

The instruction booklet is also included on the CD in Word and Acrobat formats, which may be easier to print. (If you want to install Acrobat reader, run **d:\acroread\setup.exe** (where **d** is the identifier of your CD drive))

You can find the instructions in

d:\docs\Existing Installations.doc for MICROSOFT WORD

or **d:\docs\Existing Installations.pdf** for ADOBE ACROBAT

Software Update Instructions

Earnie IQ

7th November 2014

NOTES: This document details the steps required to update an EXISTING copy of EARNIE IQ.

If you have uninstalled an existing version of EARNIE IQ you should follow the steps for a new installation in New Installations.doc on the CD.

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Introduction

Notes for Payroll Staff

This document contains a number of procedures designed to guide the reader through the software update process. It applies to all updates that are received including legislative updates (April and May releases) and general software updates. In most cases it is necessary to update both the SQL Server and the client PCs. We therefore recommend that the IT department or SQL Server Administrator handle the entire update process. The Payroll Manager should liaise with the software installer to determine the best time to update.

Installing Year-end Updates

The year-end release of the software (known as the April release) is normally issued sometime around February. **It is essential that this software is installed at the earliest possible opportunity.** It is NOT necessary to complete all the payrolls for the year before applying the update. If the installation is left too late, there may not be enough time to complete the year-end process before you need to run the first payrolls in the new tax year.

Performing the Year-end

The year-end process can only be started once the April release of the software has been installed. Once this has happened, you will be able to view the instructions for moving your companies into the new tax year by selecting 'Updates' from the IQ Help menu. The instructions are also contained in a file called 'EIQUpdate.doc' which can be found in the 'Docs' folder on the April release CD. This file is in Microsoft Word format but it is also available in Adobe Acrobat format (EIQUpdate.pdf).

Notes for the Software Installer

Mandatory and Optional Releases

Software installers who have no knowledge of payroll need to be aware that installation of some software releases is mandatory. This is to ensure compliance with changes to government legislation. There are normally one release a year that falls into this category: the April release. This update is received prior to the tax year-end which is an extremely busy time for most payroll departments. Usually, both the Client PCs and the SQL Server will need to be updated, resulting in a certain amount of down-time of the payroll system. It is therefore essential to liaise closely with the payroll department with regards to the timing of the installation. The notes below may help you plan.

Installation of other software releases is optional; however, the user will normally have requested the update in order to take advantage of the latest feature changes. Again, agreement should be reached on the installation timing.

When to Install

To give payroll staff plenty of time to discharge their year-end responsibilities, it is **essential that year-end legislative updates are installed as soon as they are received**. The April release is normally issued during February. Although the Payroll Manager needs to be consulted to ensure minimal disruption to the running of the department, it is important that the installation is not delayed more than is absolutely necessary. Updating the software will not affect the users' ability to continue running payrolls in the current tax year.

The timing of the installation of non-legislative releases will depend upon the nature of the update and the demands of the payroll department. The software installer should again consult with the Payroll Manager to agree a mutually convenient time.

Finding Update Information

Details of program and legislation changes are included in **EIQUpdate.doc** which can be found in the **Docs** folder on the CD. This file is in Microsoft Word format but it is also available in Adobe Acrobat format (**EIQUpdate.pdf**). For the April release of the software this file is primarily used for the payroll year-end procedures. The same information can be found on the **Help** menu under **Updates**.

Server Update

This section describes how to **update** the **server-side** components of EARNIE IQ.

The client-side update must be performed separately. (See the next section)

Pre-Update

To update the server-side of EARNIE IQ you will require the following information:

- The name of the SQL Server instance where the EARNIE IQ databases are stored
- A valid login to the SQL Server. This will either be the "sa" account and password or an administrator login to Windows on the SQL Server

It is recommended that all company databases, and the system database, are backed up prior to performing a Server update.

