

# Abila MIP



## Human Resource Management Installation Guide

abila™

This is a publication of Abila, Inc.

Version 2019.x

© 2018 Abila, Inc. and its affiliated entities. All rights reserved.

Abila, the Abila logos, and the Abila product and service names mentioned herein are registered trademarks or trademarks of Abila, Inc. or its affiliated entities. All other trademarks are the property of their respective owners.

# Contents

---

Chapter 1: Getting Started .....	1
Chapter Overview .....	1
Before You Begin .....	2
System Requirements .....	2
Chapter 2: New Users - Installation .....	3
Installing HR Management .....	3
Chapter 3: Existing User - Upgrading .....	7
Upgrading from a Previous Version .....	7
Chapter 4: HR Notifications Install .....	10
Installing HR Notifications .....	10
Setting Up HR Notifications .....	11
Email Log .....	15
Chapter 5: Uninstalling HR Management .....	17
Steps to Uninstall HR Management .....	17
Steps to Uninstall HR Notifications .....	17
Chapter 6: HR Documentation .....	18
Accessing Documentation .....	18
Chapter 7: Supplemental Maintenance .....	19
Backing Up Organization Database .....	19
Restoring the Organization Database .....	20

# Chapter 1: Getting Started

---

This guide includes combined instructions for both New and Upgrade installations of the Abila MIP Human Resources (HR) Management Module.

## New Installation Scenarios

HR Management must be installed on every workstation that needs to access the HR module. Abila MIP workstation is required and must be installed and accessed at least once prior to installing HR Management. There is no need to install the HR module on the network server or on the Abila MIP server unless they are also a workstation.

## Upgrade Installation Scenarios

- You are upgrading an existing standalone or network installation. Your installation will upgrade if you have a previous version installed.
- See [Chapter 3](#) for specific information regarding existing users.

## Chapter Overview

This guide takes you through the Human Resource Management module installation. You will learn specific information about this component and how to install/upgrade it.

### The chapters in this guide are outlined as follows:

**Chapter 1: Getting Started** - This chapter outlines important information and procedures that need to be performed before running the installation programs. Read this chapter before installing.

**Chapter 2: New User - Installation** - Includes specific instructions about installing and running the HR Management program.

**Chapter 3: Existing User - Upgrade** - Includes useful procedures for existing users who are upgrading from a previous version of HR Management.

**Chapter 4: HR Notifications - Installation** - includes specific instructions about installing and running the HR Notifications program

**Chapter 5: Uninstalling HR Management** - Outlines how to uninstall the HR Management program.

**Chapter 6: HR Management Documentation** - Provides instructions about accessing the HR Management documentation.

**Chapter 7: Supplemental Maintenance** - Provides instructions about backing up and restoring your Abila MIP database, which is also your HR Management database.

## Before You Begin

**For optimum results, perform the following tasks before running the installation program:**

1. Verify that your current system environment meets the latest system requirements. See [System Requirements](#) for more information.
2. Verify that you have Abila MIP, as well as, the Payroll or Payroll Link module installed (and have accessed the system at least once). These are required to be able to install the HR Management module.
3. After Windows has restarted, shut down any applications that have opened at startup. Additionally, you may need to disable some applications, such as Norton Antivirus®.
4. Before you begin the HR Management install, you must ensure the following:
  - The user logged on to the workstation must be a member of the Local Administrators group and should be the same user as the person who will be using the product.
  - **Windows 7, 8.1, or 10 Users:** Each workstation has at the very least write access to the “ProgramData” folder--<local drive letter:>\ProgramData.
  - HR Management cannot install successfully without the Abila MIP Share folders and corresponding access rights.
  - Access to the email sent to you by Abila to download the necessary files related to the Abila HR Management Install.

After performing these steps, you are ready to run the Installation program.

## System Requirements

The latest system requirements are available on the [Abila website](#). You should meet or exceed the Abila MIP system requirements for the Abila HR Management module.

**Important!** Our System Requirements have changed; SQL Server 2008 is **no longer supported**. Please verify that you are using an acceptable SQL Server version.

## Chapter 2: New Users - Installation

---

This chapter describes the installation process for HR Management. You must have the Abila MIP workstation installed (and accessed at least once) on each workstation that will be installing HR Management. The download file contains the executables (SETUP.EXE and SETUP.MSI) for the HR Management installation and you must use Internet Explorer as your browser.

