



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:

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

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

<u>3: Upgrading Self Service:</u> 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.

Simply Personnel 2015 Rele	ease 2 - InstallShield Wizard
2	Welcome to the InstallShield Wizard for Simply Personnel 2015 Release 2
	The InstallShield(R) Wizard will allow you to modify, repair, or remove Simply Personnel 2015 Release 2. To continue, dick Next.
2	
	< Back Next > Cancel



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

License Agreement		2
Please read the following license	agreement carefully.	
End-User License Agre	ement for Simply P	ersonnel a trading 🔶
name of Croner Group	Limited	
PLEASE READ THIS CAI	REFULLY BEFORE U	SING MATERIALS
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• 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.

😸 Simply Personnel 2015 Release 2 - I	nstallShield Wiza	rd	×
Customer Information Please enter your information.			L
User Name:			
Organization:			
InstallShield	8		
	< Back	Next >	Cancel



• 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.

s simply Personne	2015 Release 2 -	InstallShield Wizard	Le contraction y	<u> </u>
Database Serve	e			4
Select database :	server and authentic	ation method		
Database server ti	nat vou are connecti	ing to:		
(local)\SQLEXPRE	SS .	-	•	Browse
Connect using:				5
Windows auti	nentication credentia	als of current user		
C Server auther	ntication using the L	ogin ID and password	below	
Login ID:	sa			-
Login ID: Password:	sa			-
Login ID: Password: Name of database	sa [_
Login ID: Password: Name of database Personnel	sa			
Login ID: Password: Name of database Personnel stallShield	sa [;			



- 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.

Setup Type	satur tuna that hast suits your needs	
choose the	setup type that best suits your needs.	
Please selec	t a setup type.	
Comple	te	
1 ¹	This installs all program features (Personnel/Self Database. (Requires the most disk space.) Note: Simply Personnel installed, then select the Custon	Service and SQL If you only have nise option instead
© Custon	ise	
13	Choose which program features you want upgrad where they will be installed.	led/installed and
-lich-al-		



• 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.

Custom Setup Select the program features you want installed.	E
Click on an icon in the list below to change how a feature SQL Database Setup and Upgrade Simply Personnel Self Service	is installed. Feature Description This feature installs default Personnel database to SQL Server. If the Personnel Database is already installed then this upgrades to the lates This feature requires 0KB on your hard drive.
istailShield < Back	Next > Cancel

You will now be prompted to begin the database upgrade. Click Install to continue.
 Simply Personnel 2015 Release 2 - InstallShield Wizard

Ready to Modify the Program The wizard is ready to begin installation	۱.		と
Click Install to begin the installation.			
If you want to review or change any of exit the wizard.	f your installation	settings, click Back. (Click Cancel to
InstallShield	0		
	< Back	Install	Cancel



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

InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Simply Personnel 2015 Release 2, Click Finish to exit the wizard.

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.



Build 12.7.x.x



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

Please read the following license agreement carefully. End-User License Agreement for Simply Personnel a trading name of Croner Group Limited PLEASE READ THIS CAREFULLY BEFORE USING MATERIALS A: PROPERTY OF LICENSOR YOU MAY OBTAIN A COPY OF THIS SOFTWARE PRODUCT (THE 'PRODUCT') BY DOWNLOADING. IT REMOTELY FROM OUR I accept the terms in the license agreement I do not accept the terms in the license agreement	License Agreement	
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• 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.

😸 Simply Personnel 2015 Release 2 - I	nstallShield Wiza	rd	×
Customer Information Please enter your information.			L
User Name:			
Organization:			
InstallShield	8		
	< Back	Next >	Cancel



• 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.

s simply Personne	2015 Release 2 -	InstallShield Wizard	Le contraction y	<u> </u>
Database Serve	e			4
Select database :	server and authentic	ation method		
Database server ti	nat vou are connecti	ing to:		
(local)\SQLEXPRE	SS .	-	•	Browse
Connect using:				5
Windows auti	nentication credentia	als of current user		
C Server auther	ntication using the L	ogin ID and password	below	
Login ID:	sa			-
Login ID: Password:	sa			-
Login ID: Password: Name of database	sa [_
Login ID: Password: Name of database Personnel	sa			
Login ID: Password: Name of database Personnel stallShield	sa [;			



- 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.

