Installation Guide

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1 Introduction

1.1 Pre-Installation Requirements

Backup

As always, when you are installing any Windows Application that directly affects the Windows Registry you should take a backup of any data files that will be affected.

1.2 Install Shield

Install Shield is now an industry standard way of installing Windows based applications. It will carry out all necessary tasks such as unpacking the programs, create Program Groups within Windows and update the Windows Registry where necessary.

1.3 AutoPlay CD

When you insert the Pegasus CIS CD in your CD-ROM Drive the software will "AutoPlay" and run the Setup.exe program automatically. If you do not wish to proceed with the installation you can just click the Cancel button and exit the setup.

You are still able to install the product, by running the Setup.exe file located on the root drive of the Pegasus CIS CD.

1.4 Separate Client & Server Installations

The Server Installation unpacks the Dictionaries, Reports, System, Demo Data and other files needed for Pegasus CIS to the Server. It also creates an Uninstall file so that you are able to uninstall these files at a later date.

The Server installation routine also copies the Client Installation files to a Folder called "Setup". It is from here that you would install each client by running Setup.exe. If the client is already installed on a PC, each time Pegasus CIS is launched it checks for any upgrades and automatically installs them if found.

The Client Installation only installs application program files, i.e. all data files are installed using the Server Installation. The default Destination Folder is "Program Files\Pegasus\CIS" where the application executable and related libraries are installed. Shortcuts to the main executable are created to both the Desktop and the Start Menu. Additional support files are installed to the Windows System and Common Files directories. All library (DLL) files are registered within the PC's Windows Registry. This is done so Pegasus CIS can locate them when run.

For Servers setup with strict client Installation access rights (i.e. non-admin rights), an Administrator can use Group Policies to authorise the Windows Installer package for the Client (Pegasus CIS.msi found in the Setup folder) and therefore elevate the installation rights on the Client.

2 Server Installation

The Server Installation should only be run directly from the Server, not from a Workstation PC. Server upgrades should be installed on the same machine that the original installation was performed on.

To start the Pegasus CIS Server Installation

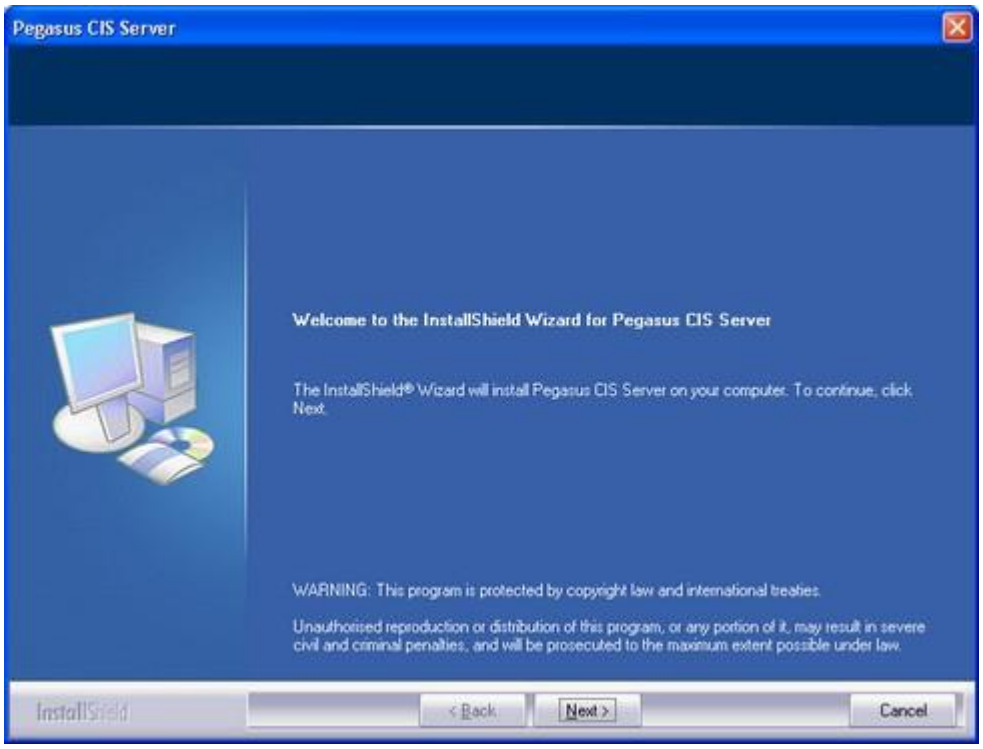
1. Insert the CD into the CD drive and run Setup.exe
2. Follow the instructions on the screen

NOTE: It is also possible to copy the contents of the CD-ROM to a folder on the server and run the set-up program from there.