### Installing HR Management

This section describes the installation process for the HR Management module. Please carefully read each panel of the wizard during installation.

---

#### Notes:

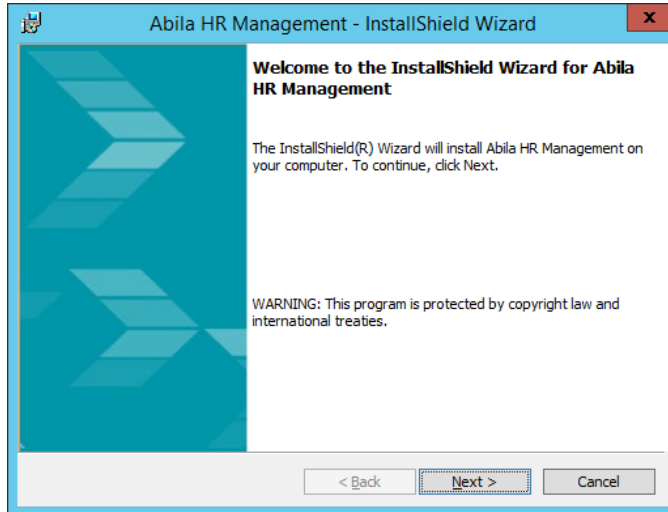
- Remember that the latest version of Abila MIP must be installed before installing HR Management.
  - Also, if both the Abila MIP and HR Management software are installed on this workstation, the Abila MIP Navigation Pane has a link to the HR Management system. When the link is clicked HR Management opens in a separate window to the logon screen.
- 

1. Be sure you are logged in as a user who has local administrator rights to perform the install. Also, verify that you are a user with Administrator rights on the SQL Server or have access to the SQL Server System Admin (SA) password. (If you are not an Administrator on the SQL Server nor have the SA password, you will not be able to install the software.)
2. Open the email sent to you by Abila and click the download link to the latest HR Management file.
3. A File Download - Security Warning form displays. Click **Save** to save this application in a location of your choice.
4. Extract the saved file to a location on the workstation and open the folder in Windows Explorer.
5. Right-click the **Setup.exe** file and select **Run as administrator** to start the installation wizard.

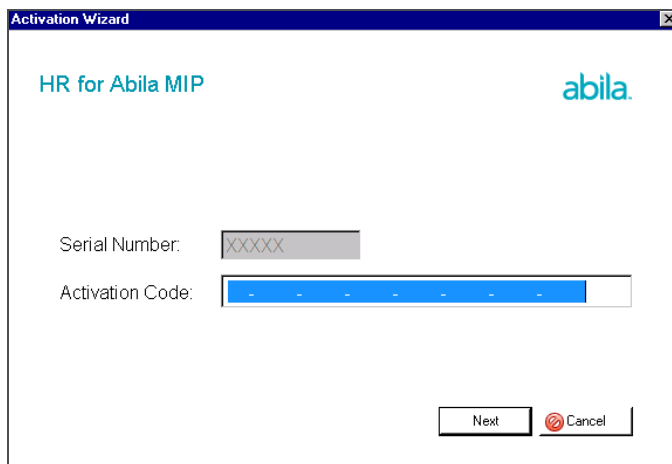
**Important! Windows OS Users:** If the User Account Control is turned on, a message displays: "Do you want to allow the following programs to make changes to this computer?" Click **Yes** to proceed.

---

6. The Abila HR Management InstallShield Wizard prepares to install. The Welcome panel displays.



7. Click **Next** to confirm the installation and follow the instructions in the installation wizard. The system automatically downloads files to your hard disk. Or, click **Cancel** to exit the installation process.
8. Click **Install** to begin. Use the **Back** button to make changes or click **Cancel** to exit the installation process.
9. Once the Installation is complete, click **Finish**.
10. Double-click the HR Management icon, located on your desktop, and enter the activation code you received when you purchased the HR Management module, and click **Next**.



11. After you enter your activation code, an Employee License Allocation panel displays.

12. Verify the HR Count and EWS Count for the Abila MIP Database Name. You may need to arrange the counts if other databases are owned and used or if you are using it for select processing groups.
13. Click **OK** to close the panel.
14. You will be prompted to log in.

