

- Projects could be created with the same name or number.

- When a project was created, the project number was not being generated.