



INSTALL/UPGRADE GUIDE FOR VERSION 12.7.x.x

This article explains how to install a brand new version of Simply Personnel or upgrade an existing instance to the latest version SP 12.7.x.x **Users of Simply Personnel 2009 or earlier** should contact our support team for further assistance.

Important!

It is important before you start the upgrade process that you take a full backup of your database. If you are unsure how to do this please contact your IT department for guidance.

During the upgrade process the software will not be available to users. Please make sure you schedule the upgrade when users will not be accessing the service – or that you notify users the software will not be available until the upgrade has completed.

Index:

1 Upgrading your database: Refer to this section if you need to upgrade the `Personnel` database on your SQL server (**Pages 2 – 4**)

2: Upgrading Personnel Manager: Refer to this section if you need to upgrade Personnel Manager on client machines
(**Pages 5 – 10**)

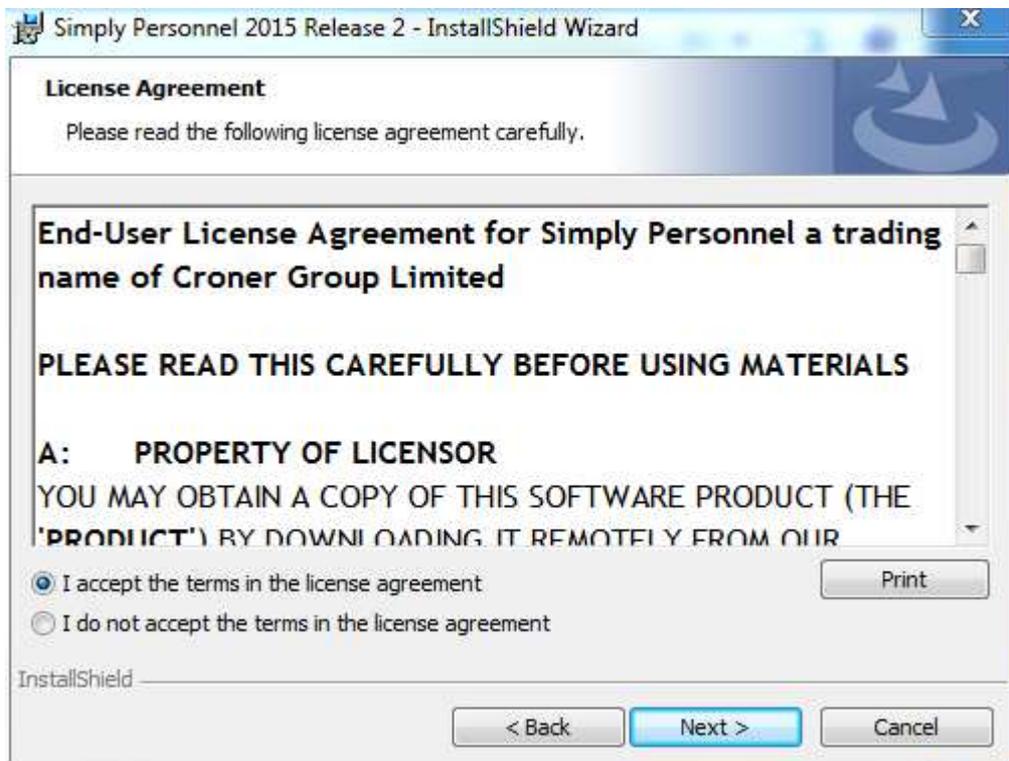
3: Upgrading Self Service: Refer to this section if you need to upgrade Self Service on either your SQL or IIS server.
(**Pages 11 – 15**)

1. Upgrading your database:

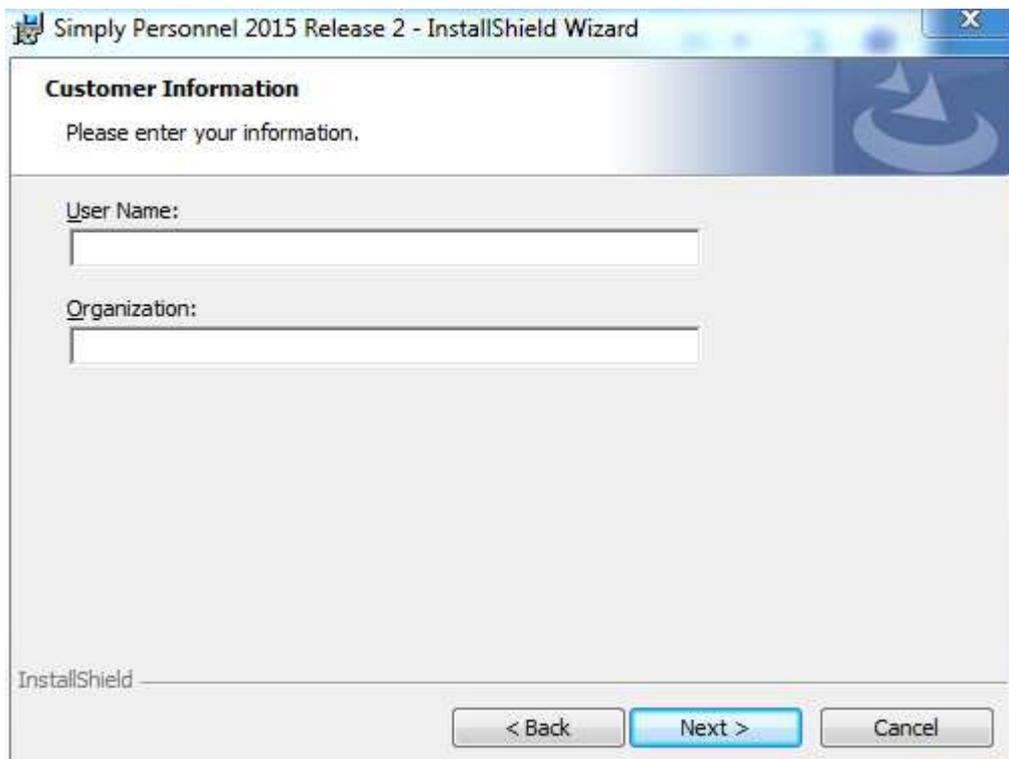
- On the SQL server containing the instance that holds the `Personnel` database Run **setup.exe** (this will need to be done with **Administrator** privileges).
- When the installer file has finished decompressing, you will see the first screen of the wizard. Click **Next** to continue.