Setup Type		
Choose the	setup type that best suits your needs.	
Please selec	t a setup type.	
Comple	te	
1 ¹	This installs all program features (Personnel/Self S Database. (Requires the most disk space.) Note: I Simply Personnel installed, then select the Custom	Service and SQL f you only have lise option instead
Ouston	lise	
15	Choose which program features you want upgrade where they will be installed.	ed/installed and



• 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.

Select the program fe	atures you want installe	ed.		2
Click on an icon in the lit SQL Da Simply F X V Self Ser	st below to change how tabase Setup and Upgra Personnel vice	a feature is ir	nstalled. Feature Descrip This feature ins Personnel to yo connection to Si This feature req your hard drive	tion talls Simply ur Desktop with a QL Server uires 2095KB on
nstall to: ::\Program Files (x86)\ stallShield	Simply Personnel\]	Change

• 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.

😸 Simply Personnel 2015 Release 2 - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back Install Cancel



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

	InstallShield Wizard Completed
0	The InstallShield Wizard has successfully installed Simply Personnel 2015 Release 2. Click Finish to exit the wizard.



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.

2	Welcome to the InstallShield Wizard for Simply Personnel 2015 Release 2
	The InstallShield(R) Wizard will install Simply Personnel 2015 Release 2 on your computer. To continue, click Next.
	Note: If you already have Simply Personnel installed on your computer, this will upgrade to Version 12.7.0.2
	WARNING: This program is protected by copyright law and international treaties.



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

Please read the following license agreement carefully.	
End-User License Agreement for Simply	y Personnel a trading 🔺
name of Croner Group Limited	
PLEASE READ THIS CAREFULLY BEFORE	USING MATERIALS
A: PROPERTY OF LICENSOR	
YOU MAY OBTAIN A COPY OF THIS SOFTW	ARE PRODUCT (THE
PRODITCT') BY DOWNLOADING IT REMOT	
I accept the terms in the license agreement	Print
) I do not accept the terms in the license agreement	

• 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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• 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.

Destinat Click Ne	t ion Folder ext to install to this folder, or click Change to install to a different folder.	4
Ø	Install Simply Personnel 2015 Release 2 to: C:\Program Files (x86)\Simply Personnel\ Cha	inge
InstallShield -	< Back Next > C	ancel

• 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.

Database Server Select database s	erver and auth	entication me	thod			2
<u>D</u> atabase server t	nat you are con	necting to:				
(local) \SQLEXPRE	ss				•	Browse
Connect using:					10	
Connect using:	ientication cred	entials of curi	rent user			
Connect using: Windows auther Server auther	nentication cred	entials of curi he Login ID a	rent user nd passwo	rd below		
Connect using: Windows authors Server auther Login ID;	nentication cred ntication using t	entials of curi he Login ID a	rent user nd passwo	rd below		24 1
Connect using: Windows auther Server auther Login ID: Password:	nentication cred ntication using t sa	entials of curi he Login ID a	rent user nd passwo	rd below		
Connect using: Windows auther Server auther Login ID: Password: Name of database	nentication cred	entials of curi he Login ID a	rent user nd passwo	rd below		
Connect using: Windows author Server author Login ID: Password: Name of database Personnel	nentication cred ntication using ti sa	entials of curi he Login ID a	rent user nd passwo	rd below		



- 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.**

Setup Type Choose the	setup type that best suits your needs.
Please selec	t a setup type.
Comple	te
1	This installs all program features (Personnel/Self Service and SQL Database. (Requires the most disk space.) Note: If you only have Simply Personnel installed, then select the Customise option instead
Custom	ise
13	Choose which program features you want upgraded/installed and where they will be installed.



• 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.

Select the program features you want installed.	5
Click on an icon in the list below to change how a feature SQL Database Setup and Upgrade Simply Personnel Self Service	is installed. Feature Description This feature installs Self Service to the wwwroot folder of your web server. Stored Procedures for Self Service are also run from this option but must be run ag This feature requires 22MB on your hard drive.
nstall to: :Vinetpub/wwwroot/ stallShield	Change

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