When the program initially runs Pegasus CIS prepares the Install Shield Wizard that will install the program to the required location:

2.1 Welcome Screen

The first part of the setup reminds you of what is about to be installed. Select 'Next', to continue:

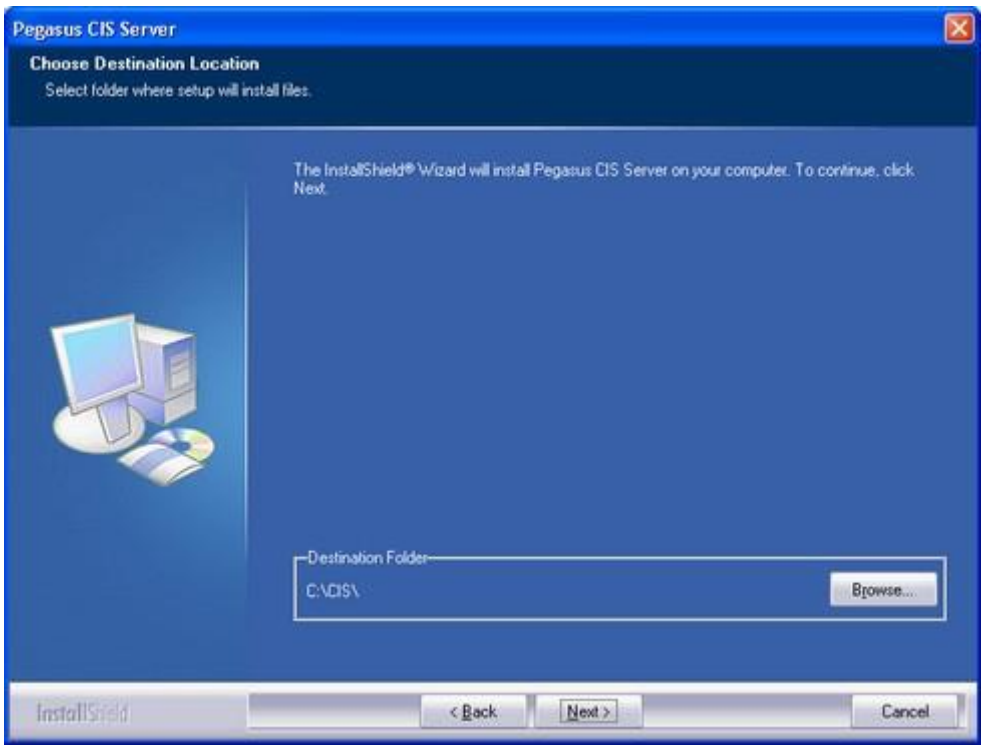


2.2 Installation Path

This stage will prompt for the drive and folder name in which the Pegasus CIS Server application will be installed.

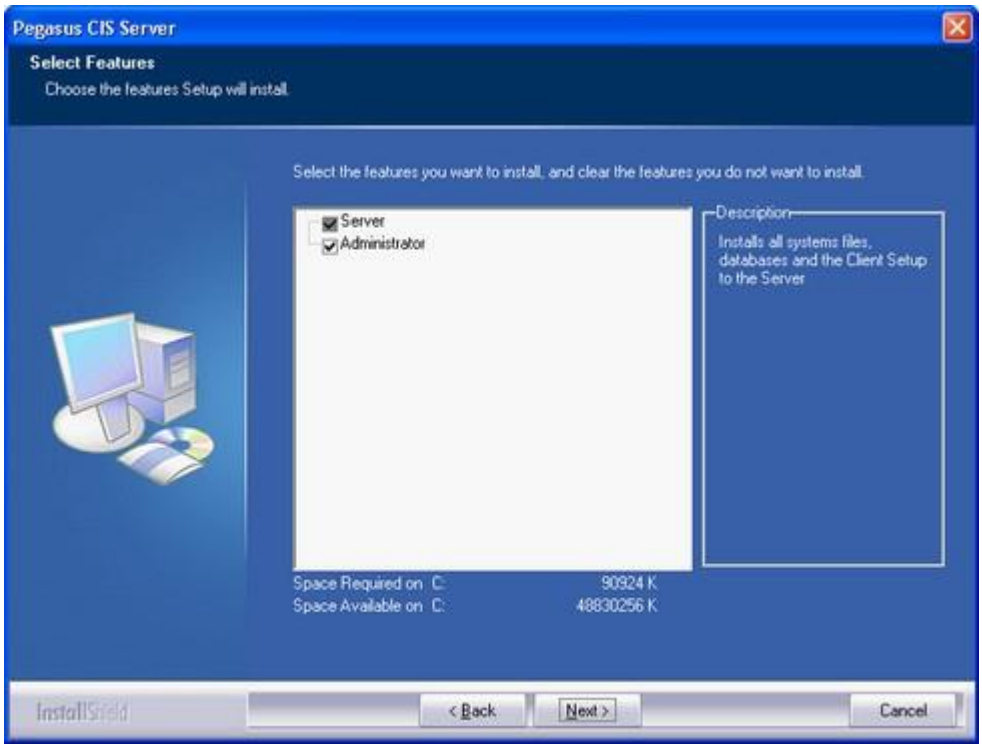
Even though it does not matter what Destination Folder is specified, it is recommended that the default path be retained and only the drive letter changed to a more suitable drive, e.g. if the server has a second local hard disk that stores all the company data files then the path could be changed to 'D:\CIS'. This will aid any support staff when trying to locate files over the telephone.