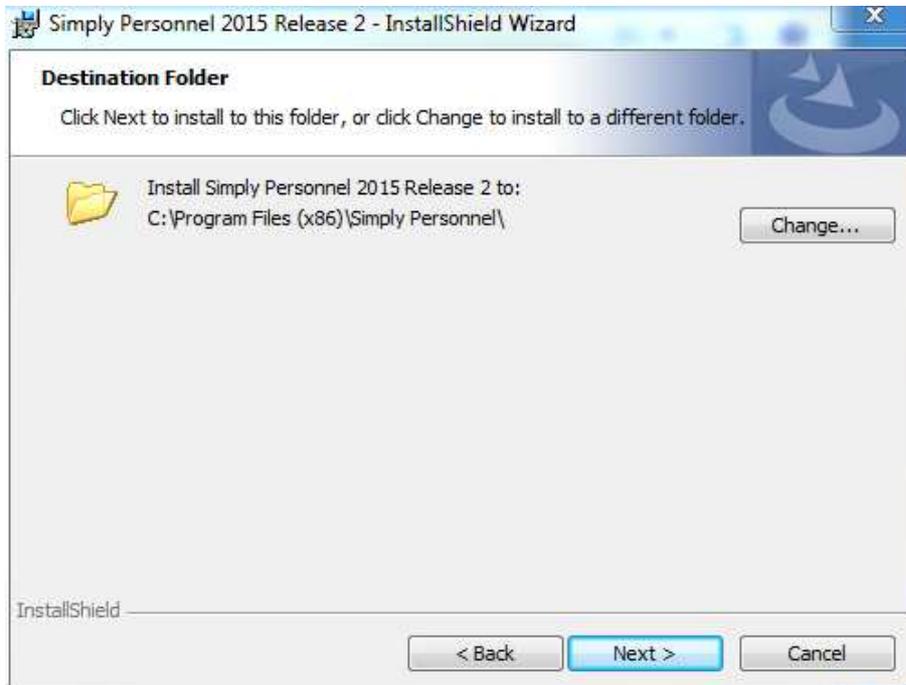
- Select the **I accept the terms in the license agreement** option and click **Next** to continue.



- In the following screen, you may enter your User Name and Organization details. However, this information has no bearing on Simply Personnel whatsoever. Click **Next** to continue.



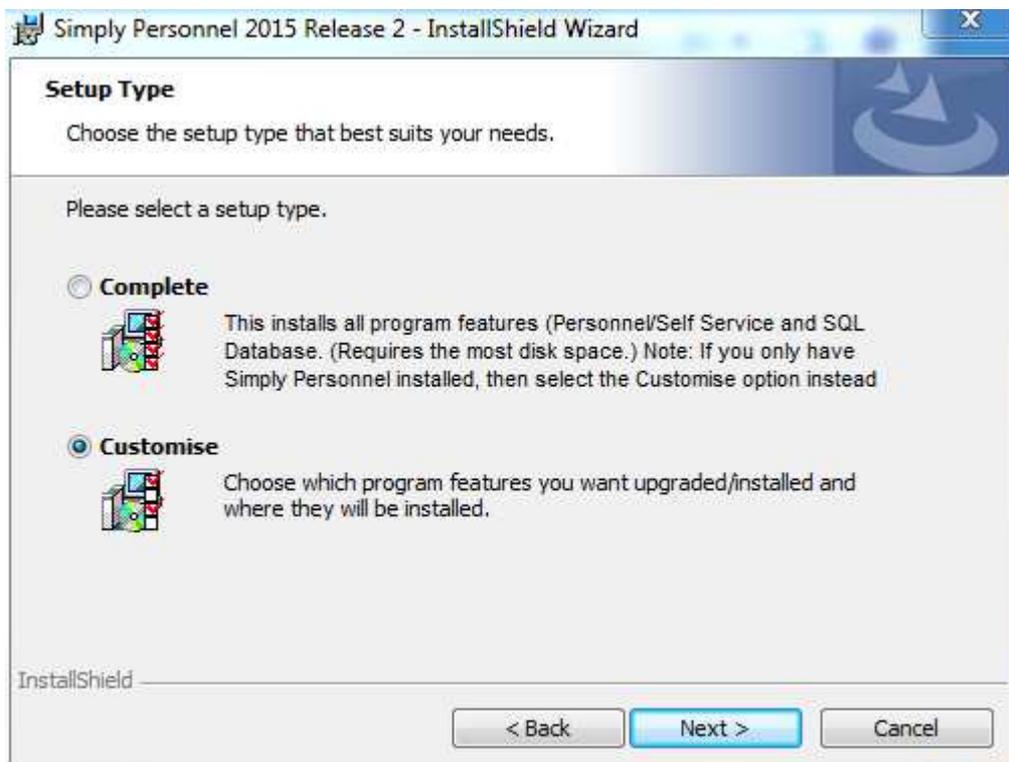
- You will now be prompted for an installation folder for the software. In most cases the default path is fine, however you can click the **Browse** button to choose a different location if you wish. Click **Next** to continue.



