

Upgrading Opera 3 SQL SE – Payroll

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1. Introduction

These processes steps need to be carried out by a competent IT Professional. Someone who has relevant permissions to access the Opera server, the SQL Databases, Opera SE and SAM. This also requires a level of ‘understanding’ of these elements plus the installation paths.

This process will also require the Payroll Manger to be available to make decisions on the PAYE Table Rates deployment and checks, plus to run a test for the P60s etc.

Please Note that we at Profile are extremely busy at this time of year and may not be available for support immediately if there are any issues with your upgrade.

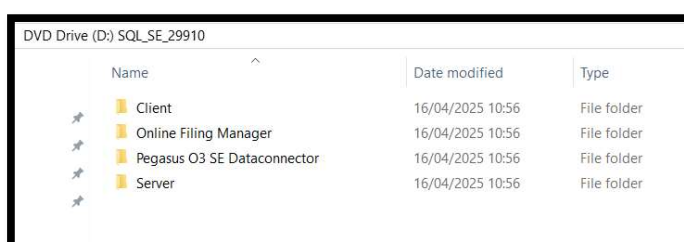
If you have any major issues then this may require us booking time off support to help you; therefore, causing delays and a possible charge.

Based on our knowledge and experience, we always recommend that we at Profile carry out upgrades.

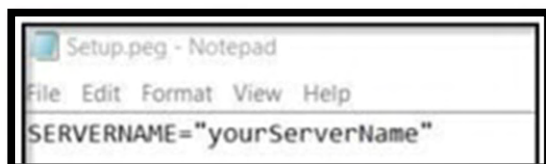
2. Downloading the software – IT Professional

Download the latest version of Opera 3 SQL SE software.

Once extracted, the downloaded software includes four folders. For upgrades we are interested in the client installation and the server installation.



- Save the downloaded software to a location where it can be accessed from the server.
- Copy the Client folder into the SE common folder. On the server this is typically located here C:\Pegasus\OperaSEData\Common\
- Open the 'Setup.peg' file using a text editor like Notepad++ or Notepad.
- On the first line, enter the name of your server in between the quotes. This is used when updating each client PC's registry to point the client installation to the server.

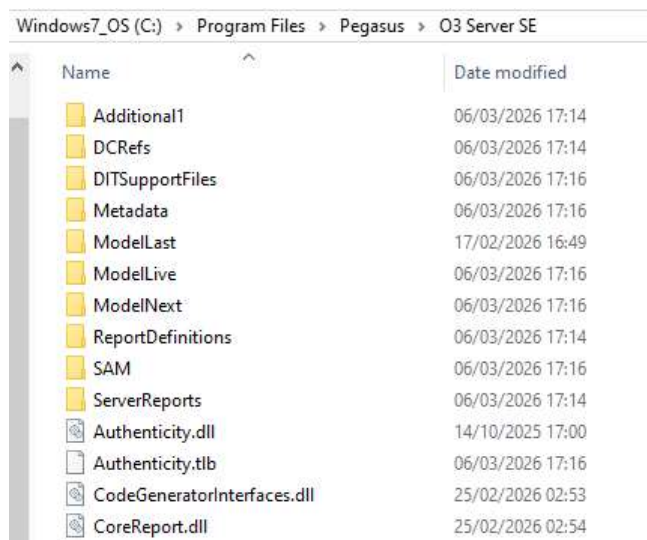


- Save the file.

NOTE: make sure that no one is using Opera 3 SQL SE before starting this process.

3. Program and Data Backups – IT Professional

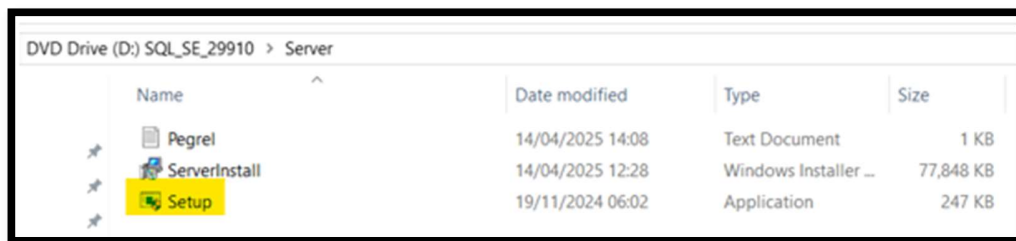
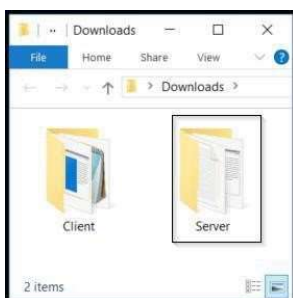
- Ensure you have a **Data** backup. You can do this from within Opera SE > System > Utilities > Backup. Do this for all companies apart from Opera’s demo company Z
- Ensure there is an Opera SE **Programs** backup too. A typical path for the programs is as follows. However, this could be different depending on the original installation paths chosen at that time.