The setup routine will create a Network Share called "CIS" which will map itself to the specified Destination Folder. Appropriate permissions will need to be setup on the Destination Folder in order for Client Installations on other Workstations to gain access to the files held on this share.



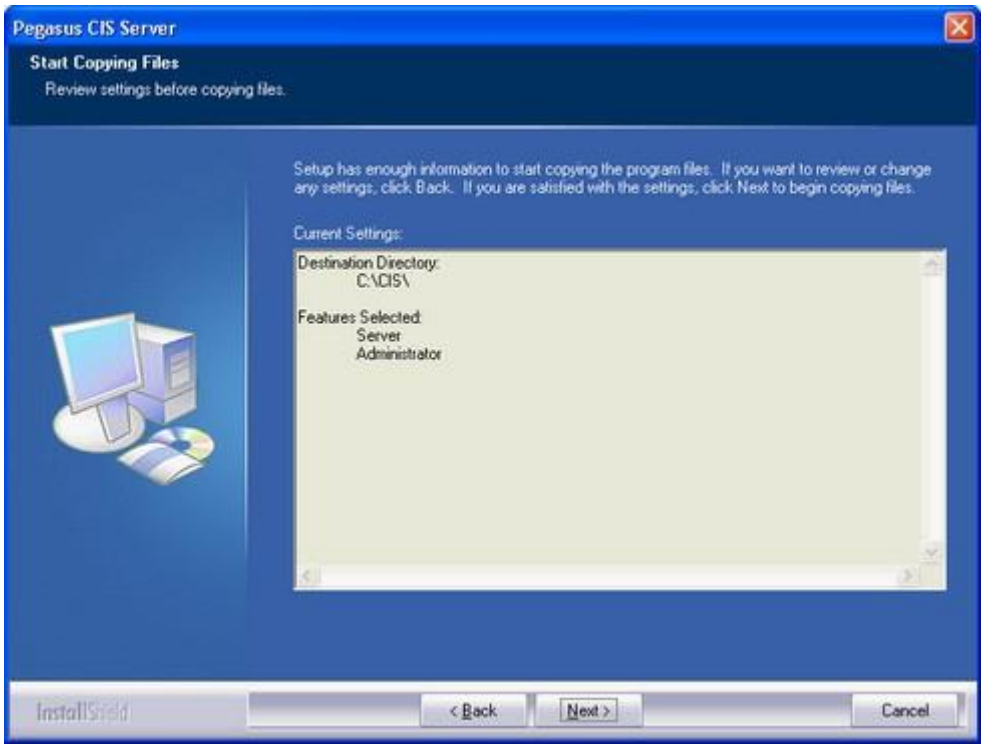
2.3 Select Features

This stage in the process is used to determine what applications are going to be installed. You have the option to install the Administrator program at the time of installing the server part of the application. By default the Administrator program will be installed:



