

## The Upgrade Order

SOLUS3 (SIMS Online Upgrade Service) improves the efficiency of your SIMS, Discover and FMS upgrades. The upgrade process takes responsibility for upgrading all SIMS, Discover and FMS server components, as well as any workstations that have been configured with workstation agents.

Customers who are using SLG, InTouch and Partnership Xchange (PX) must upgrade in the following order:

1. **SIMS Learning Gateway** - details on how to obtain a release are sent via email after the release has been authorised. The SIMS Learning Gateway release must be applied **before** applying the SIMS release.
2. **InTouch** - an update to InTouch is applied to your InTouch installation automatically via SIMS Services Manager and should not require user interaction. The InTouch release must be applied **before** applying the SIMS release.
3. **Partnership Xchange** - an update to PX is made available to ensure compatibility with the SIMS release. Details on how to obtain a release are sent via email after the release has been authorised. The Partnership Xchange release must be applied **before** applying the SIMS release.

**WARNING:** It is essential that a SOLUS3 Agent is present on all workstations using SIMS, FMS and/or Discover.

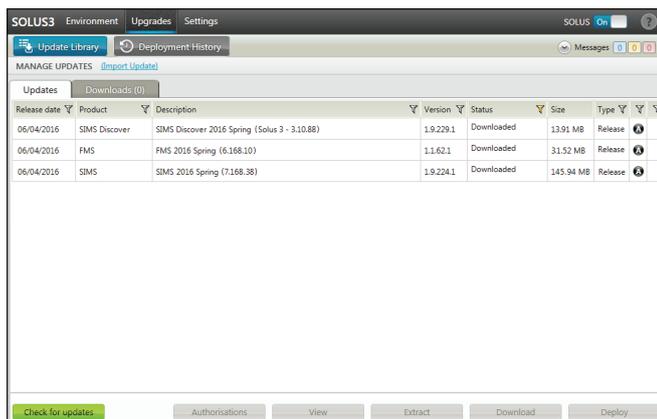
The following upgrade process uses SIMS as an example but the same process should be used when upgrading FMS or Discover.

## The Upgrade Process

### Step 1: Launching SOLUS3

**IMPORTANT NOTE:** Ensure that all users are logged out of all SIMS and FMS software before starting the upgrade process.

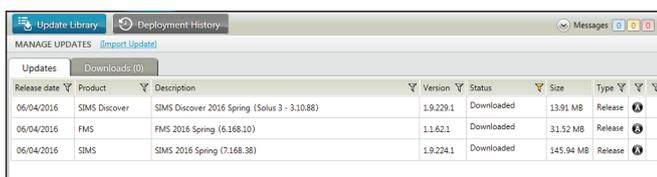
1. On the server or the computer hosting your SOLUS3 database, double-click the **SOLUS3 Deployment Server UI** icon (located on the desktop). Alternatively, select **Start | All Programs | SOLUS 3 | SOLUS 3 Deployment Server UI**.
2. When the SOLUS3 UI loads, it defaults to the **MANAGE UPDATES** page.



### Step 2: Checking for Updates

1. Ensure that the **Updates** tab is selected.
2. Click the **Check for updates** button to refresh the display. A list of current updates is displayed.

**NOTE:** The status of an update changes to **Withdrawn** if it has been removed by Capita SIMS or your LA.



On the right-hand side of each row, an **A** indicates that the update can be auto-deployed and in the adjacent column, an **R** indicates that the update can be deployed multiple times at the school.

A pop-up message displays if SOLUS3 detects any new updates.

**NOTE:** If the SOLUS3 auto-download functionality has been enabled (via **Settings | SOLUS3 - SETTINGS - Updates**), the updates might already have been downloaded.

3. If SOLUS3 finds new updates, they must be downloaded before proceeding. Select the appropriate release and then click the **Download** button. The download progress can be checked by clicking the **Downloads** tab.

Updates that have been downloaded to a device remain active for two weeks. If an update on a device is not deployed within two weeks, the device has to download the update again from the Update Repository for the Deployment Environment (DE). In contrast, updates in the Update Repository remain active indefinitely.

### Step 3: Deploying an Upgrade

Each SIMS, FMS and Discover upgrade is listed on the **Manage Updates** page. The upgrades are usually named after the school term in which they have been released, e.g. SIMS 2016 Spring or FMS 2016 Autumn. The words **Full Release** are displayed after the upgrade name, e.g. SIMS Spring 2016 Full Release.

The exact upgrade notification wording is displayed on the Capita Education Support Services Download and Support website ([www.capitaess.co.uk](http://www.capitaess.co.uk)).

1. Select **Updates | Update Library**.
2. Highlight the latest upgrade and then click the **Deploy** button to display the **Deployment History** page, where the time you want the upgrade to be deployed can be selected.

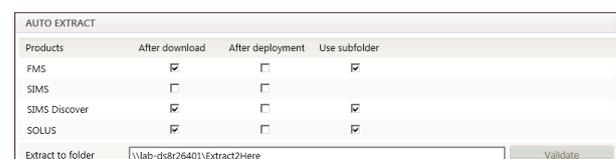


- To deploy the upgrade now, click the **Deploy now** button.
- To schedule the upgrade for a later time, enter the required **Date** (or select the required date from the calendar), enter the required **Time** and then click the **Schedule** button.

