



Earnie™ IQ

Upgrade Instructions

April 2021

IRIS. Look forward

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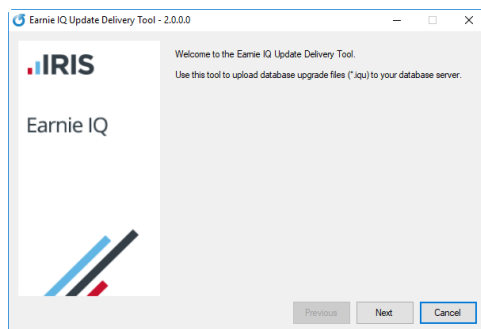
Upgrade Instructions

Important Notes

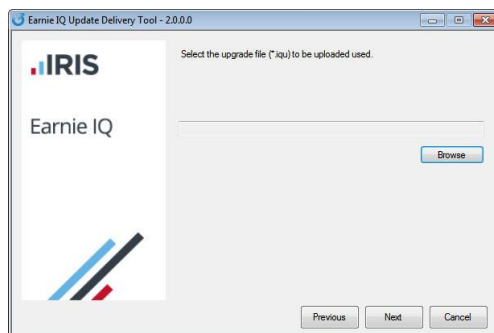
- Client and server upgrades are installed using separate processes
- There are two methods for installing the server upgrade: the **Update Delivery Tool** method (also known as the IQU method) and the **Server Update Utility** method
 - **Update Delivery Tool** method
 - This method can only be run 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 Payroll Solutions**, run the **Unpack Database Updates** utility



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

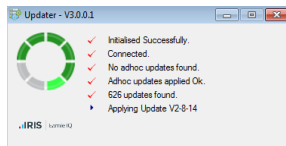


The **Update Delivery Tool** will normally show your **Server Name** and **Instance Name** (if used). If the **Update Delivery Tool** has been unable to locate your server, you will need to enter your **Server Name** (and Instance Name if appropriate) e.g. SQLSERVER or SQLSERVER\PAYROLL.

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

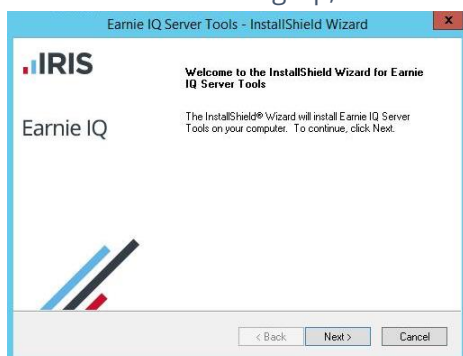
7. Click **Next**
8. The database update will now run. You are kept informed of the progress of the update(s) and are finally told that the updates have been transferred to the server. Click **Exit** to finish the process



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

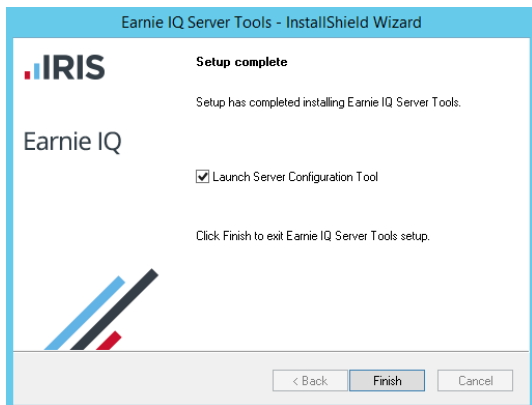
Server Upgrade – Server Update Utility method

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

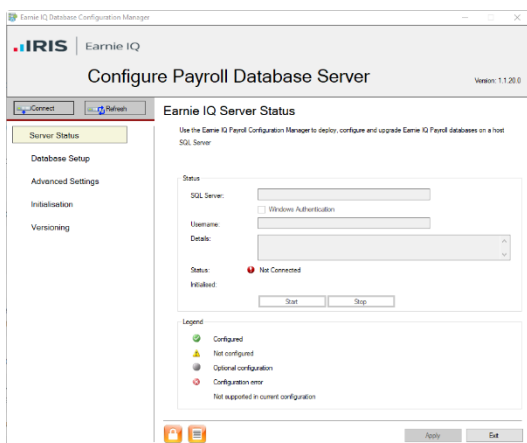


3. Click **Next** and accept the licence agreement

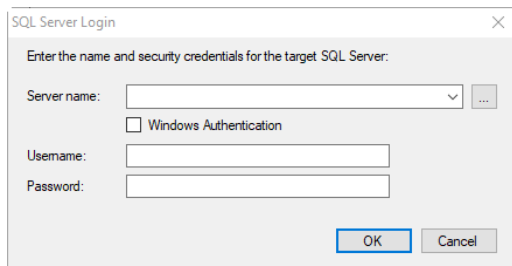
4. Click **Next** to confirm a typical installation
5. Then select **Next** to start copying files
6. Once the files have been copied, click **Finish** to launch the **Server Configuration Tool**. If you prefer to do this later, you can run the **Server Configuration Utility** from the **Start Menu**