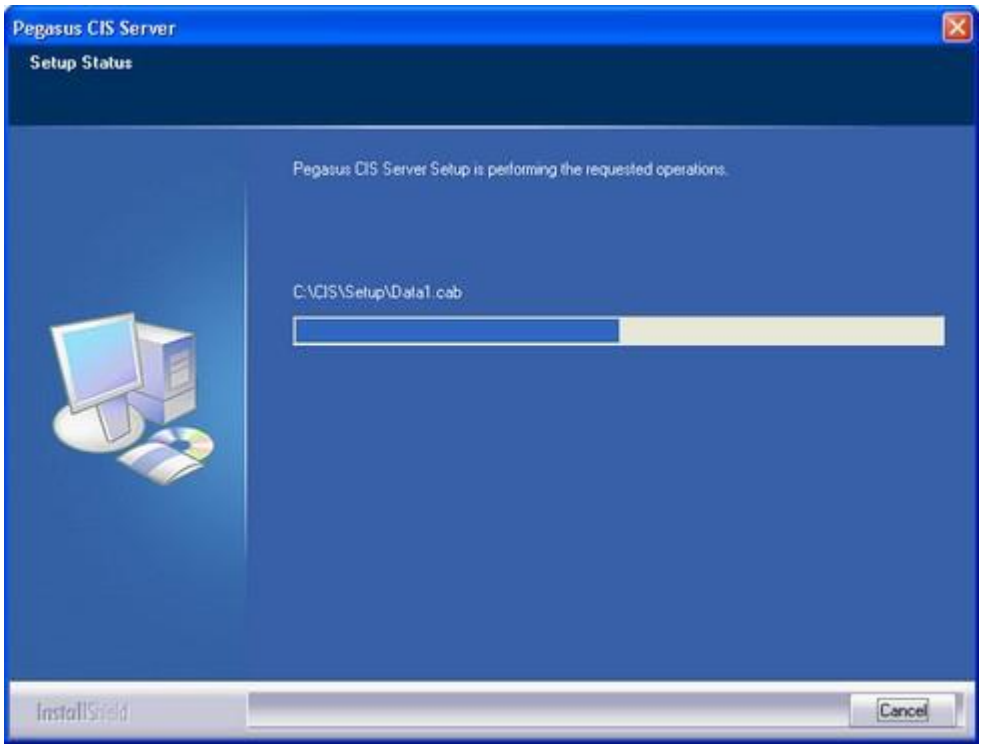
2.4 Confirm Details

Before the installation begins you get a confirmation page detailing the type of installation and the path of the installation. If you agree with these details click 'Next' to continue:



2.5 The Installation

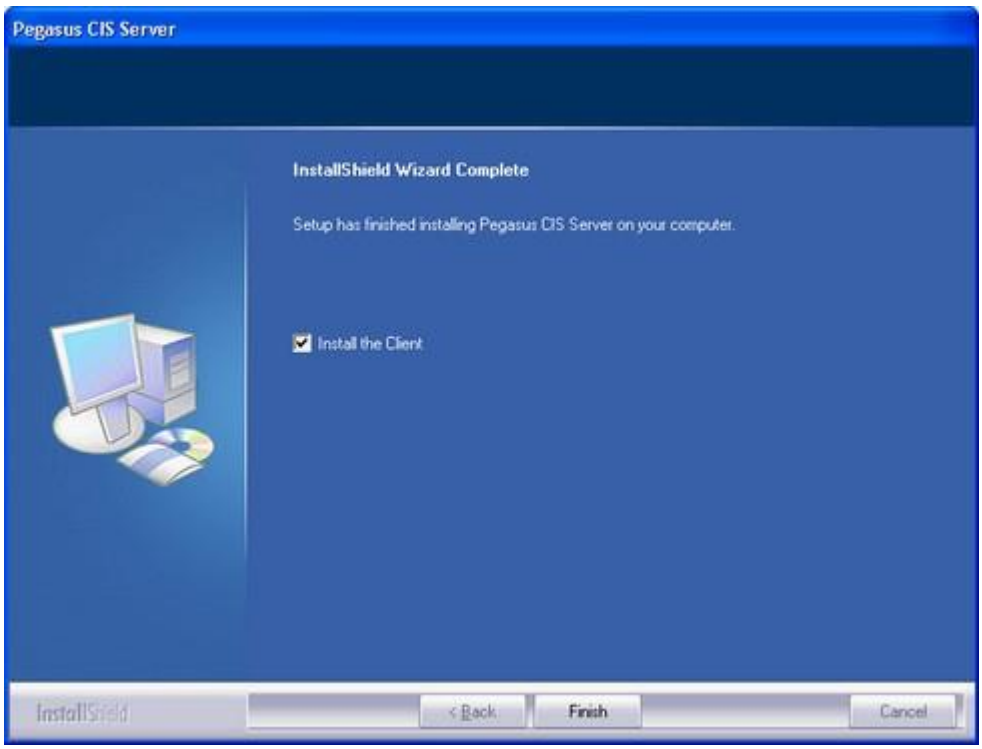
This process will extract and install all the required files from the installation source whether it is via CD or a directory from the file system:



2.6 Installation Complete

Once all files are extracted and installed the system will prompt that the 'Server Installation' of Pegasus CIS is complete.

The final stage of the installation gives you the option to install the Application Client. If you tick the 'Install the Client' box then the Server Install will automatically run the Client Installation routine for you once you click the Finish button:



NOTE: Although not necessary, it is recommended that you always install the Client on the Server as this will be of significant help if any upgrades are installed in the future. If you are running standalone, you will always need to install the Client.