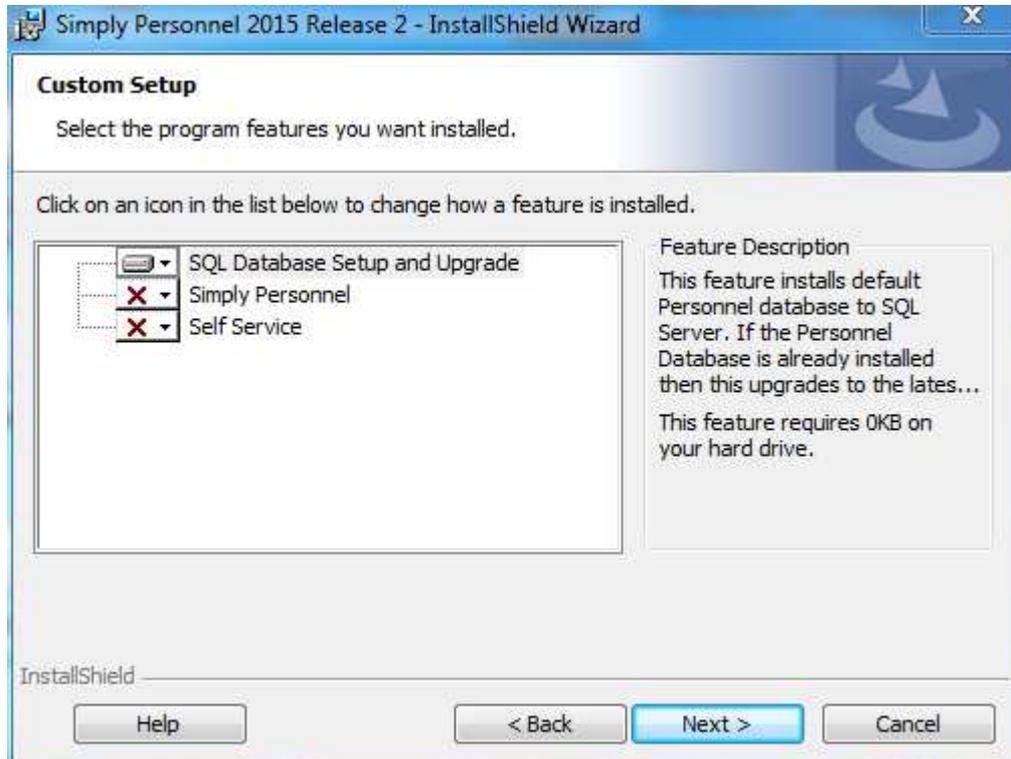
- In the following screen, select the **SQL Server** for your existing **Personnel** database by picking it from the **drop-down menu** or clicking the **Browse** button.



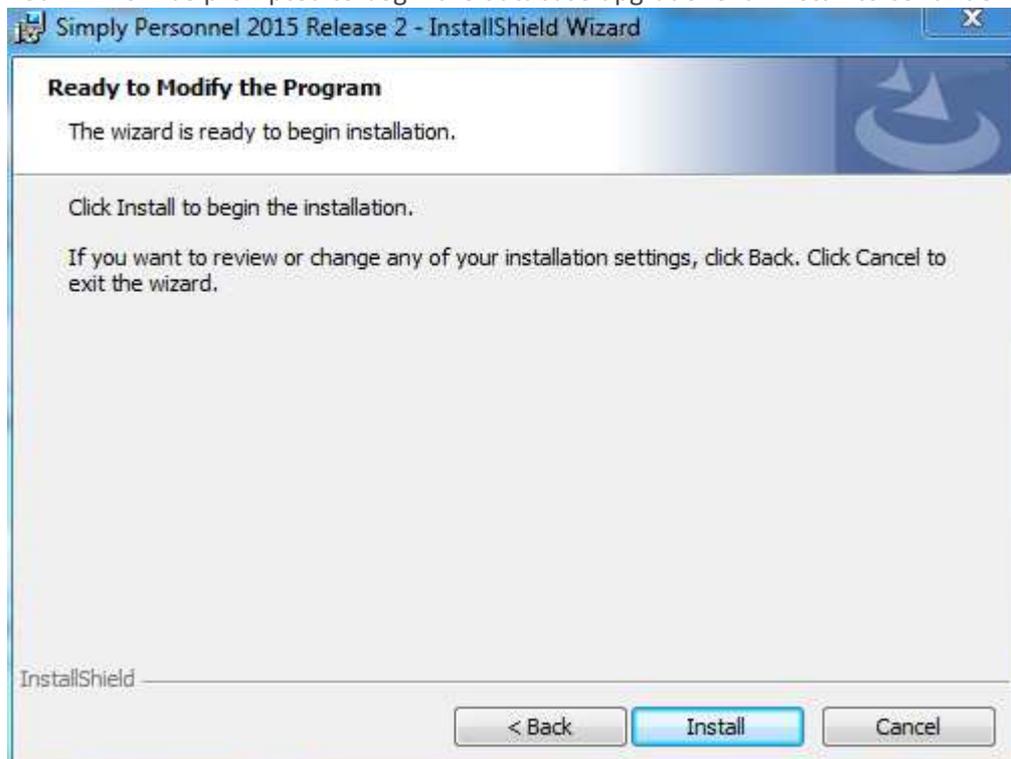
- You also have the choice of connecting to the SQL server using either **Windows authentication** (which will use the credentials of the Windows User running the installer file to authenticate) or by specifying your **Server Admin (sa)** credentials and using SQL Server authentication instead. In most cases, running the installer file as a **domain Administrator** will allow you to use the default Windows authentication method. Click **Next** to continue.
- Select the **Customise** option in the following screen and click **Next** to continue. **Note that the Complete option will attempt to create a new blank SQL database on the server you chose previously. The install scripts have been designed to fail if there is already a Personnel database resident on the SQL server, meaning your existing database will not be affected. However, the installer file will generate an error message and will then roll back the installation.**