The screenshot shows a dialog box titled "Abila HR Management". It has a blue title bar with a close button (X) on the right. The dialog is divided into two main sections. The first section, "User Information", contains a user icon, a "User:" label, and a text input field. Below it is a key icon, a "Password:" label, and another text input field. The second section, "Select an Organization", contains a building icon, a dropdown menu with "NTD" selected, and a downward arrow. At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

- Enter the user ID and password provided to you by Abila when you purchased the product. If you do not know the user ID and password, contact your business care representative or the Abila Professional Services (PSG).
  - For the Select an **Organization**, accept the default or select another Abila MIP organization database from the drop-down list.
15. Click **OK**.
  16. If this is the first workstation to receive the installation, a message displays “Do you want to add HRMS to this database?” Click **Yes**, to connect the HR Management tables to your organizational database.

The new HR Management module is now installed and connected to your Abila MIP database.

**Note:** Remember, the HR Management installation must be performed on each workstation that needs to run HR Management.

**Important!** If you own the Abila Employee Web Services module, you must perform a separate upgrade for it as well. It is recommended that you perform both updates (to HR Management and EWS) at the same time.



17. Optional, install Abila HR Notifications on your workstation. For more information, see [HR Notifications Install](#).

## Chapter 3: Existing User - Upgrading

---

Use the information in this chapter to upgrade an existing installation of HR Management. It explains how to check for updates for the existing version if the software was downloaded using Internet Explorer.

### Upgrading from a Previous Version

This section describes the upgrade process for the HR Management module. Please carefully read each panel of the wizard during installation.

---

#### Notes:

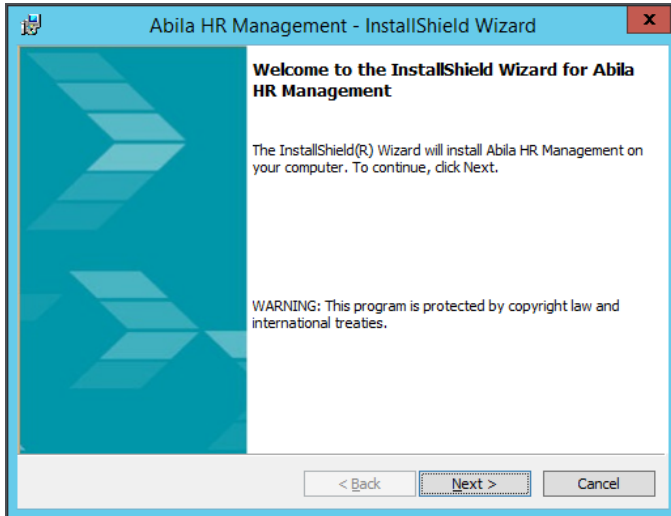
- Remember that the latest version of Abila MIP must be installed prior to installing HR Management.
  - Also, if both the Abila MIP and HR Management software are installed on this workstation, the Abila MIP Navigator Pane has a link to the HR Management system. When the link is clicked HR Management opens in a separate window to the logon screen.
- 

1. Be sure you are logged in as a user who has local administrator rights to perform the install. Also, verify that you are a user with Administrator rights on the SQL Server or have access to the SQL Server System Admin (SA) password. (If you are not an Administrator on the SQL Server nor have the SA password, you will not be able to install the software.)
2. Uninstall HR Management.
  - a. Go to **Start>Settings>Control Panel**.
  - b. Click **Programs and Features**.
  - c. Select **Abila HR Management**, and then click **Uninstall**.
3. Open the email sent to you by Abila for the new version of HR Management and click the download link.
4. A File Download - Security Warning form displays. Click **Save** to save the zip file to the workstation.
5. Extract the saved file to a location on the workstation and open the HR folder in Windows Explorer.
6. Double-click the **Setup.exe** file to start the installation wizard.

