



Upgrading to Web TimeOff 1.6

from REPLICON

version 1.6



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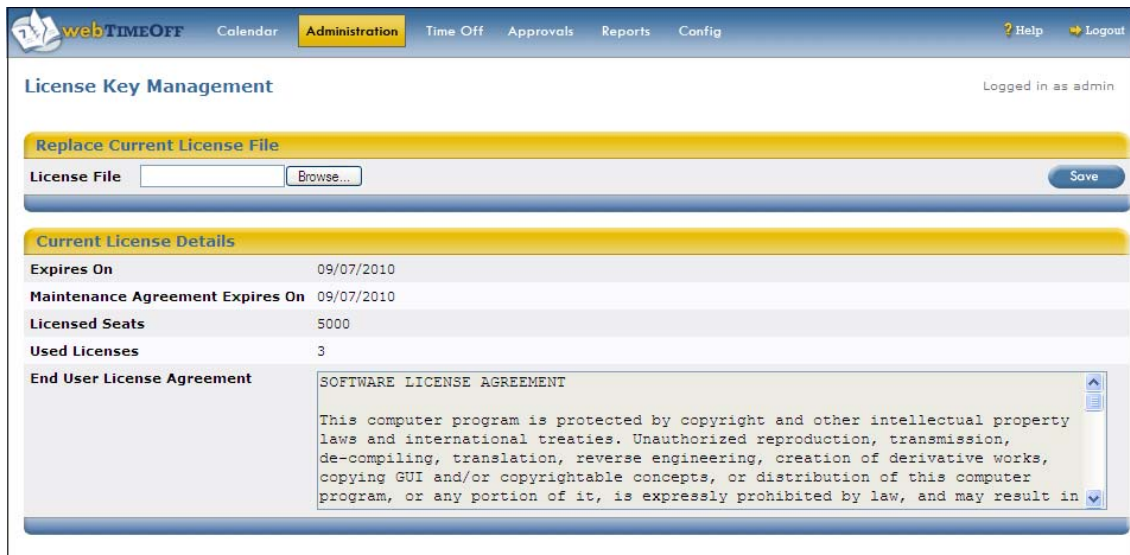
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Upgrading to Web TimeOff 1.6

License File Verification

Before upgrading your Web TimeOff installation, verify that the original installation has not passed the maintenance expiry date. If the maintenance agreement is still in effect (i.e., the expiry date has not passed), you can upgrade your existing Web TimeOff installation and continue to use the upgraded version even after the maintenance agreement expires. However, if you attempt to upgrade the installation after the maintenance agreement has already expired, you will not be able to access the new version.

To verify the maintenance agreement expiry date, select **Licensing** from the **Administration** menu.



The screenshot displays the webTIMEOFF Administration interface. The top navigation bar includes 'Calendar', 'Administration' (highlighted), 'Time Off', 'Approvals', 'Reports', and 'Config'. The user is logged in as 'admin'. The main section is titled 'License Key Management' and contains a 'Replace Current License File' section with a 'License File' input field and a 'Browse...' button. Below this is the 'Current License Details' section, which lists the following information:

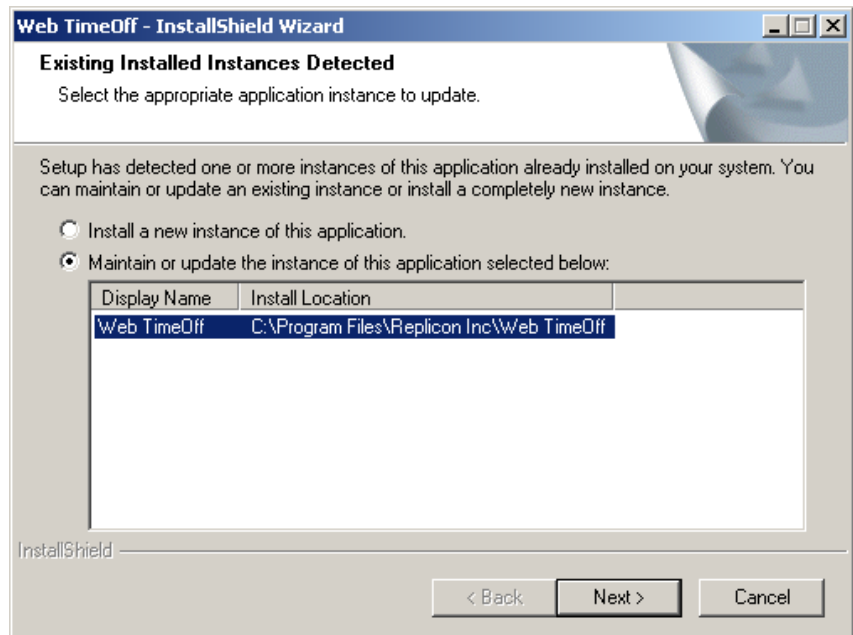
Expires On	09/07/2010
Maintenance Agreement Expires On	09/07/2010
Licensed Seats	5000
Used Licenses	3
End User License Agreement	SOFTWARE LICENSE AGREEMENT This computer program is protected by copyright and other intellectual property laws and international treaties. Unauthorized reproduction, transmission, de-compiling, translation, reverse engineering, creation of derivative works, copying GUI and/or copyrightable concepts, or distribution of this computer program, or any portion of it, is expressly prohibited by law, and may result in