NOTE: you may already have alternative server backup processes that include the Data and Programs to an external drive or the cloud. In which case, the above may not be necessary.

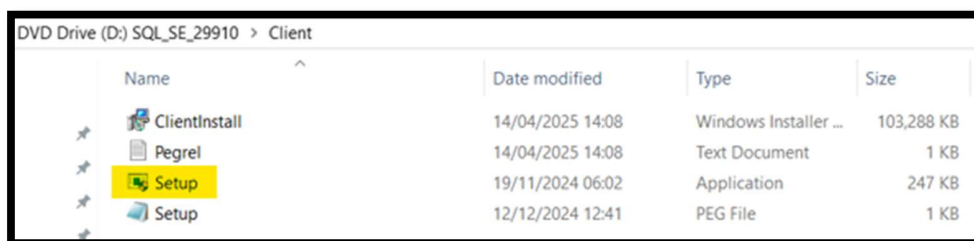
4. Installing the server software – IT Professional

- On the Opera 3 SQL SE server, run Setup.exe from the Server download folder.
- Complete the steps in the wizard setup.



5. Installing the client software on the server and client PCs

- On each Client PC browse to the common folder – e.g. \\yourservername\common\client and run the setup.exe file.



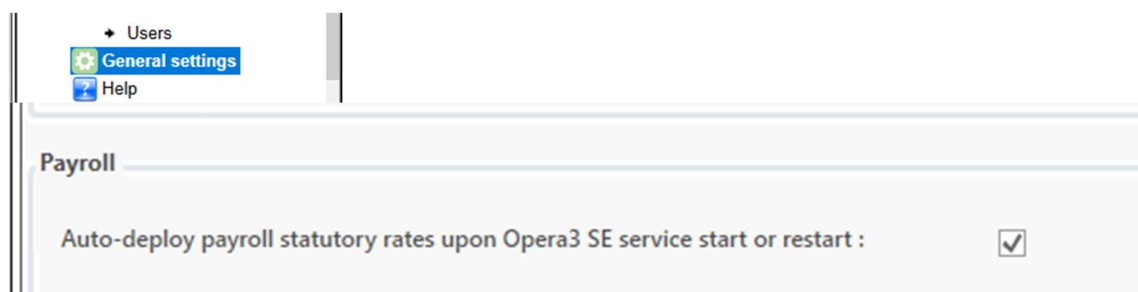
- Complete the steps in the wizard setup.
- Complete on each client PC.

6. Payroll Statutory Rates – IT Professional and Payroll Manager

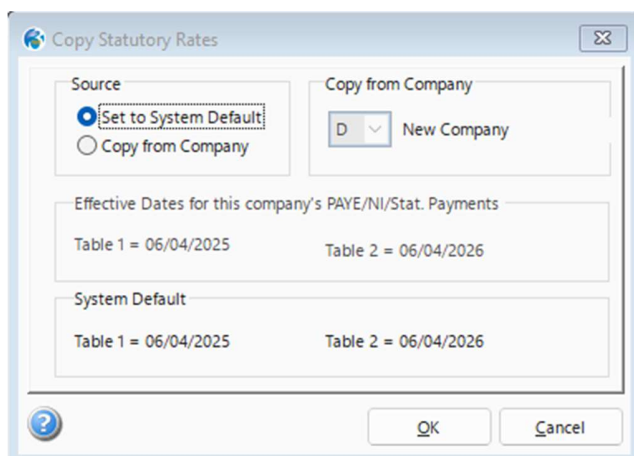
- Log into the Opera SE SAM Tool

NOTE: at this point you may be asked to enter the supplied new **Activation** for this release.

- In SAM menu go to **General Settings** at the bottom of the list, and
- Tick the **Auto-deploy payroll statutory rates upon Opera SE service start or restart**



