

## Earnie<sup>™</sup> IQ

# Upgrade Instructions

April 2021

**IRIS. Look forward** 

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### **Upgrade Instructions**

#### **Important Notes**

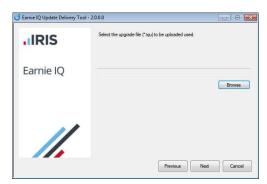
- Client and server upgrades are installed using separate processes
- There are two methods for installing the server upgrade: the Update Delivery Tool method (also known as the IQU method) and the Server Update Utility method
  - Update Delivery Tool method
    - This method can only be run from a machine that already has the server tools installed
    - This method will not set up the latest tax year example in the demo company
  - Server Update Utility method
    - This method will require restoring of database backups, therefore appropriate permissions will be required
    - This method may take longer than the IQU method
- Follow the appropriate sections below

#### Server Upgrade – Update Delivery Tool (IQU) method

- 1. Download the IQU file from the website
- 2. From the **Windows Start menu | IRIS Payrolll Solutions**, run the **Unpack Database Updates** utility

| Earnie IQ Update Delivery Tool | - 2.0.0.0  | -            |             | ×   |
|--------------------------------|--|--------------|-------------|-----|
| IRIS                           | Welcome to the Earnie IQ Update Delivery Tool.<br>Use this tool to upload database upgrade files (*.iqu) | to your data | abase servi | er. |
| Earnie IQ                      |  |              |             |     |
|                                |  |              |             |     |
| //.                            |  |              |             |     |
|                                | Previous   | Next         | Cano        | el  |

3. Click Next



- 4. Enter (or browse to) the IQU file you saved in step 1
- 5. Click **Next**. You will now see details of the updates to be applied

6. Click **Next** - the connection details will display

| IRIS      | Enter the details payroll databases | of the target SQL Server hosting the |   |
|-----------|-------------------------------------|--------------------------------------|---|
|           | Server Name:                        | L06639\aqlexpress                    | • |
| Earnie IQ |                                     | Windows Authentication               | • |
| Larrie IQ | Usemane:                            |                                      |   |
|           | Paseword:                           |                                      |   |
|           |                                     | Perform database upgrade?            |   |
| //,       |                                     |                                      |   |

The **Update Delivery Tool** will normally show your **Server Name** and **Instance Name** (if used). If the **Update Delivery Tool** has been unable to locate your server, you will need to enter your **Server Name** (and Instance Name if appropriate) e.g. SQLSERVER or SQLSERVER\PAYROLL.

If your server does not use SQL Server Authentication, from the drop-down list select either **Windows Authentication** or **Earnie IQ Authentication**.

Finally, enter the relevant **Username** and **Password** for the authentication chosen

- 7. Click Next
- 8. The database update will now run. You are kept informed of the progress of the update(s) and are finally told that the updates have been transferred to the server. Click **Exit** to finish the process



9. The Update Log text file will now be displayed. Scroll down to the last entry and check that no errors have occurred

#### Server Upgrade – Server Update Utility method

- 1. Download the **EarnielQ (Server Tools).exe** file from the website.
- 2. Run the self-extracting zip, which will begin the installation process.

| IRIS      | Welcome to the InstallShield Wizard for Earnie<br>IQ Server Tools  |
|-----------|--|
| Earnie IQ | The InstalShield <sup>®</sup> Wizard will install Earnie IQ Server<br>Tools on your computer. To continue, click Next. |
|           |  |
| //,       |  |
|           | <back next=""> Cancel</back>   |

3. Click **Next** and accept the licence agreement

- 4. Click **Next** to confirm a typical installation
- 5. Then select **Next** to start copying files
- Once the files have been copied, click Finish to launch the Server Configuration Tool. If you prefer to do this later, you can run the Server Configuration Utility from the Start Menu

| Earnie IQ Server Tools - InstallShield Wizard |  |  |
|---|--|--|
| <b>IRIS</b>                                   | Setup complete   |  |
|   | Setup has completed installing Earnie IQ Server Tools. |  |
| Earnie IQ                                     |  |  |
|   | ☑ Launch Server Configuration Tool                     |  |
|   | Click Finish to exit Earnie IQ Server Tools setup.     |  |
| //,   |  |  |
|   | < Back Finish Cancel                                   |  |