Upgrading an Existing Installation

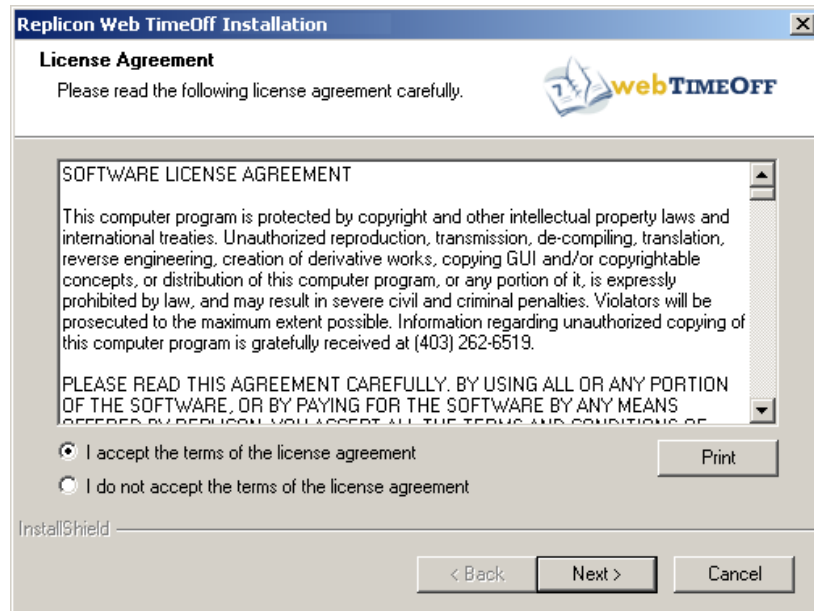
Note: If Web TimeOff is currently configured to use **Built-in Authentication**, it is possible to change the authentication method to **Integrated Windows Authentication** through the upgrade process. If you wish to do this, before running the installation program, change the **User Name** specified for the system administrator to match that employee's Windows user name. This will ensure the system administrator can still access the system once the upgrade is complete. Authentication methods are discussed further in [Step 4](#) on page 6.

To upgrade your existing Web TimeOff installation:

1. Run the installation program.
2. To upgrade the existing Web TimeOff installation, select the option to **Maintain or update the instance....** Select the appropriate instance of Web TimeOff to upgrade and select **Next** to continue.