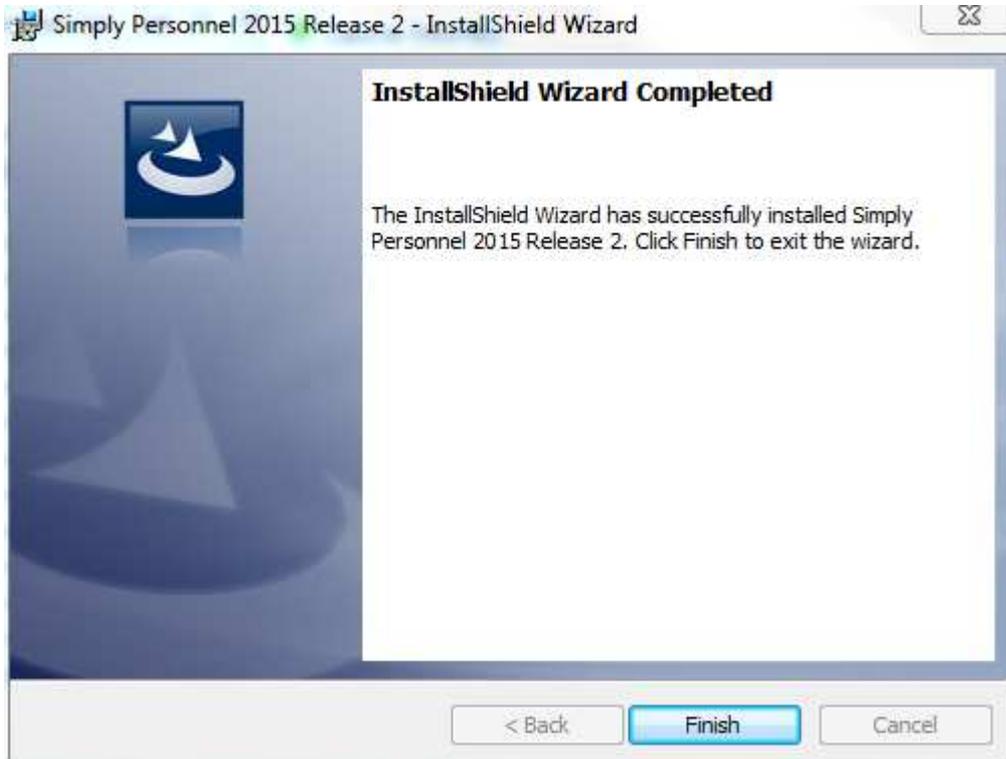
- At the following screen, ensure that only the **SQL Database Setup and Upgrade** option is selected (the Simply Personnel and Self Service options must have a red 'X' set). Click **Next** to continue.



- You will now be prompted to begin the database upgrade. Click **Install** to continue.



- This is the final screen of the setup wizard. You may click the **Finish** button to exit the installer

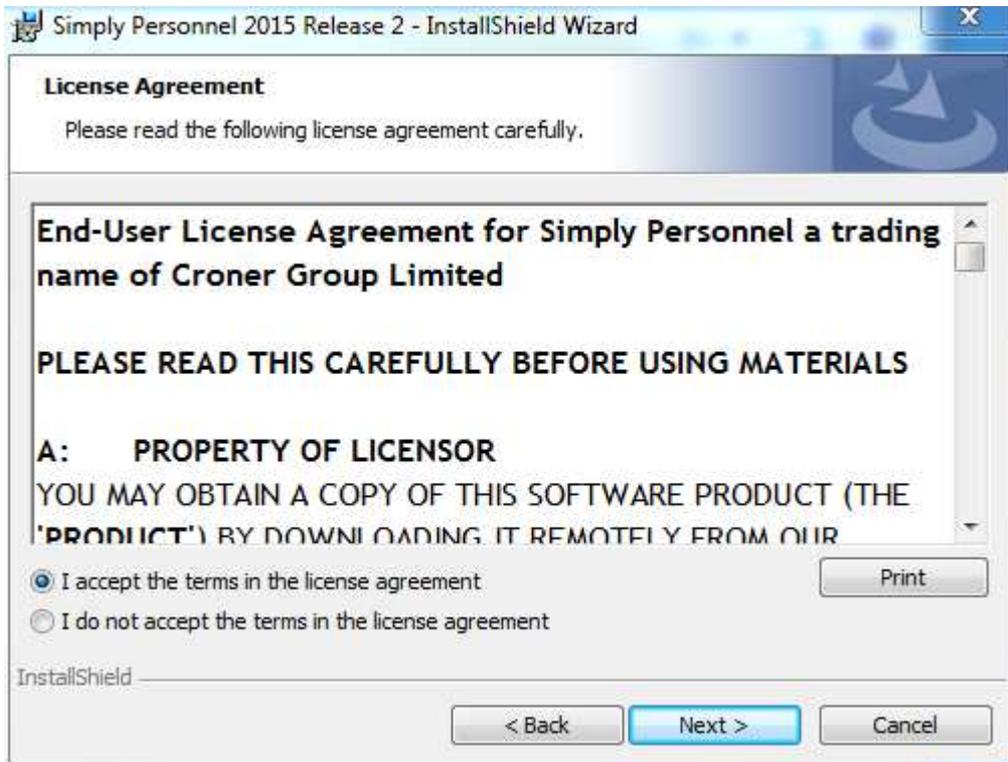


2. Upgrading Personnel Manager:

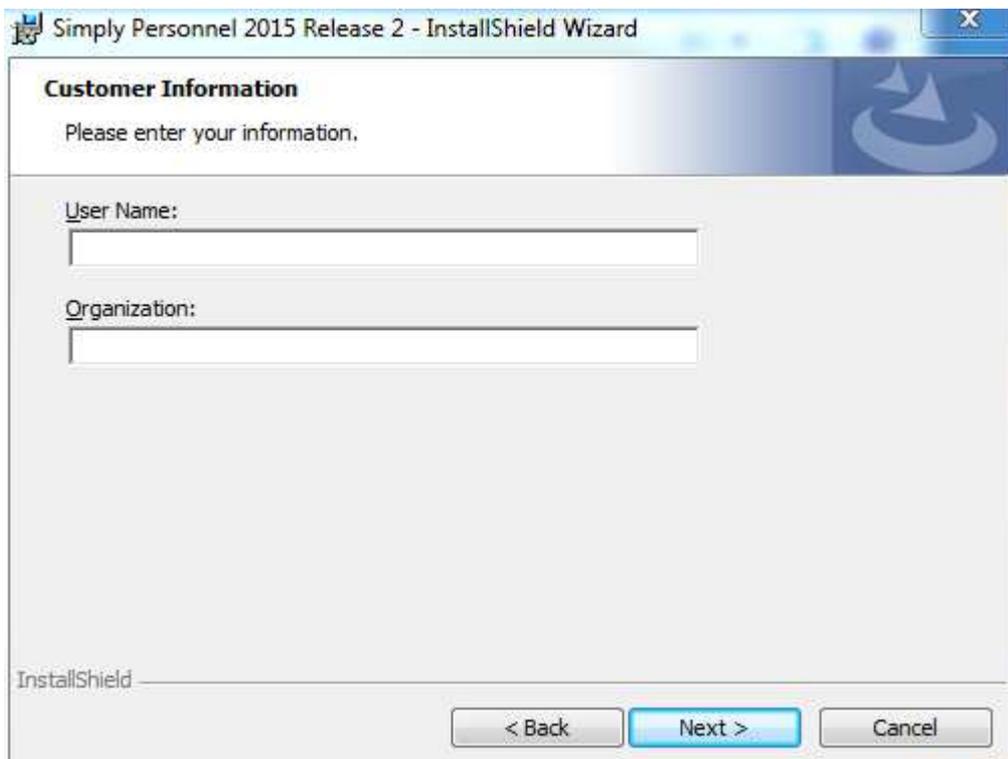
- On each client machine that requires an upgrade Run **setup.exe** (this will need to be done with **Administrator** privileges).
- When the installer file has finished decompressing, you will see the first screen of the wizard. Click **Next** to continue.