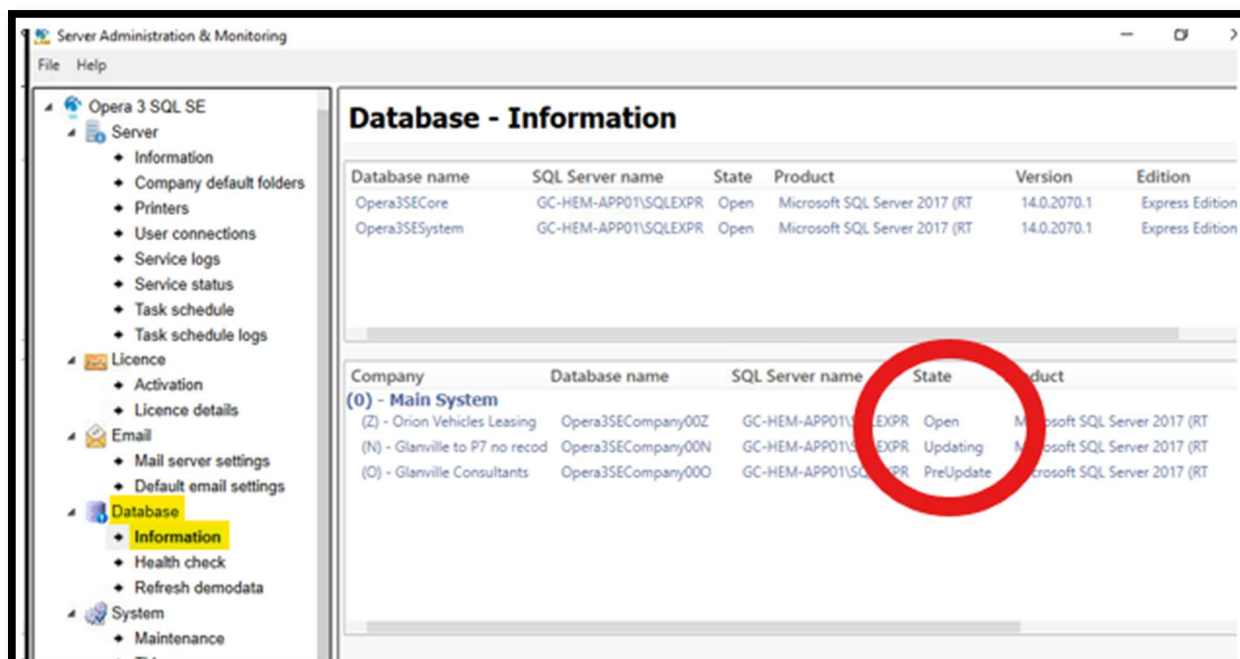
NOTE: if you choose to leave this option switched off, the Payroll Manager will later need to manually update the rates via the Payroll > Utilities > Copy Statutory Rates for each Payroll company, as below.



7. Additional Steps if bespoke is present – IT Professional

- After completing the previous steps, log into the Opera SE SAM Tool.
- Once logged in, go to External > Bespoke
- Click to highlight the first line of Bespoke and click **Prepare** then Yes.
- Then Click to highlight the first line of Bespoke and click **Apply** then Yes.
- Then log out of SAM.
- You will then need to **Stop** the following Services:
 - Pegasus Opera Service
 - Net.tcp port sharing service
 - Distributed transaction coordinator
- You will then need to **Start** the following Services:
 - Pegasus Opera Service
 - Net.tcp port sharing service
 - Distributed transaction coordinator

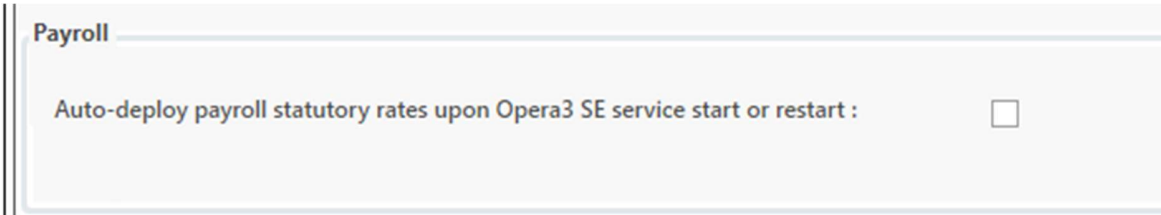
After a period (whilst the upgrade updates the tables) you will be able to log into Opera 3 SE. If you wish, you can check the status of the system updating the data by logging into SAM and selecting Database Information.



8. Checks once logged into Opera SE after the upgrade – Payroll Manager

- **P60 Year check** – run a P60 from any company to screen and ensure that the year displayed on the P60 is 2026. **If it is not, contact Profile Support.**
- **PAYE Tables** – go to Payroll > Utilities > PAYE/NI/Stat. Payments and check that Table 2's **Date Table Becomes Effective** is 06/04/2026
- **Apprenticeship Levy and Annual Allowance*** – these can get overwritten as part of the upgrade. So, check the settings in **PAYE/NI/Stat. Payments** in Table 1 and Table 2 and make sure the settings are correct for your company(s).

9. Turn back OFF the Auto-deploy rates – IT Professional



Payroll

Auto-deploy payroll statutory rates upon Opera3 SE service start or restart :

*This ensures that any changes that were made to the **PAYE/NI/Stat. Payments** tables, like changes to the Apprenticeship Levy and / or the Annual Allowance settings for instance, don't get overwritten when the services are restarted in future.