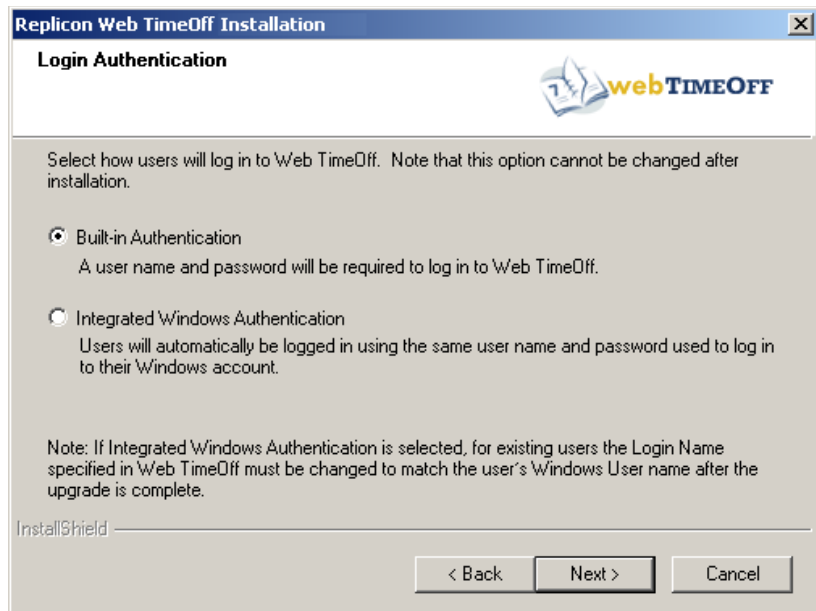


3. Read the license agreement carefully. Select the **I accept...** option under the agreement to accept the terms of the license agreement and proceed with the installation. You must accept the license agreement to install Web TimeOff. When you are ready, select **Next** to continue.



4. Select the authentication method to be used when users are logging in to Web TimeOff. If **Built-in Authentication** is selected, users will be required to enter a user name and password specific to Web TimeOff to access the system. If **Integrated Windows Authentication** is selected, users can be automatically logged in to Web TimeOff using the same user name and password used to access their Windows account. When done, select the **Next** button.

Note: If you were previously using **Built-in Authentication**, including as part of the demonstration version, and now wish to use **Integrated Windows Authentication**, the **User Name** specified in Web TimeOff for each existing employee must be changed to match the employee's Windows user name. Until this change is made, employees will not be able to access the system.



If the **Built-in Authentication** option was selected, continue on to [Step 5](#) on the next page. If you selected **Integrated Windows Authentication**, move to step [Step 6](#) on page 8.

5. If you selected **Built-in Authentication** in the previous step, enter a password for the `root` user account, which will be created during installation, and click **Next**. This account can be used to restore the system administrator's account if it is inadvertently disabled or deleted. For more information on the `root` account, see the *Web TimeOff User Guide*.

Replicon Web TimeOff Installation

Enter Password for "root" Account

An account under the user name "root" will automatically be created in Web TimeOff during installation. This account can be used to restore the system administrator's account if it is inadvertently disabled or deleted.

Please enter a password for the "root" account and ensure the password is recorded in a safe location for future use.

Password:

Confirm Password:

InstallShield

< Back Next > Cancel

6. You must now decide whether to upgrade the existing database, or create a copy of the existing database, as described below:

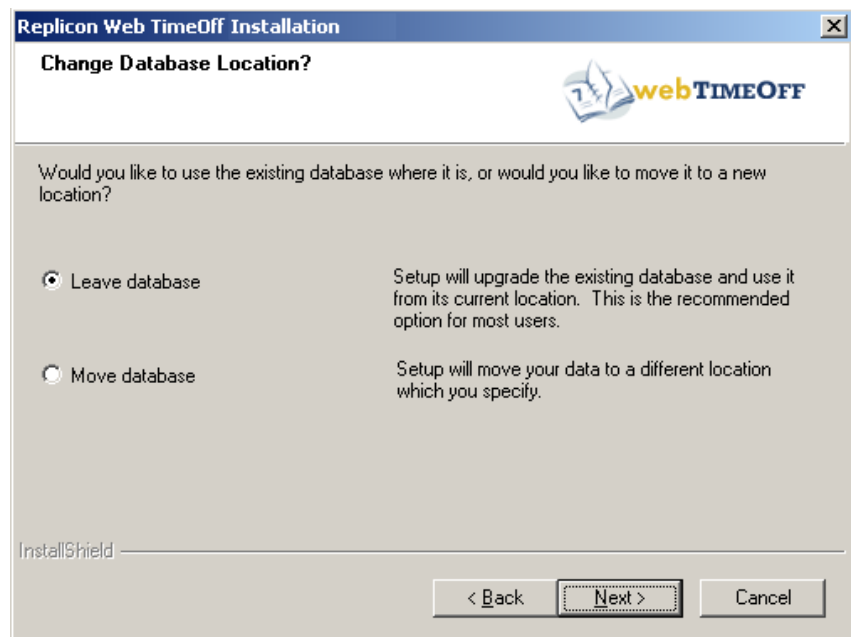
- Leave database

Select **Leave database** to upgrade the current database structure with all data intact. This option is the recommended upgrade choice.