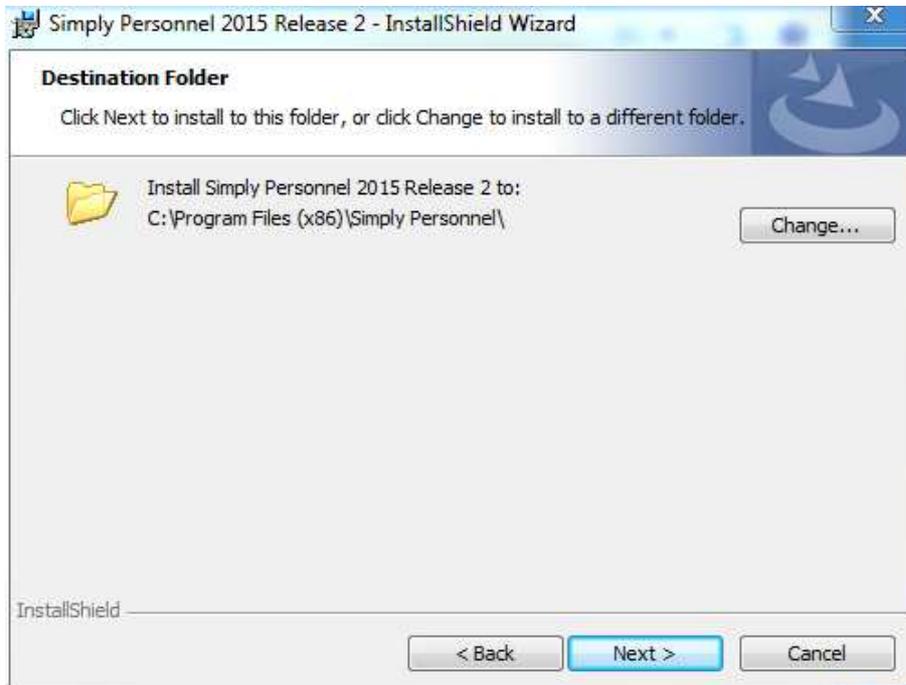
- Select the **I accept the terms in the license agreement** option and click **Next** to continue.



- In the following screen, you may enter your User Name and Organization details. However, this information has no bearing on Simply Personnel whatsoever. Click **Next** to continue.



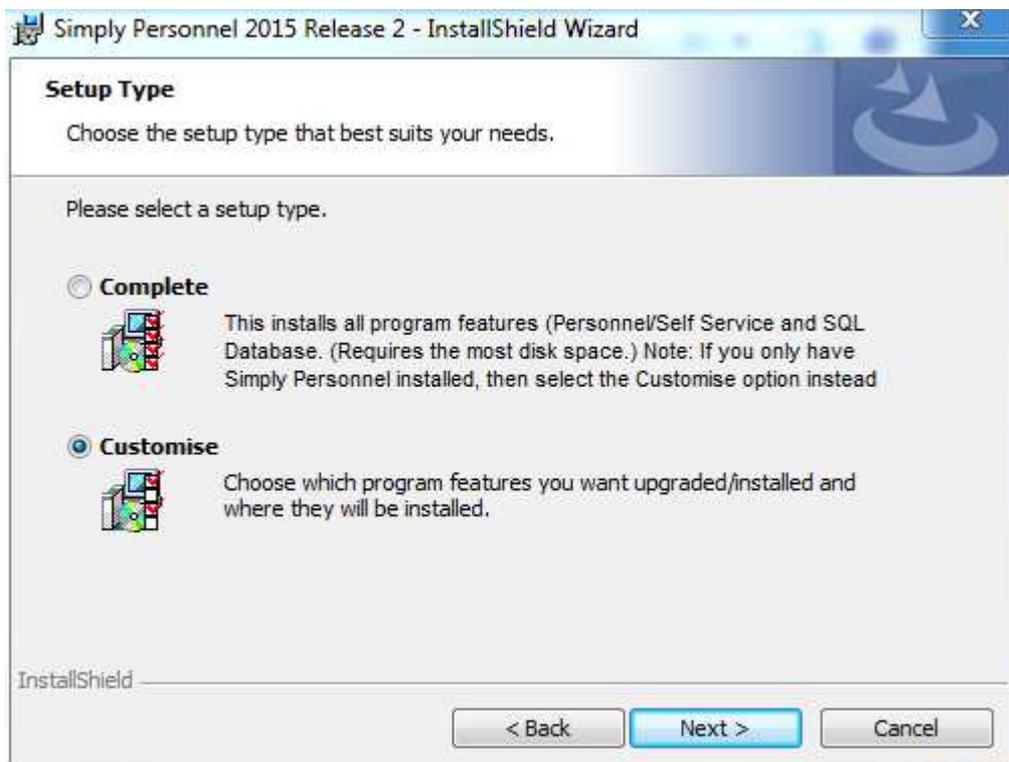
- You will now be prompted for an installation folder for the software. In most cases the default path is fine, however you can click the **Browse** button to choose a different location if you wish. Click **Next** to continue.