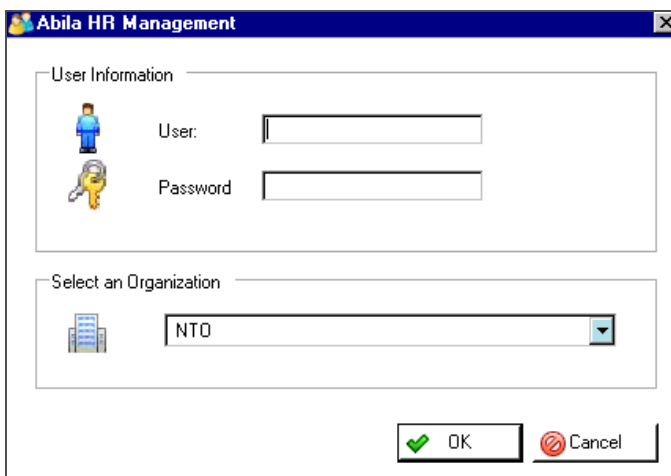
**Important! Windows OS Users:** If the User Account Control is turned on, a message displays: "Do you want to allow the following programs to make changes to this computer?" Click **Yes** to proceed.

---

7. The Abila HR Management InstallShield Wizard prepares to install. The Welcome panel displays.



8. Click **Next** to confirm the installation and follow the instructions in the installation wizard. The system automatically downloads files to your hard disk. Or, click **Cancel** to exit the installation process.
9. Click **Install** to begin, use the Back button to make changes or, click Cancel to exit the installation process.
10. Once the Installation is complete, click **Finish**.
11. If HR Management does not automatically launch, you can double-click the desktop icon to open the application. The application prompts you to sign in.



- Enter your user ID and password. If you do not know the user ID and password, contact your business care representative or the Abila Professional Services (PSG).

- For the Select an **Organization**, accept the default or select another Abila MIP organization database from the drop-down list.

12. Click **OK**.
13. A message displays, Do you want to upgrade your HR Management database to version 2019.x?
14. Click **Yes** to begin the upgrade process.

The upgraded HR Management module is now installed and connected to your Abila MIP database.

**Note:** Remember, the HR Management installation must be performed on each workstation that needs to run HR Management.

**Important!** If you own the Abila Employee Web Services module, you must perform a separate upgrade for it as well. To upgrade EWS, you must uninstall the existing version and reinstall the updated software version. It is recommended that you perform both updates (to HR Management and EWS) at the same time.

15. Optional, install Abila HR Notifications on your workstation. For more information, see [HR Notifications Install](#).

# Chapter 4: HR Notifications Install

---

This chapter describes the installation process for HR Notifications. You must have the Abila MIP and the HR Management systems installed. The download file contains the executables (SETUP.EXE and SETUP.MSI) for the HR Notifications installation.

## Installing HR Notifications

This sections described the installation process for the HR Notifications module. Please carefully read each panel of the wizard during installation.

---

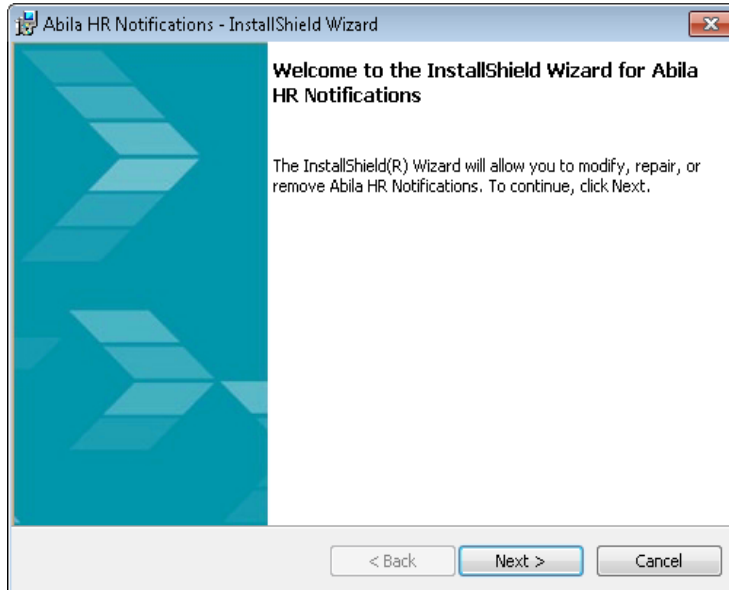
**Note:** Remember that the latest version of Abila MIP and HR Management must be installed prior to installing HR Notifications.