- Move database

Select **Move database** to create a copy of the existing database and upgrade the copy. This option will move the copied database to a new location, and will maintain the original database, in its original version; however, the original database will not be connected to Web TimeOff once the upgrade is complete.

Moving (copying) the database is beneficial if you want to create the database on a different server or database instance from the existing Web TimeOff installation. You can also move the database and reconnect it at a later time; however, the installation will handle all configuration options if you choose to do it now.



Once you have chosen a database option, select **Next**. If you have selected **Leave database**, skip to [Step 9](#) on page 13. If you selected **Move database**, continue to [Step 7](#) on the next page.

8. If you selected **Microsoft SQL Server** in the previous step, you must now define your SQL Server settings. Select the appropriate SQL Server instance from the dropdown list provided. The Web TimeOff database will be installed in the selected instance.

Choose whether you want to use Windows Authentication to verify that you have the necessary administrator access to create a new database. This option is useful if you are installing Web TimeOff using a Windows account that already has administrator access. If the Windows account does not have administrator access, uncheck this option and enter a valid administrator login and password. The instance you selected for the installation must support Windows authentication and the Windows account being used must have access to that instance.

The screenshot shows a dialog box titled "Replicon Web TimeOff Installation" with a sub-header "Microsoft SQL Server Configuration". The main text reads: "Please define your Microsoft SQL Server settings." To the right is the "webTIMEOFF" logo. Below this, instructions state: "Specify your Microsoft SQL Server, and an administrative login name and password. If you choose Windows Authentication setup will use your credentials to connect to the SQL Server. Setup will create the database, and a database user." The form contains a dropdown menu for "SQL Server:", a checked checkbox for "Use Windows Authentication", and text input fields for "Login Name:" and "Password:". At the bottom, there are buttons for "Advanced", "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

The installation wizard automatically applies a default database name (WebTimeOff) and database login (ResourceUser); however, you can override these defaults using the Advanced Server Configuration screen as described on the next page.

Once you have entered the necessary configuration settings, select **Next** to continue.

Advanced Server Configuration

To access the Advanced Server Configuration screen, select **Advanced**. Now enter the following information:

- SQL Server
Select the appropriate SQL Server instance from the dropdown list provided. The Web TimeOff database will be installed in the selected instance. If the instance you wish to use is not listed, you may type it in the provided field. The selected SQL Server instance name is placed in the Gentle.config file in the application installation root directory under the DefaultProvider, ConnectionString – data source attribute.
- Database
Database is the name you wish to assign the new Web TimeOff database. The specified database name is placed in the Gentle.config file under DefaultProvider, ConnectionString – initial catalog.
- Login Name
The Login Name is a new user id, different from the user id Web TimeOff creates by default. This new user id allows the administrator the flexibility to enforce in-house security policies and user id naming conventions. The login name specified is stored in the Gentle.config file under DefaultProvider, ConnectionString – user id, and is not encrypted in this file. Access to the Gentle.config file should be restricted to Administrators and the ASPNET account only.
- Password
Password is the password associated with the specified Login Name. This password allows the administrator to enforce in-house security policies regarding passwords. The password specified is placed in the Gentle.config file under DefaultProvider, ConnectionString – password, and is not encrypted. Access to the Gentle.config file should be restricted to Administrators and the ASPNET account only.

The screenshot shows a Windows-style dialog box titled "Replicon Web TimeOff Installation" with a close button in the top right corner. Below the title bar, the text "Microsoft SQL Server Configuration" is displayed in bold, followed by the instruction "Please define your Microsoft SQL Server settings." To the right of this text is the "webTIMEOFF" logo, which features a stylized blue and yellow icon of a person and the text "webTIMEOFF".