7. The Server Configuration Manager screen will be displayed

| 🚼 Earnie IQ Database Configuration Manager                          | - D X  |
|---|--|
| .IRIS Earnie IQ   | re Payroll Database Server wext 11200  |
| Server Status   | Earnie IQ Server Status<br>Use the Earnie 10 Perrol Configuration Manager to deploy, configure and upgrade Earnie 10 Perrol databases on a host  |
| Database Setup<br>Advanced Settings<br>Initialisation<br>Versioning | 52, Snor<br>Status<br>S0, Snore<br>Uarrane<br>Detaile<br>Setaile<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>Interconnent<br>In |
|   | Stat         Stap           Lagand         -           ····································  |

8. Click **Connect** and enter valid security credentials

| SQL Server Login |   | $\times$ |
|------------------|---|----------|
| Enter the name   | and security credentials for the target SQL Server: |          |
| Server name:     |   | ×        |
|                  | Windows Authentication                              |          |
| Usemame:         |   |          |
| Password:        |   |          |
|                  |   |          |
|                  | OK Ca   | incel    |
|                  |   |          |

9. Select **Database Setup** and click the **Verify** option to ensure configuration is correct

| 🎐 Earnie 1Q Database Configuration Manager - Connected to Asglexpress2014 💿 🕢 🖉 |  |                   |  |  |
|---|--|-------------------|--|--|
| IRIS Earnie IQ  |  |                   |  |  |
| Configu   | re Payroll Database Server   | Version: 1.1.20.0 |  |  |
| Connect Befresh   | Database Directories   |                   |  |  |
| Server Status   | Specify the directories to be used by SQL Server to hold your database files.<br>Files will need to be remotely  |                   |  |  |
| Ø Database Setup  | Data file directory:   |                   |  |  |
| Advanced Settings   | C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS2014\MSSQL\DATA  | 1. Browse         |  |  |
| Initialisation  | Transaction log file directory:<br>C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS2014\MSSQL\DATA       | 2. Browse         |  |  |
| Versioning  | Database backup file directory:  |                   |  |  |
|   | C\Program Filer/Microsoft SQL Server/MSSQL12.SQLEXPRESS2014/MSSQL\Backup   | 3. Browse         |  |  |
|   | Database backup file directory (remote access):  |                   |  |  |
|   | Do not copy backups to remote machine. C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS2014\MSSQL\Backup | 4. Browse         |  |  |
|   |  |                   |  |  |
|   |  |                   |  |  |
|   |  |                   |  |  |
|   |  |                   |  |  |
|   | 📔 🔳 Isoly  | Egt               |  |  |

10. Select **Versioning** to continue with the server upgrade

| ooning   | ure Payro  | ll Databas  | se Serve              | er                                | Version: 1.1.    |
|--|--|---|-----------------------|-----------------------------------|------------------|
| Connect  | Database   | Versioning  |                       |                                   |                  |
| Server Status<br>Database Setup<br>Advanced Settings | the databases<br>NOTE: databa  | to be upgraded to later versio<br>ses cannot be downgraded to | ns.                   | low. Upgrades can be added to the | library to allow |
| Initialisation                                       | Current Version Version 2:24-23. April 2020 Release (2:23-79 Patched). Released 01/07/2020. Ultorade |   |                       |                                   |                  |
|  | Version Librar<br>Location:<br>Available V   | C.\Program Files (x86)\Intex                                  | Software\Earnie IQ (S | Server Tools)\ServerCo            | Browse           |
|  | Version  | Release   | Date                  | Library File                      | ^                |
|  | 2-23-79  | April 2020 Release  | 01/07/2020            | V2-23-79 (April 2020) PayroliDB   | s zp             |
|  | 2-23-72  | April 2020 Release  | 20/03/2020            | V2-23-72 (April 2020) Payrol DB   | e zip            |
|  | 2-22-8   | Summer 2019 Release   | 11/07/2019            | V2-22-08 (Summer 2019) Payro      | IDBs zip         |
|  | 2-21-31  | April 2019 Release  | 20/02/2019            | V2-21-31 (April 2019) Payrol DB   | is zip           |
|  | 2-20-26  | April 2018 Release  | 22/02/2018            | V2-20-26 (April 2018) Payrol DB   | ls zip           |
|  | 2-19-43  | April 2017 Release  | 09/02/2017            | V2-19-43 (April 2017) Payrol DB   | is zip           |
|  | 2.13.43  |   |                       |                                   |                  |
|  | 2-18-29  | Summer 2016 Release   | 05/07/2016            | V2-18-29 (Summer 2016) Payro      | IDBs.zip         |