---

1. Open the HR Management module, using the Help menu, click on Download HR Notifications. This opens your web browser to the HR Notifications for 2019.x page on the Abila Knowledgebase. You must login and have a current support plan, in order to click the link to download the file.
2. A File Download - Security Warning form displays. Click **Save** to save this application in a location of your choice.
3. Extract the saved file to a location on the Abila MIP or EWS server and open the folder in Windows Explorer.
4. Right-click the **Setup.exe** file and select **Run as administrator** to start the installation wizard.

**Important! Windows OS Users:** If the User Account Control is turned on, a message displays: “Do you want to allow the following programs to make changes to this computer?” Click **Yes** to proceed.

5. The HR Notifications InstallShield Wizard prepares to install. The Welcome panel displays.



6. Click **Next** to confirm the installation and follow the instructions in the installation wizard. The system automatically downloads files to your hard disk. Or, click **Cancel** to exit the installation process.
7. Click **Install** to begin. Use the **Back** button to make changes or click **Cancel** to exit the installation process.
8. Once the Installation is complete, click **Finish**.

You will need to click the Abila HR Notifications icon located on your server's desktop, to open the application and complete the HR Notifications setup.

**Note:** If you get an error message when you open HR Notifications. Simply, right-click the HR Notifications icon and select Properties. On the Compatibility tab, under the Privilege Level section, select the **Run this program as an administrator** check box. Click OK and open HR Notifications again.

## Setting Up HR Notifications

Access this form using the  HR Notifications icon on the desktop.

Use this form to set up and send HR Notifications using email on a scheduled basis. Once HR Notifications is connected to your SQL Server and Abila MIP database, you can set up and send email notices in 10 minute to 12 hour intervals. These notices could include on-boarding and termination assigned

to employees but maintained on Maintain>HR Processes, EWS employee leave requests, and EWS timesheet submissions.

HR Notifications should to be left running at all times on the server machine. The timer is stopped when the server is stopped and restarts after the server is started on to the machine.

---

**Note:** If you will get an error message when you open HR Notifications. Simply, right-click the HR Notifications icon and select Properties. On the Compatibility tab, under the Privilege Level section, select the **Run this program as an administrator** check box. Click OK and open HR Notifications again.

---

## Procedures

1. Enter the SQL Server information and the Abila MIP Database name, and click the **Connect** button. Click **OK** to dismiss the Connection Complete message.
2. If available, the system defaults to the SMTP Email information previously entered in the Abila MIP Administration module (Administration>Organization>Organization Information - Set Up SMTP Email Tab). Otherwise, enter the SMTP Email information and click the **Test Email** to verify connection. Look in your in box for the email from your system.
3. Once the SQL Server and SMTP Email are setup and running, begin selecting the notification options. Select the check box to activate the notification options, and clear the check box to deactivate. You can always modify your selections but you will need to click the **Update Options** button after wards.
4. Next, schedule how often you want to the system to check for notifications and send them out. Simply click the **Stop** button in the Scheduling group box, in order to modify the start date and time and the email interval in minutes.
5. Once your defaults are set, click the **Save** button.
6. Click the **Start** button to begin checking for notifications to be sent. Once the **Start** button is clicked, click **OK** to acknowledge the Timer is started message, and the form will minimize to the task bar. The system begins checking the Email Log and starts sending emails.
7. Click the **Email Log** button to view the notifications that have been created and if the email or notification has been sent. If an error occurs, you can view the error message.

## Fields

**SQL Server:** Complete the following information and click the Connect button. You must enter the SQL Server information to successfully connect the HR Notifications with the SQL Server and Abila MIP Organization Database.

- **Server Name:** Enter the Server Name for your organization's SQL Server.
- **User:** Enter the System Administrator's user name.
- **Password:** Enter the System Administrator's password.
- **Database:** Enter the name of the Abila MIP organization's database.
- **Connect:** Click this button to connect the HR Notifications with the SQL Server and Abila MIP Organization Database. Once the connection completes, a message displays; click OK to close this message.