3 Client Installation

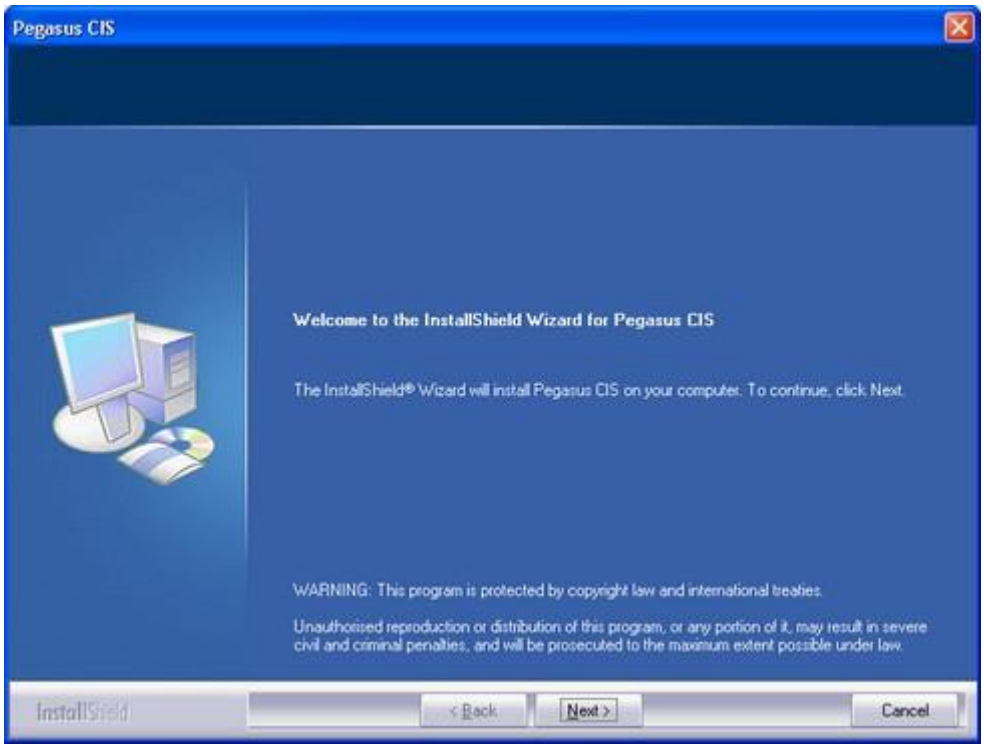
After the Server Setup has been installed on the Server, a Setup directory will exist as a sub folder of the main Pegasus CIS directory. When installing the Client from a Workstation you can browse to "\\ServerName\CIS\Setup" using Windows Explorer where you will find the Client Installation program. Alternatively, if you have setup a mapped drive to the CIS Network Share you can go directly to "X:\Setup" where X is the drive letter of the mapped drive. To launch the Client setup run "Setup.exe".

NOTE: Failure to install the Client setup on a PC attempting to run Pegasus CIS will experience errors with unregistered components. Standalone PC's wishing to run Pegasus CIS MUST have both a Server installation AND a Client Installation.

When the program initially runs Pegasus CIS prepares the Install Shield Wizard that will install the program to the required location:

3.1 Welcome Screen

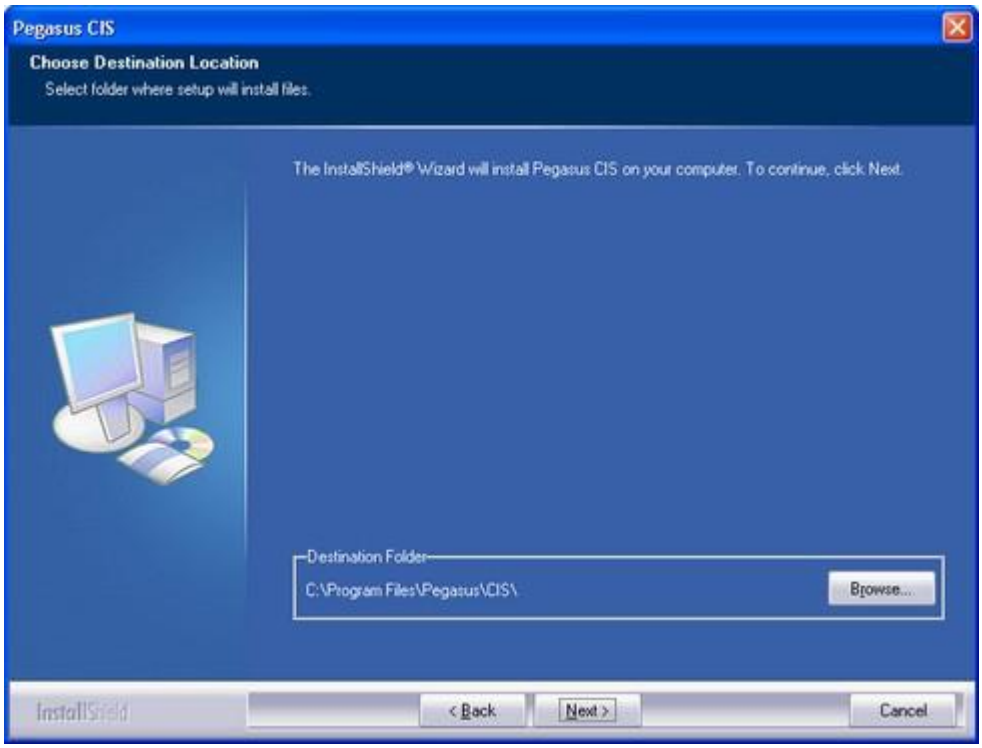
The first part of the setup reminds you of what is about to be installed. Select 'Next', to continue:



3.2 Installation Path

Stage 2 prompts the user to confirm the destination for the Client Installation or you can install it elsewhere by clicking the Browse button.