If you want to extract the installers for a particular package (e.g. SIMSApplicationSetup.exe for a SIMS release) and the extraction process has not been set up to run automatically, the process can be run manually.

Ensure that the update package has been downloaded prior to extraction.

1. Select **Settings | SOLUS3 - SETTINGS** page - **Updates** tab.
2. In the **AUTO EXTRACT** panel, enter the location to which the files should be extracted in the **Extract to folder** field. A set of files is posted to the specified folder, ready for manual installation via a setups directory.



**IMPORTANT NOTES:** The specified path must be a secure location, accessible only by authorised personnel.

If you are using a live setups folder, the **Extract to folder** should relate to the Setups folder and only the **FMS Use subfolder** check box should be selected.

3. Click the **Validate** button to check that the specified folder exists and that you have the appropriate permissions.

## Step 4: Monitoring Progress

Once the upgrade has been deployed, the progress can be monitored.

Select **Upgrades | Deployment History** to display a list of current and previous deployments.

Description	Scheduled date	Status	Stage
Solus 3 - 3.10.88	15/04/2016 12:21:05	Successful	
Solus 3 - 3.10.88	15/04/2016 12:38:50	Failed	Tolerance not met for target Solus 3 Database, deployment stopping

The deployment process is automatic and does not require any further user interaction.

The status of the deployment initially shows as **In Progress**. As each element of the upgrade is undertaken, a pop-up displays with a two minute countdown and a **Deploy Now** button.

Once the deployment is completed, the status changes to **Successful** or **Partially Successful**.

*NOTE: A status of **Partially Successful** means that the upgrade was unsuccessful on one or more of the targets (workstations), e.g. if a machine is turned off, meaning that the upgrade could not complete. In this case, SOLUS3 upgrades the machine when it is next switched on.*

SOLUS3 backs up the SIMS SQL database automatically when deploying updates. However, if the **Delete database backups at the end of this deployment** check box (located at the bottom of the **Update deployment** or **Deployment history** pages) is selected, the database backups made by SOLUS3 are deleted after a successful deployment.

*NOTE: This option can be changed when scheduling each deployment.*

If you want to keep the backups made by SOLUS3, ensure that the **Delete database backups at the end of this deployment** check box is **deselected**.

**IMPORTANT NOTE:** Although SOLUS makes backups of the databases to which it deploys updates, this is not a substitute for a regular and comprehensive database backup plan.

## Step 5: Upgrading Discover

### WARNINGS:

- It is essential that the upgrade version of Discover matches the version of SIMS currently installed.
- Once the SIMS release has been verified as **Successful** or **Partially Successful**, schools using Discover must perform steps 1 to 4 (describe previously) to upgrade Discover to a compatible release.  
*Failure to do so will result in failed Discover transfers and potential issues with backup software.*

### Discover Upgrade Check List

- Launch SOLUS UI.
- Check for updates.
- Upgrade Discover (ensure that the upgrade version of Discover matches the version of SIMS currently installed).
- Check upgrade progress.

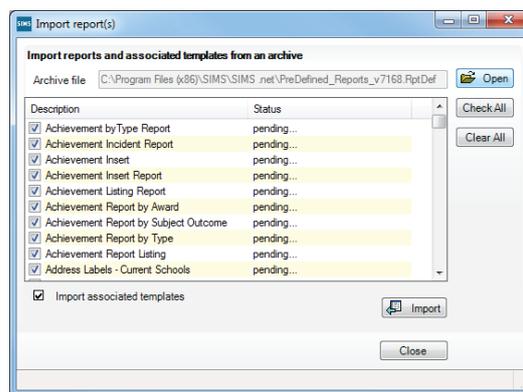
A variety of handbooks dealing with Discover are available via the Discover **Documentation Centre** (accessed from within the Discover application) or via the **Documentation** button located at the top right-hand side of the SIMS **Home Page**.

## Post Upgrade Tasks

### Importing SIMS Reports

Included in every release of SIMS is an updated set of predefined reports. To ensure your system has the latest reports available, you must import the reports using the following steps.

- Open SIMS then check what version of SIMS is currently installed by selecting **Help | About**.
- Select **Reports | Import** to display the **Import report(s)** dialog.
- Click the **Open** button then locate the SIMS installation path (typically C:\Program Files\SIMS\SIMS .net).
- Highlight PreDefined\_Reports\_<Version Number>.RptDef then click the **Open** button to return to the **Import report(s)** dialog.



- If you want to import the associated templates (e.g. Word templates), ensure that the **Import associated templates** check box is selected.
- Click the **Import** button.

### Automatic Updates for AMPARK

Applicable to users with Assessment Co-ordinator permissions only

A dialog is displayed if an update to AMPARK is available when the Assessment area of SIMS is first accessed following a software upgrade.

- Click the **Yes** button to start the update process.

**IMPORTANT NOTE:** It is recommended that Assessment users do not make changes to aspects or templates while this process takes place.

- Follow the on-screen prompts to import the AMPARK resources.

The appropriate Key Stage files are imported but the content of the import varies depending on the type of school. Primary schools have the option to import the Programme of Study Tracking Resources.

This process needs to be performed on all workstations that use the AMPARK resources.

- The display of a report of the imported material concludes the process.

### Software Links

Links to all the latest Capita SIMS software, including SIMS/FMS upgrade ISO files, are available from My Account:

<https://myaccount.capita-cs.co.uk/Notifications/SIMS-Release-Download-Links/>

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