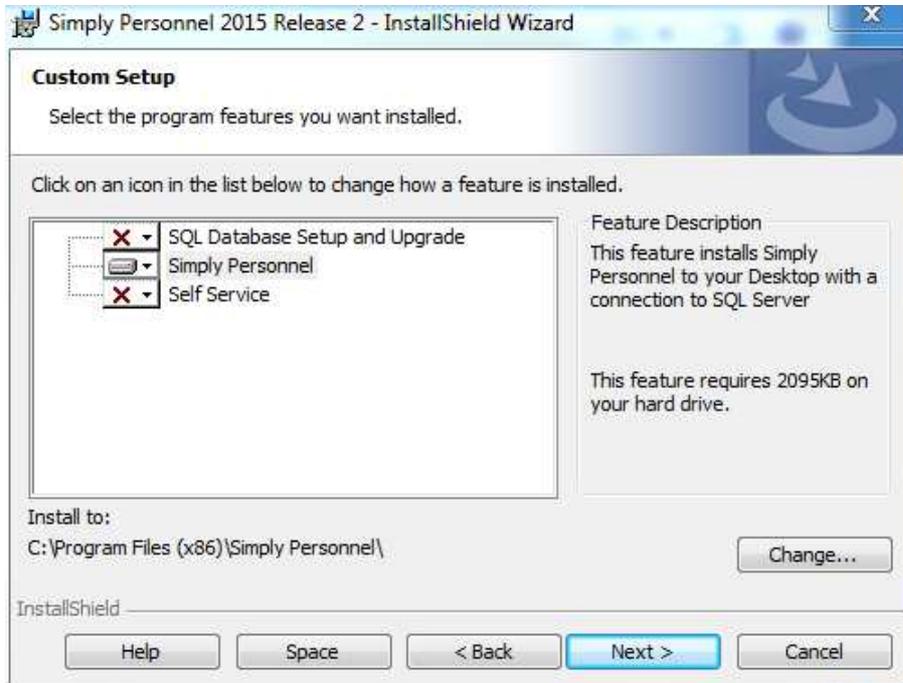
- In the following screen, select the **SQL Server** for your existing **Personnel** database by picking it from the **drop-down menu** or clicking the **Browse** button.



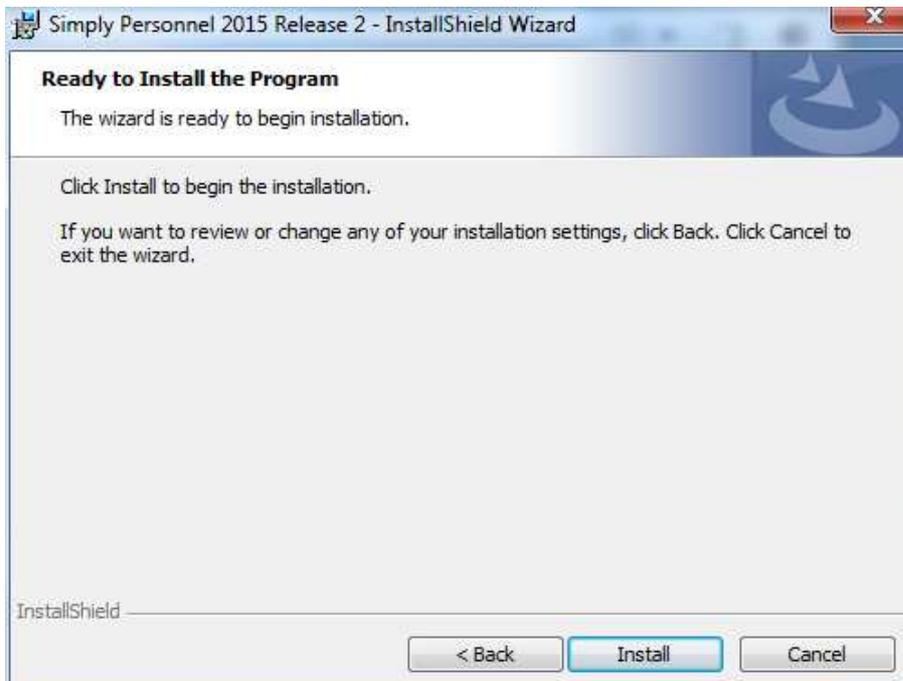
- You also have the choice of connecting to the SQL server using either **Windows authentication** (which will use the credentials of the Windows User running the installer file to authenticate) or by specifying your **Server Admin (sa)** credentials and using SQL Server authentication instead. In most cases, running the installer file as a **domain Administrator** will allow you to use the default Windows authentication method. Click **Next** to continue.
- Select the **Customise** option in the following screen and click **Next** to continue. **Note that the Complete option will attempt to create a new blank SQL database on the server you chose previously. The install scripts have been designed to fail if there is already a Personnel database resident on the SQL server, meaning your existing database will not be affected. However, the installer file will generate an error message and will then roll back the installation.**



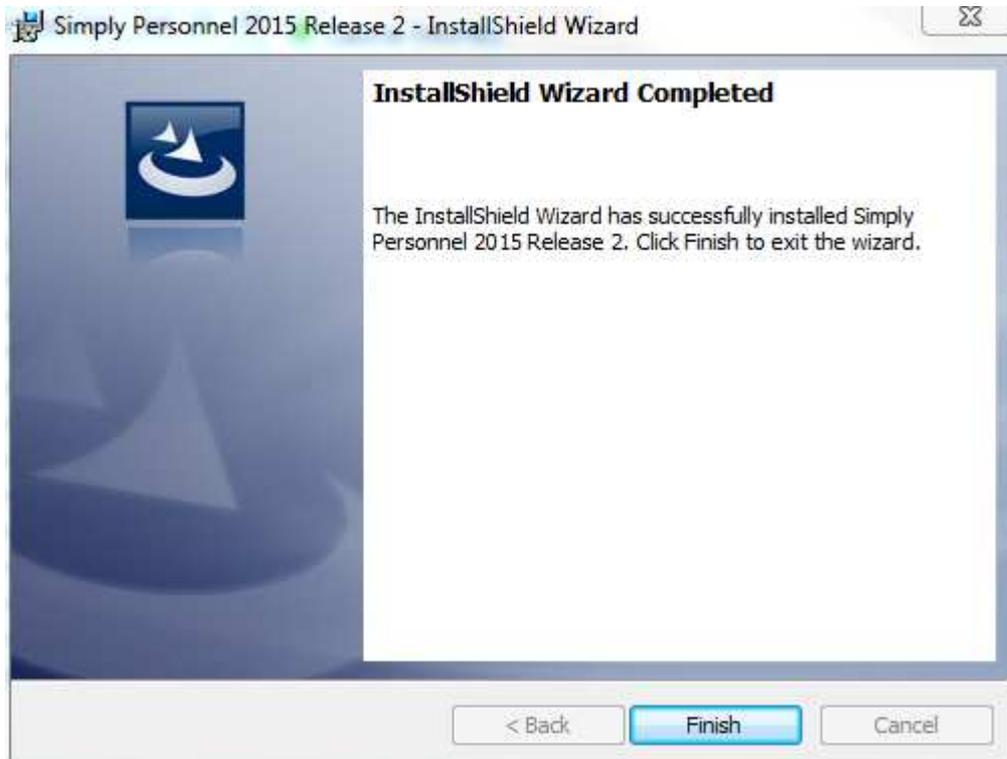
- In the following screen, **make sure the only hard-drive icon is next to 'Simply Personnel', the other two options must have a red X next to them.**