Methods of Updating the Server

There is now only one method of deploying the EARNIE IQ updates as the standard local server install option has been removed:

- Using the remote deployment tools

To check the remote deployment tools have been installed on a machine go to **Start / Programs / IRIS Payroll Solutions / Earnie IQ (Server Tools)** and there will be a **Server Configuration Utility** option.

Update

To Update EARNIE IQ Server (using remote deployment tools)

1. Ensure that EARNIE IQ is not running on any of the client machines
2. Log into the machine to be used to deploy. Remember to log in as a user with administrator rights to the machine hosting the SQL Server
3. Make sure the SQL Server is running
4. Insert the EARNIE IQ CD. If the install program does not begin automatically then enter **d:\Setup.bat**, (where **d** is the letter of your CD drive), at the Windows Run command line and then press ENTER
5. If you do not already have the remote deployment tools installed (or you want to perform the update from another machine):
 - a. Select **'Install Products'**, then **'Payroll and Timesheet Server'** and then **'Advanced remote deployment tools'**
 - b. Progress through the screens accepting licence terms etc to complete the installation
6. To update existing release library:

- a. Select '**Install Products**', '**Payroll and Timesheet Server**', '**Recovery and Configuration**' and then '**Update version library**'
 - b. Wait for the message indicating that the local version library has been updated and then click '**OK**'
7. To update the server:
 - a. Launch the **Server Configuration Utility** from the Windows menus **Start/Programs/IRIS Payroll Solutions/Earnie IQ (Server Tools)**
 - b. In the Configuration Manager, click '**Connect**'
 - c. Enter the server name and appropriate logon credentials then click '**OK**'
 - d. Select the '**Versioning**' section and click the '**Upgrade**' button, ensuring that the appropriate release is selected in the available versions list and confirm the upgrade

If any errors occur during the upgrade process please e-mail support@earnie.co.uk and attach the text file.

Client Update

This section describes how to **update** the **client-side** components of EARNIE IQ. The server-side update must be performed separately. (See the previous section).

Update

To Update an EARNIE IQ Client

1. We recommend closing all applications before continuing
2. Log into the PC where the EARNIE IQ client program is installed. Remember to log in as a user with administrator rights to that machine
3. Insert the EARNIE IQ CD. If the install program does not begin automatically then enter **d:\Setup.bat**, (where **d** is the letter of your CD drive), at the Windows Run command line and then press ENTER
4. Select '**Install Products**' and then '**EARNIE IQ - Client**'
5. Progress through the screens accepting licence terms etc. until you reach a screen asking what type of installation you would like to do. Choose '**Typical**'
6. You are then asked to confirm the details before the update proceeds to its conclusion

Timesheet Central Update

This section describes how to install the components required for updating an existing Timesheet Central installation. To update an installation of Timesheet Remote please see the next section.

Update

To Update Timesheet Central

1. We recommend closing all applications before continuing
2. Insert the EARNIE IQ CD. If the install program does not begin automatically then enter **d:\Setup.bat**, (where **d** is the letter of your CD drive), at the Windows Run command line and then press ENTER
3. Select '**Install Products**' and then '**Timesheet Central**'
4. Progress through the screens accepting licence terms etc. until you reach a screen asking what type of installation you would like to do. Choose '**Typical**'
5. You are then asked to confirm the details before the update proceeds to its conclusion

Timesheet Remote Update

This section describes how to install the components required for updating an existing Timesheet Remote installation. To update an installation of Timesheet Central please see the previous section.

Update

To Update Timesheet Remote

1. We recommend closing all applications before continuing
2. Insert the EARNIE IQ CD. If the install program does not begin automatically then enter **d:\Setup.bat**, (where **d** is the letter of your CD drive), at the Windows Run command line and then press ENTER
3. Select '**Install Products**' and then '**Timesheet Remote**'
4. Progress through the screens accepting licence terms etc. until you reach a screen asking what type of installation you would like to do. Choose '**Typical**'
5. You are then asked to confirm the details before the update proceeds to its conclusion