**Scheduling:** Complete the following to specify when and how often the HR Notifications contacts the Abila MIP server to check the Email Log for any new notifications before sending out email notices. With the Scheduling Stopped, you can modify the start date and time and the email interval in minutes. To begin checking the Email Log, sending emails, and minimize the HR Notifications form, click the Start button.

- **Start Date and Time:** Accept the default start date and time or enter the time and date when HR Notifications checking the Email Log and sending new emails.
- **Email Interval in Minutes:** Specify how often HR Notifications should check the Email Log between sending new emails. The time interval must be in minutes from 10 to 720.
- **Process Count:** This is the number of times HR Notifications has checked the Email Log for any new emails.
- **Start:** Click this button to begin checking the Email Log and start sending emails. Once the **Start** button is clicked, click **OK** to acknowledge the Timer is started message, and the form will minimize to the task bar. The system begins checking the Email Log and starts sending emails.
- **Stop:** Click this button to stop sending emails. After the scheduling has stopped, you can make modifications to the start date and time and the email intervals in minutes. Also, notifications will still be created if the check boxes for the notification options are checked. Note that you will need to click the **Start** button to resume sending emails.

**SMTP Email Setup:** Enter the following information to configure the SMTP (Simple Mail Transfer Protocol) connection for emailing HR Notifications. This is required to send emails from HR Management and EWS.

**Note:** Once you are connected to the HR Notifications module, The SMTP Email Setup section will display your Abila MIP SMTP Email information (Administration>Organization>Organization Information - SMTP Email Tab), if it was previously configured.



- **Server:** Enter the server name of the SMTP service used to process outgoing email, for example SMTP.gmail.com
- **User:** Enter the user name associated with the SMTP service.
- **Password:** Enter the User's password.
- **Port:** Enter the port that accepts outgoing mail requests. This port number should match the port configured on your SMTP service. By default, the system displays 25 as the port number.
- **Enable SSL:** If your SMTP service supports SSL (Secure Sockets Layer), select this check box to securely send email notifications.

---

**Note:** The HR Notifications emails for HR Processes will be sent using the HR Contact's email address. The Timesheet Submitted and Leave Requests will be sent using the employee's email address. You can view and/or change the HR Contact From email address in the Options group box or on the HR Management>Options>Settings>System Preferences form.

---

- **Test Email Address:** The **From** and **To** addresses will be used when the **Test Email** button is clicked. It is recommended that you test the SMTP Connection to make sure the information was set up correctly.
  - **From:** Enter an email address to test where the email is coming from. If the email fails, this is the address that will receive the failure notification.
  - **To:** Enter an email address to test where the email will be received. If the email is successful, this is the address that will receive the test email.
  - **Test Email:** Click this button to test the email connection. If you entered From and To email addresses, the system will use them to test the connectivity with the Server. If the From and To email address fields are left blank, no test will be conducted.

---

**Note:** We recommend referring to your IT Technical or System Administrator for help completing the SMTP Email Setup information.

---

**Options:** Select the options below to have the HR Notifications create emails and to view and/or change the HR Contact From email address.

- **Notify when Add record in HR Processes:** Select this check box to be notified when Send Email is selected in the HR Processes tab and it is added to an employee's record. If you want to deactivate it, clear the check box and click the Update Options button.

- **Notify when Add record in Leave Request:** Select this check box to be notified when an employee in the EWS module submits a leave request. If you want to deactivate it, clear the check box and click the Update Options button.
- **Notify when Add Record for Timesheet Submission:** Select this check box to be notified when an employee in the EWS module submits a timesheet. If you want to deactivate it, clear the check box and click the Update Options button.
- **HR Contact From Email Address:** The HR Contact email address displays, which is used for HR Process notifications. The HR Contact information is located on the HR Management>Options>Settings>System Preferences form.
- **Update Options:** Click this button to update your notification option changes in the system.

**Email Log:** Click this button to open the Email Log form and view all email notification that have been attempted. For more information, see "[Email Log](#)" (page 15).

**Save:** Click this button to save your default settings.

## Email Log

Access this form using the Email Log button on the HR Notifications form.

Use this form to view the types of HR Notifications being sent through the system.

Highlight the row to delete. This log is modifiable and can be changed. If you clear the Email sent check box, the message can be sent again within the next email interval.