- This is the final screen of the setup wizard. You may click the **Back** button to modify any of your choices so far or click **Install** to upgrade the software.



- This is the final screen of the setup wizard. You may click the **Finish** button to exit the installer



3. Upgrading Self Service:

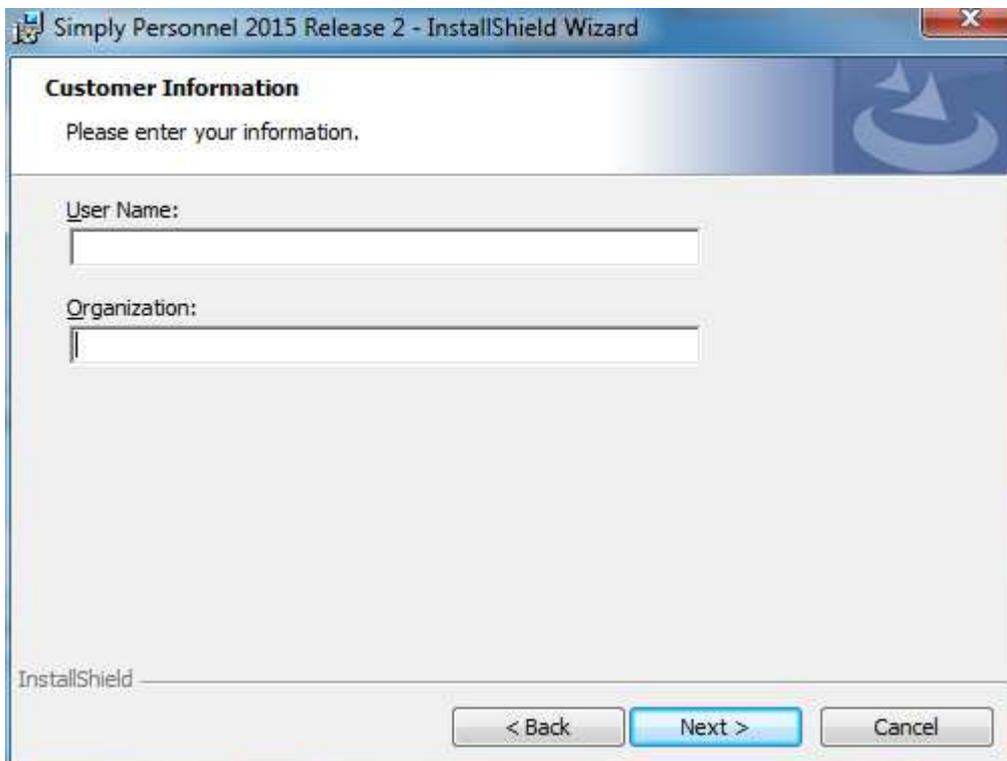
- On the SQL or IIS server run **setup.exe** (this will need to be done with **Administrator** privileges).
- When the installer file has finished decompressing, you will see the first screen of the wizard. Click **Next** to continue.



- Select the **I accept the terms in the license agreement** option and click **Next** to continue.



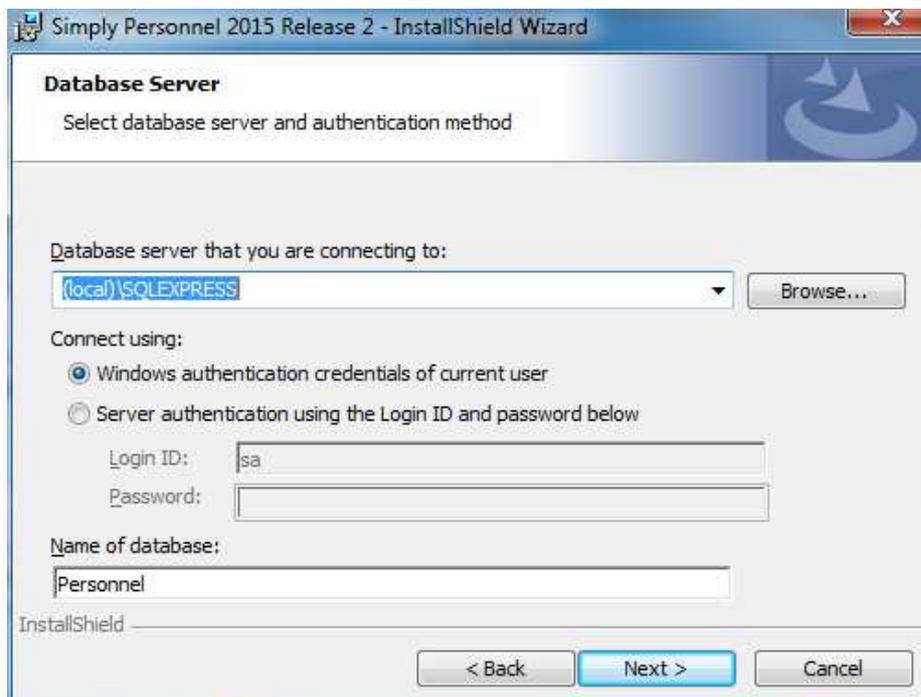
- In the following screen, you may enter your User Name and Organization details. However, this information has no bearing on Simply Personnel whatsoever. Click **Next** to continue.