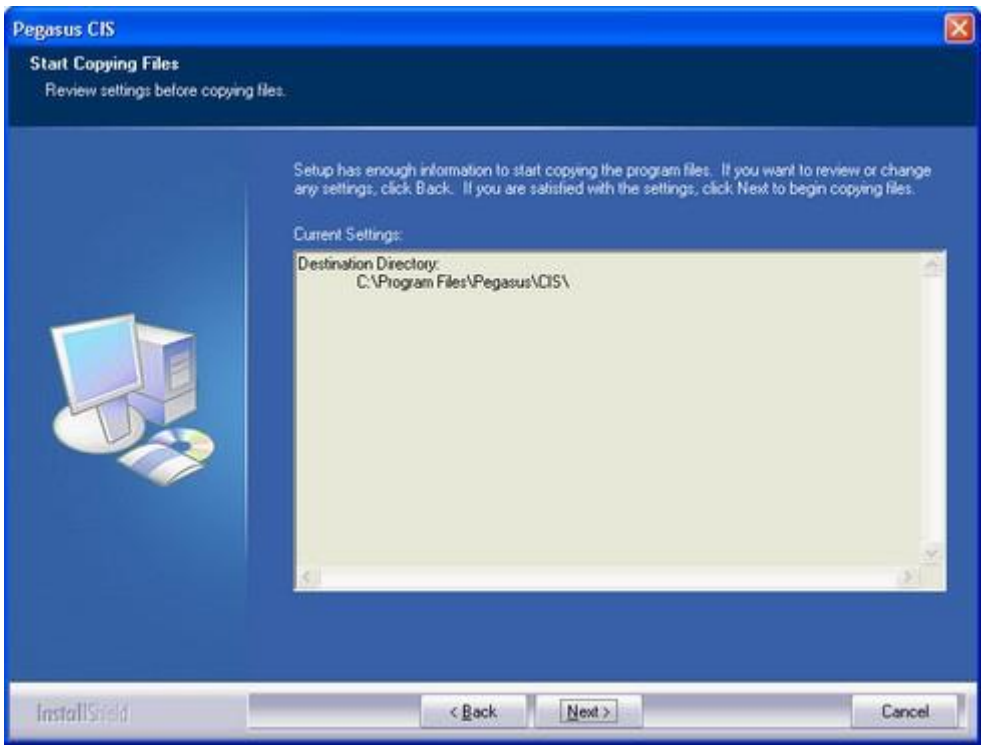
You can enter a destination yourself after clicking browse although if you do and this location does not exist you will be prompted to confirm that you wish to create this directory:



3.3 Confirm Details

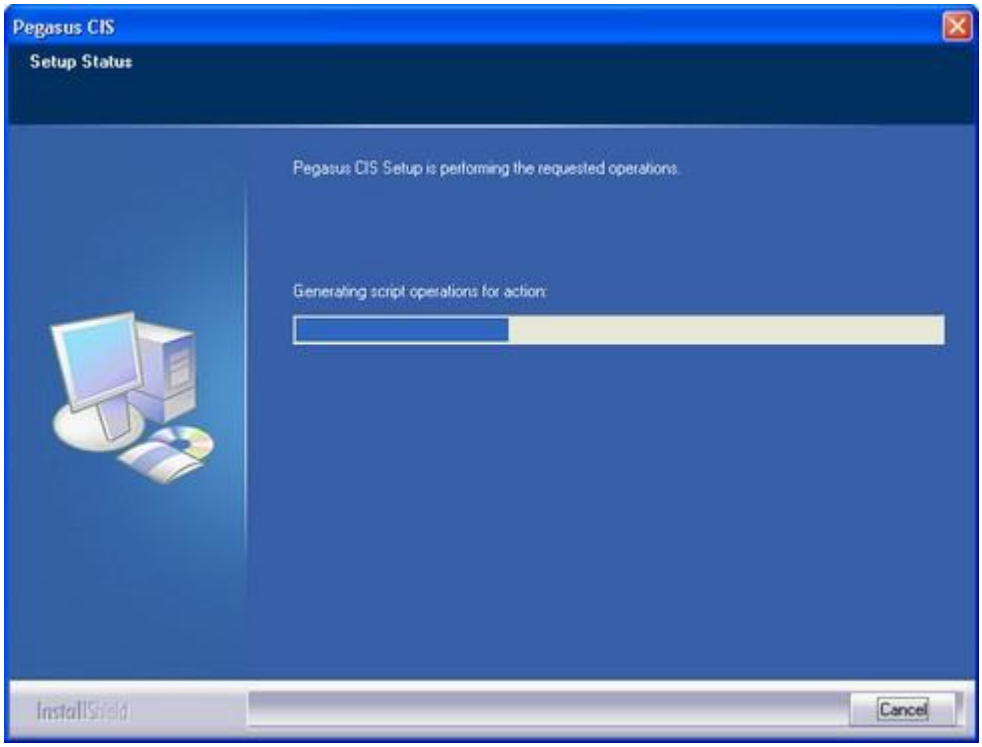
Stage three confirms the details entered in previous stages. Check the details shown here and once you are sure this is where you wish to install Pegasus CIS you can click 'Next' to continue.