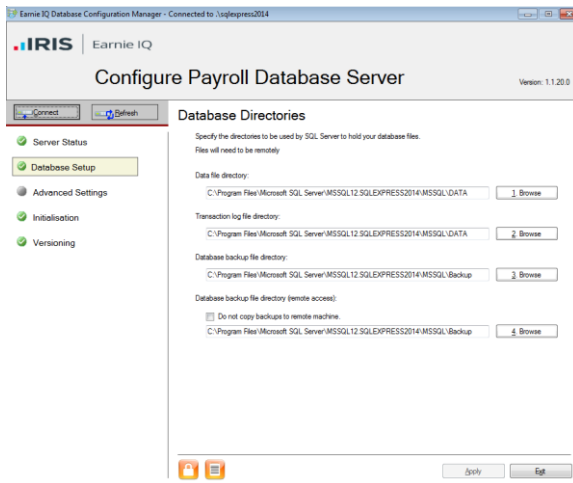
7. The **Server Configuration Manager** screen will be displayed



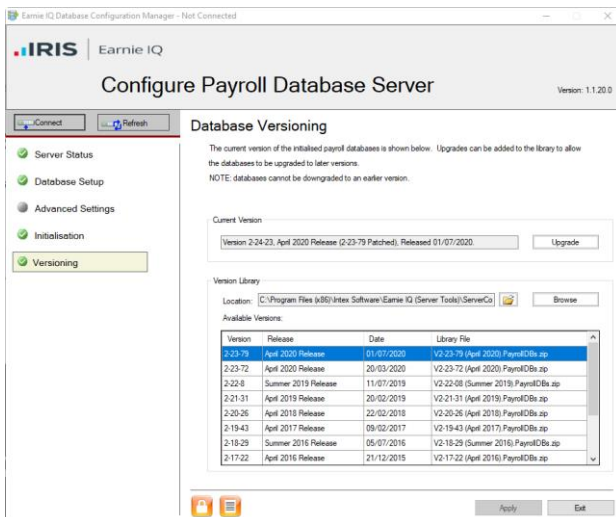
8. Click **Connect** and enter valid security credentials



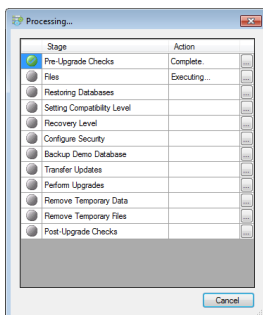
9. Select **Database Setup** and click the **Verify** option to ensure configuration is correct



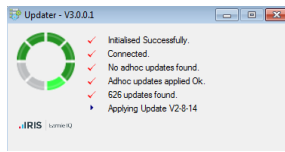
10. Select **Versioning** to continue with the server upgrade



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:



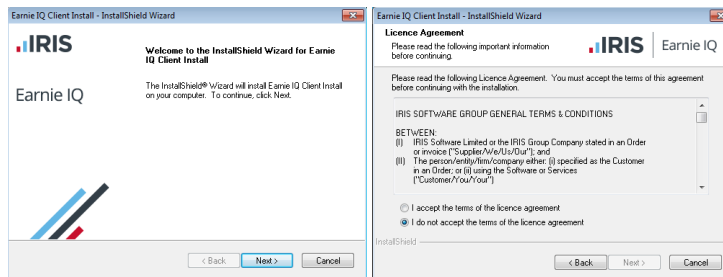
13. Existing companies will then be upgraded



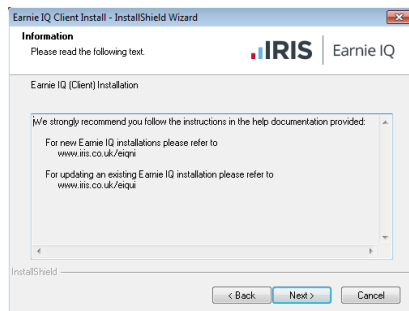
14. The Update Log text file will now be displayed. Scroll down to the last entry and check that no errors have occurred

Client Upgrade

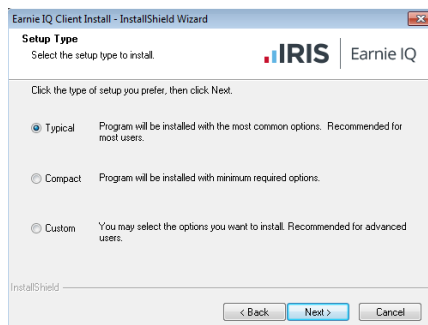
1. Download the **EarnieIQ (Client Only).exe** file from the website
2. Run the self-extracting zip, which will begin the installation process.



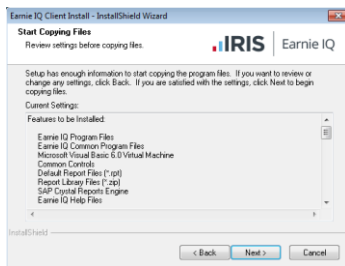
3. Click **Next** and accept the licence agreement



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

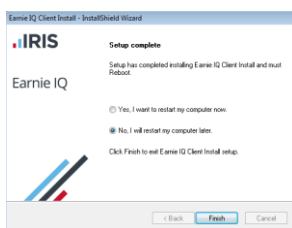


5. Click **Next** to confirm a typical installation



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 EarnieIQ client machines (if more than one)

Useful numbers

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

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

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