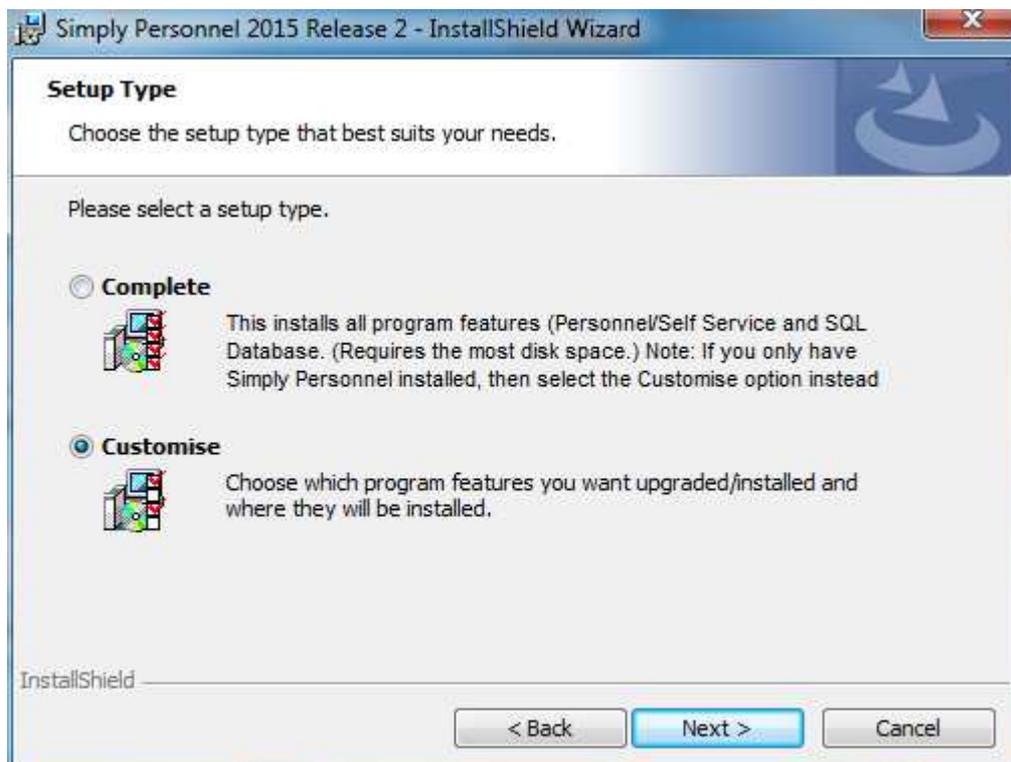
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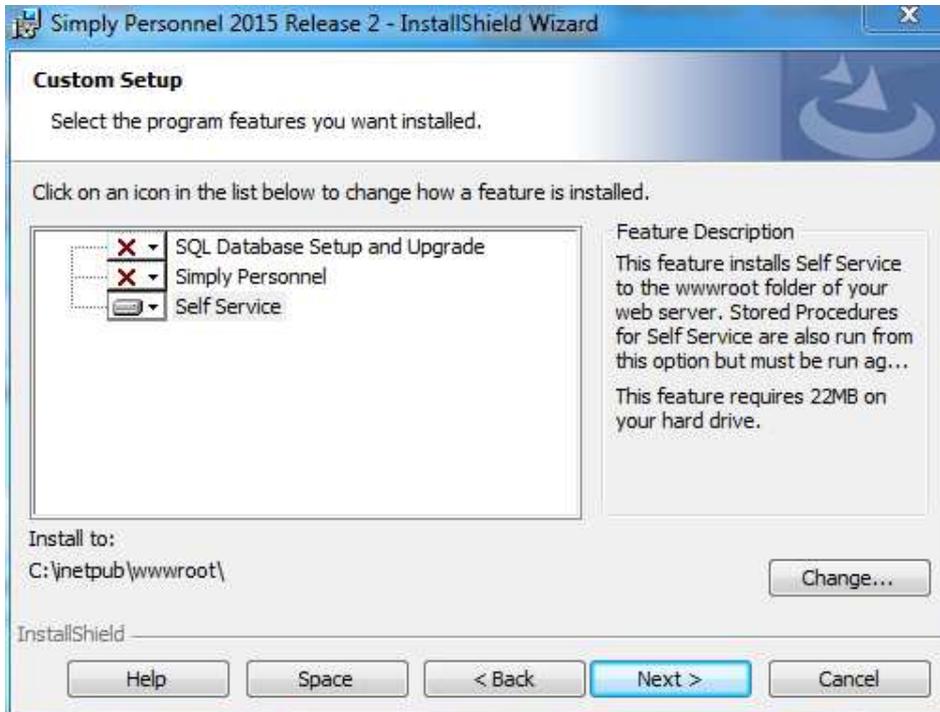
- In the following screen, select the **SQL Server** for your existing **Personnel** database by picking it from the **drop-down menu** or clicking the **Browse** button.



- You also have the choice of connecting to the SQL server using either **Windows authentication** (which will use the credentials of the Windows User running the installer file to authenticate) or by specifying your **Server Admin (sa)** credentials and using SQL Server authentication instead. In most cases, running the installer file as a **domain Administrator** will allow you to use the default Windows authentication method. Click **Next** to continue.
- Select the **Customise** option in the following screen and click **Next** to continue. **Note that the Complete option will attempt to create a new blank SQL database on the server you chose previously. The install scripts have been designed to fail if there is already a Personnel database resident on the SQL server, meaning your existing database will not be affected. However, the installer file will generate an error message and will then roll back the installation.**



- In the following screen, **make sure the only hard-drive icon is next to `Self Service`, the other two options must have a red X next to them.**



- This is the final screen of the setup wizard. You may click the **Finish** button to exit the installer