Should you wish to alter any details on this screen you can click the Back button to return to a prior stage and alter any of this information:



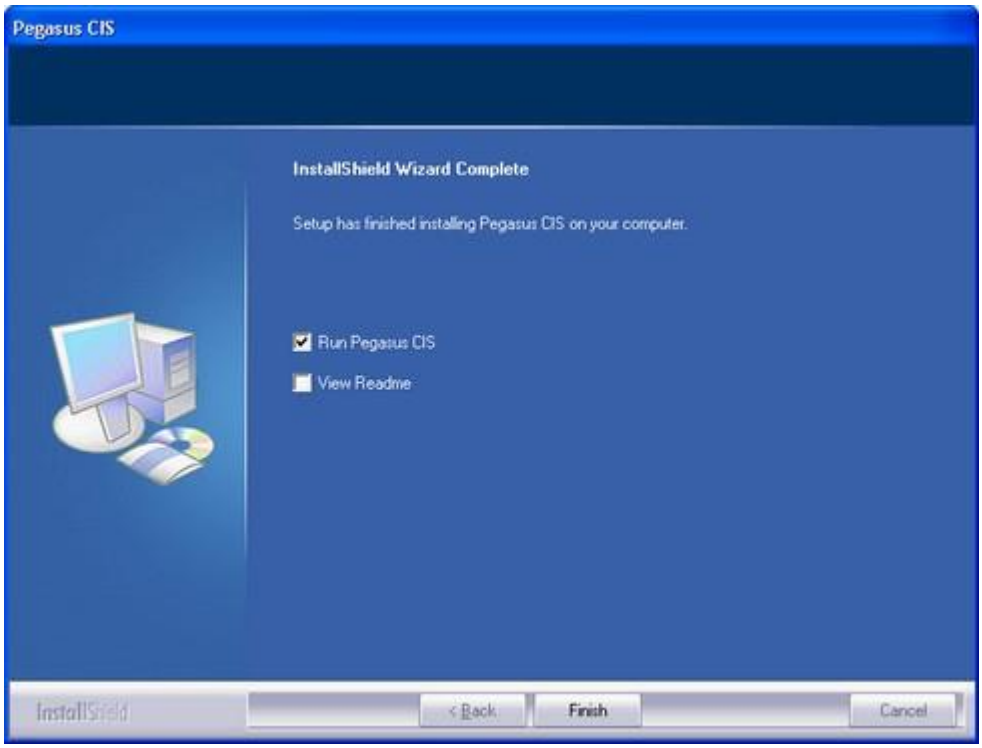
3.4 The Installation

This process will extract and install all the files required for the Client Application:



3.5 Installation Complete

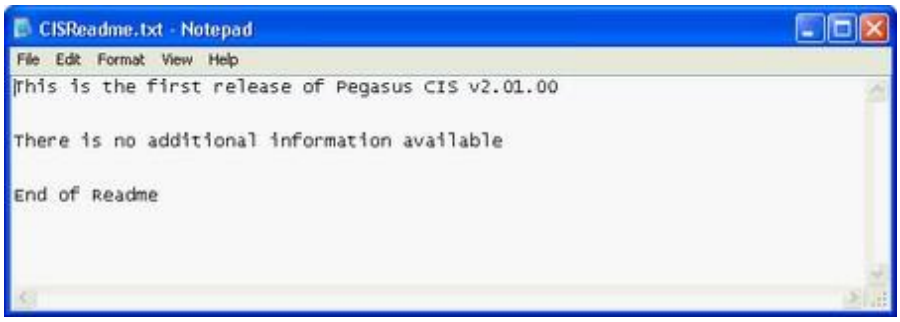
This screen gives you the option to launch Pegasus CIS and view the Readme file. Tick the relevant boxes then click Finish:



NOTE: We would recommend viewing the Readme file as this file contains relevant information on the version you have just installed.