## Fields

**Email Log Table:** The system displays the records by type, the associated Employee ID, the TypeID, the Task ID, the Subject and Message, and to whom the notice was sent and from. Also included is the date the notice was sent, if the email was sent, who created it, if there was a send error and what associated error message, if applicable.

- **Record Type:** The system displays the record type.
- **Employee ID:** The system displays the associated employee ID.
- **Type ID:** The system displays the record type ID.
- **Task ID:** The system displays the task ID.
- **Subject Text:** The system displays the subject line of the notification.

- **Message Text:** The system displays the message included in the notification.
- **Sent Address:** The system displays the To email address - to whom the notice was sent.
- **From Address:** The system displays the From email address - who the notice was from.
- **Send Date:** The system displays the date the notice was created or will be sent.
- **Email Sent:** The system displays if the email notice was sent. If the check box is not selected, the notice has not been sent.
- **Created:** The system displays the user who created the email notice.
- **Send Error:** The system displays if there was an error trying to send the notice. If the check box is selected, an error message will also display.
- **Error Message:** The system displays an error message if the Send Error check box was selected.

# Chapter 5: Uninstalling HR Management

---

This chapter describes how to uninstall the HR Management and HR Notifications modules.

## Steps to Uninstall HR Management

1. Go to **Start>Settings>Control Panel**.
2. Click **Add or Remove Programs** or **Programs and Features**, depending on your Windows version.
3. Select **Abila HR Management**, and then click **Uninstall**.
4. Click **Yes** to confirm you want to uninstall the product.

## Steps to Uninstall HR Notifications

1. Go to **Start>Settings>Control Panel**.
2. Click **Add or Remove Programs** or **Programs and Features**, depending on your Windows version.
3. Select **Abila HR Notifications**, and then click **Uninstall**.
4. Click **Yes** to confirm you want to uninstall the product.

# Chapter 6: HR Documentation

---

This chapter describes how to access the HR Management documentation.

## Accessing Documentation

The *HR Management Human Resource Management Installation Guide* is available for download on the [Abila Knowledgebase](#). The help files and product manuals are also automatically installed as part of the Installation process. Therefore, documentation is now easily accessible to all workstations through the **Help>Contents**, **Help>Index**, or **Help>Manuals** on the main menu.

- The online help is an easy way to get help when you need it most. On a form, you can press the F1 key to display the Online Help information for that form. There is a wealth of information available that you can use daily to help you in your work. By experimenting with online help, you learn to use the system quickly, effectively, and efficiently.
- Some product guides are available in PDF format. You can access these PDF files using **Help>Manuals**. These PDF files can be viewed and printed using a program, such as the Adobe® Reader®. To install Adobe Reader, you can download it for free from <http://www.adobe.com/>.

# Chapter 7: Supplemental Maintenance

---

The following information is useful for backing up and restoring your Abila MIP database which is also your HR Management database.

## Backing Up Organization Database

You can back up and restore all organization databases and the system database (NPSSQLSYS) for the current version. When running a backup, the system creates an uncompressed copy of the database.

**You can back up any database while users are in the system. However, to restore a database, all users must exit the system.**

1. As the Administrator, log on to MIP Fund Accounting (Start>All Programs>Abila>MIP). You do not have to select an Organization. Note that the HR Management, Employee Web Services, and HR Notifications modules do not have the Backup form however, they share the Abila MIP database and their information will be included in this process.
2. Open the **File>Backup** form.
3. Select the database you want to back up from the **Database to Backup** drop-down list.
4. Accept the default name (the database name, date, and time) or enter another name in the **Backup to File** box.
5. If needed, click the **Browse** button and select the backup directory.
6. Click the **Start** button. The system backs up the database.
7. A dialog box will indicate the location of the backup when the process is finished.

## Restoring the Organization Database

1. As the Administrator, log on to MIP Fund Accounting (Start>All Programs>Abila>MIP). You do not have to select an Organization.
2. Open the File>Restore form.
3. Select the database to restore from the drop-down list. If this is the first time a database has been restored, its name is not available in the drop-down list; you must enter a name here.
4. Enter the name in the Restore to File box.
5. Click the Browse button to locate the file.
6. Click the Start button.

---

**Tip:** The databases must have been previously backed up using File>Backup; if data was backed up using other software, the file cannot be restored using this form.

---