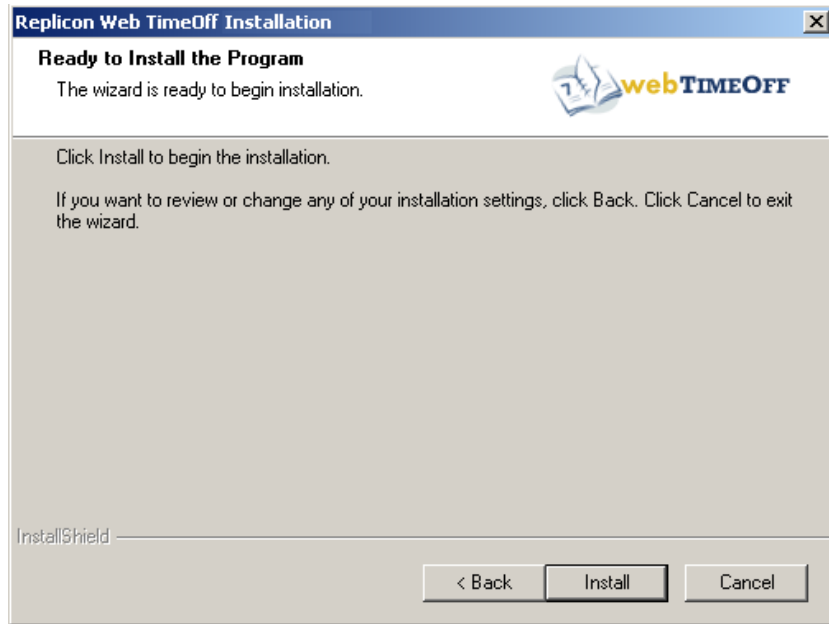
The main area of the dialog contains the instruction: "Specify your Microsoft SQL Server, database name, login name, and password. The specified user must have database-owner rights for the specified database." Below this instruction are four input fields:

- SQL Server: A dropdown menu.
- Database: A text input field.
- Login Name: A text input field.
- Password: A text input field.

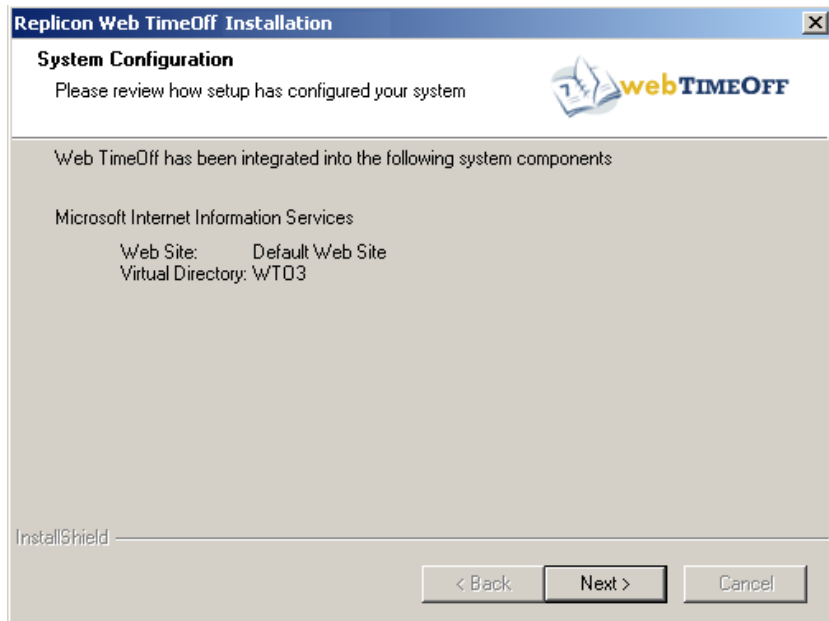
At the bottom left, the text "InstallShield" is visible. At the bottom right, there are three buttons: "Simple", "< Back", and "Next >", and a "Cancel" button.

When you are ready to proceed with the installation, select **Next** to complete the installation process.