- 11. Click the **Upgrade** button to upgrade to the latest version (as indicated by the highlighted row in the **Available Versions** grid)
- 12. The server upgrade may take some time, as it involves copying and restoring backup files and also upgrading existing companies. Whilst the copy and restore steps are progressing you will see:

|   | Stage                       | Action    |       |
|---|-----------------------------|-----------|-------|
| 0 | Pre-Upgrade Checks          | Complete. |       |
| ۲ | Files                       | Executing |       |
| ۲ | Restoring Databases         |           |       |
| ۲ | Setting Compatibility Level |           |       |
| ۲ | Recovery Level              |           |       |
| ۲ | Configure Security          |           |       |
| ۲ | Backup Demo Database        |           |       |
| ۲ | Transfer Updates            |           |       |
| ۲ | Perform Upgrades            |           |       |
| ۲ | Remove Temporary Data       |           |       |
| ۲ | Remove Temporary Files      |           |       |
| ۲ | Post-Upgrade Checks         |           |       |
|   |                             | C         | ancel |

13. Existing companies will then be upgraded



14. The Update Log text file will now be displayed. Scroll down to the last entry and check that no errors have occurred

#### **Client Upgrade**

- 1. Download the EarnielQ (Client Only).exe file from the website
- 2. Run the self-extracting zip, which will begin the installation process.

| Earnie IQ Client Install - Inst | tallShield Wizard   | Earnie IQ Client Install - InstallShield Wizard  |
|---------------------------------|---|--|
| <b>.</b> IRIS                   | Welcome to the InstallShield Wizard for Earnie<br>IQ Client Install   | Licence Agreement<br>Please read the following important information<br>before continuing. Earnie IQ   |
| Earnie IQ                       | The InstallShield® Wizard will install Earnie IQ Client Install<br>on your computer. To continue, click Next. | Please read the following Licence Agreement. You must accept the terms of this agreement<br>before continuing with the installation.   |
|                                 |   | IRIS SOFTWARE GROUP GENERAL TERMS & CONDITIONS  ETTWEEN IIII Software Limited on the IRIS Group Company stated in an Older or inmoion ("Supplement Avolution") and IIII here stated in the IRIS Group Company stated in an Older or inmoion ("Supplement Avolution") and IIIII here stated in the IRIS Group Company stated in an Older or inmoion ("Supplement Avolution") and IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII |
|                                 |   | I accept the terms of the licence agreement     I do not accept the terms of the licence agreement InstalShield  |
|                                 | K Back Next> Cancel   | <back next=""> Cancel</back>   |

3. Click Next and accept the licence agreement



4. Choose **Next** to then select the installation type



5. Click **Next** to confirm a typical installation



- 6. Select **Next** to start copying files
- 7. Various screens will then be displayed showing the progress of the upgrade



- 8. Once the update has completed click **Finish**
- 9. Start Earnie IQ. From the **Help** Menu, select **About Earnie** and check that the version number matches the upgraded version
- 10. Repeat these steps for all other EarnielQ client machines (if more than one)

#### **Useful numbers**

| HMRC online service helpdesk  | HMRC employer helpline   |
|---|--|
| Tel:       0300 200 3600         Fax:       0844 366 7828         Email:       helpdesk@ir-efile.gov.uk | Tel:       0300 200 3200         Tel:       0300 200 3211 (new business) |

#### Contact Sales (including stationery sales)

| For IRIS Payrolls       | For Earnie Payrolls           | For IRIS Payroll Professional  |
|-------------------------|-------------------------------|--------------------------------|
| Tel: 0344 815 5656      | Tel: 0344 815 5676            | Tel: 0345 057 3708             |
| Email: sales@iris.co.uk | Email: earniesales@iris.co.uk | Email: payrollsales@iris.co.uk |

#### **Contact Support**

| Your Product                              | Phone         | E-mail                     |
|---|---------------|----------------------------|
| IRIS PAYE-Master                          | 0344 815 5661 | payroll@iris.co.uk         |
| IRIS Payroll Business                     | 0344 815 5661 | ipsupport@iris.co.uk       |
| IRIS Bureau Payroll                       | 0344 815 5661 | ipsupport@iris.co.uk       |
| IRIS GP Payroll                           | 0344 815 5681 | gpsupport@iris.co.uk       |
| IRIS GP Accounts                          | 0344 815 5681 | gpaccsupport@iris.co.uk    |
| Earnie or Earnie IQ                       | 0344 815 5671 | earniesupport@iris.co.uk   |
| IRIS Payroll Professional (formerly Star) | 01273 715300  | payroll-support@iris.co.uk |