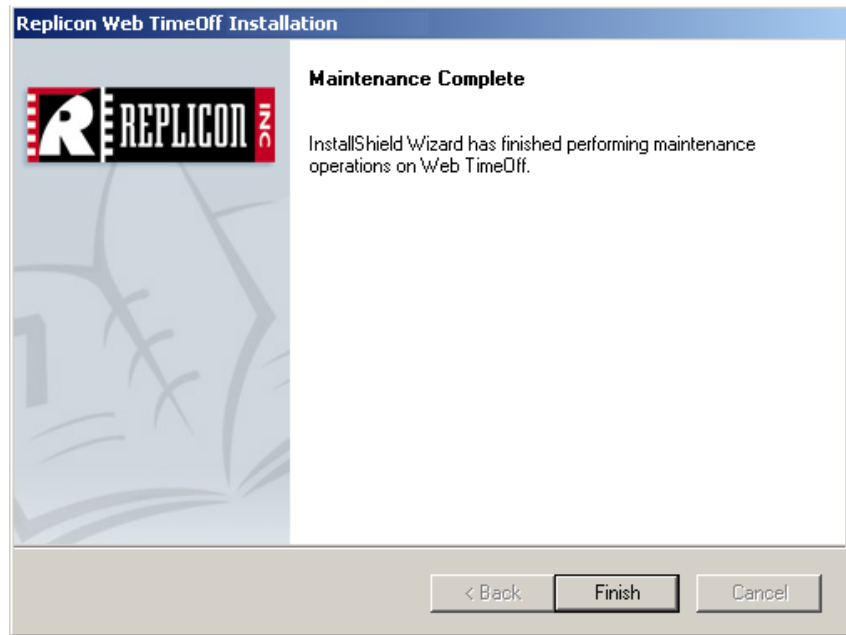
9. You are now ready to install Web TimeOff. Select **Install** to begin the installation process.



10. Once complete, a summary of the installation information is provided. Select **Next** to continue.



11. Select **Finish** to exit the installation program.



12. If Web TimeOff was configured to use **Built-in Authentication** prior to the upgrade and is now configured for **Integrated Windows Authentication**, access Web TimeOff and change the **User Name** for each employee to match their Windows user name. Until this is complete, users will not be able to log in to the system.

Note: If you did not change the **User Name** for the system administrator prior to changing the authentication method and can no longer access Web TimeOff as a result, contact Replicon's Support team for assistance in changing the system administrator's **User Name**.

If you switched from **Integrated Windows Authentication** to **Built-in Authentication** during the upgrade, be sure to inform users they can now log in using the same **User Name** used to access Windows and the **Password** password. Ensure users change their password immediately upon accessing the system.

What the Upgrade Process Does Not Support

You cannot downgrade your installation. Once the data has been moved to the new Web TimeOff version 1.6 structure, it cannot be moved back to a previous version. You can use the move database feature of the upgrade process to preserve the structure and data of the existing installation if you are concerned about the structure changes. If you have tied external processes to the database, these processes will have to be changed to support the new structure.

You cannot upgrade from multiple installations into a single installation. You can use the SQL Server data transformation services to move data from multiple databases into a single database. First, choose a site to be the master and upgrade it to 1.6. Upgrade all other installations to 1.6 to ensure that the database structures match. Use SQL Server data transformation services to move data from each installation into the master.

Frequently Asked Questions (FAQs)

Should I uninstall previous versions of Web TimeOff to upgrade to 1.6?

You should not uninstall previous versions of Web TimeOff as this will remove your license file from the system. The upgrade procedure is designed to use an existing Web TimeOff installation.

If you uninstalled the previous version accidentally your data should still be preserved. The uninstall process does not remove the database from SQL Server, so the data is not lost.

Can I move the Web TimeOff database after installation?

The database can be disconnected and moved to another SQL Server instance after installation. Ensure that the Web TimeOff database user account is created once the database is moved. The account information is stored in the connection string of the gentle.config file.

What if I have the full version of a previous Web TimeOff release installed along with the demonstration version of Web TimeOff 1.6?

The upgrade process allows you to choose which installation to upgrade. The previous full version and the 1.6 demonstration version cannot be upgraded together into a single 1.6 full installation.

Can I upgrade over the network?

The install must be run on the PC that you are upgrading. If the database resides on another machine (e.g. database server), the installation will upgrade the database remotely. A previous Web TimeOff database on one server can be upgraded to a Web TimeOff 1.6 database on another server using the move database feature of the upgrade process.

What security settings does Web TimeOff require?

- Database Security

Web TimeOff uses a special database account to access the database. This account requires the database owner role on the WebTimeOff database. The account login and password must be in the Gentle.config file in the Web TimeOff installation directory.

- Windows Security

Web TimeOff is a .Net Web application and uses IIS as the web server. Therefore, the application runs through the ASP.NET worker process as the ASPNET user. The ASPNET user account must have access to the Web TimeOff installation directories and to SQL Server. This is configured during installation.

Can I run Web TimeOff against Microsoft Access?

Only the demonstration version supports Microsoft Access. Due to scalability issues, Microsoft Access is not supported with the full version of Web TimeOff.