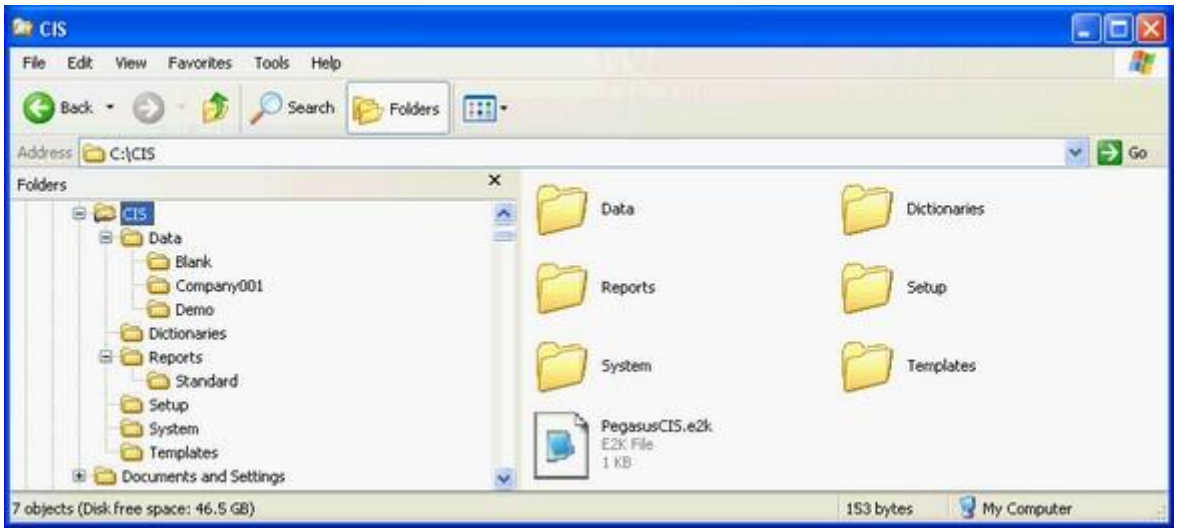
3.6 The Readme File

The readme file contains any last minute information about the version you have just installed, including significant changes, known issues and omissions from the documentation.


CISReadme.txt - Notepad
File Edit Format View Help
This is the first release of Pegasus CIS v2.01.00
There is no additional information available
End of Readme

4 Server Files & Folders

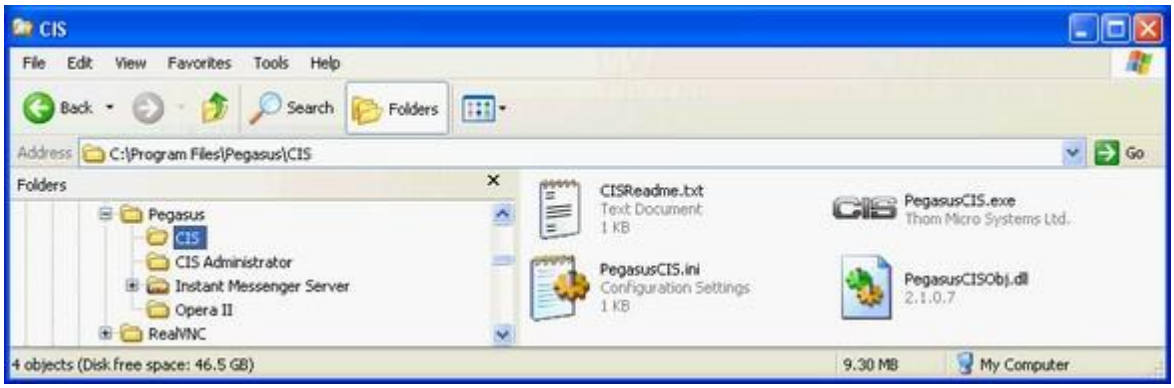
The following section details what folders and files are installed by the Pegasus CIS Server Installation, and what they are used for.



CIS	The main folder that contains all the Pegasus CIS application files. A different folder name may be chosen at the time of installation. This folder contains the PegasusCIS.E2K file which contains the connection details to the PegasusCISCore.mdb database found in the System folder.
Data	The folder containing the company database files. Within this folder you will find a Blank folder and a Demo folder: ○ The Blank folder will contain an empty PegasusCIS.mdb database file used to create new Companies ○ The Demo folder also contains a PegasusCIS.mdb database file which contains all of the Demodata Any live company datasets will also be created in sub folders (i.e. Company001) and will also contain PegasusCIS.mdb database files
Dictionaries	This folder contains any Data Dictionaries linked into the system. The main Pegasus CIS dictionary is the PegasusCISDD.mdb database file.
Reports	The folder containing the Pegasus CIS Crystal Report files. The reports distributed with Pegasus CIS can be found within a sub folder called Standard. Custom Report folders can also be created within the main Reports folder and can be setup globally for the installation or against each Company/Dataset.
Setup	This folder contains the Client Installation files for use across the network. Files include: ○ Data1.cab - Contains the installation files for the PegasusCIS.msi ○ PegasusCIS.msi - The Windows Installer Client Installation Package ○ Setup.exe - The main installation executable. This calls Windows Installer with the PegasusCIS.msi package ○ Setup.skin - Contains information for the Client Setup to give it an XP Look
System	This folder contains the PegasusCISCore.mdb database file. This is where the Application Paths, Companies, Users, Security Groups and User Preferences are stored.
Templates	The Templates folder is primarily designed to contain templates for Mail Merging and Remote Timesheets

5 Client Files & Folders

The following section details what folders and files are installed by the Pegasus CIS installation, and what they are used for.

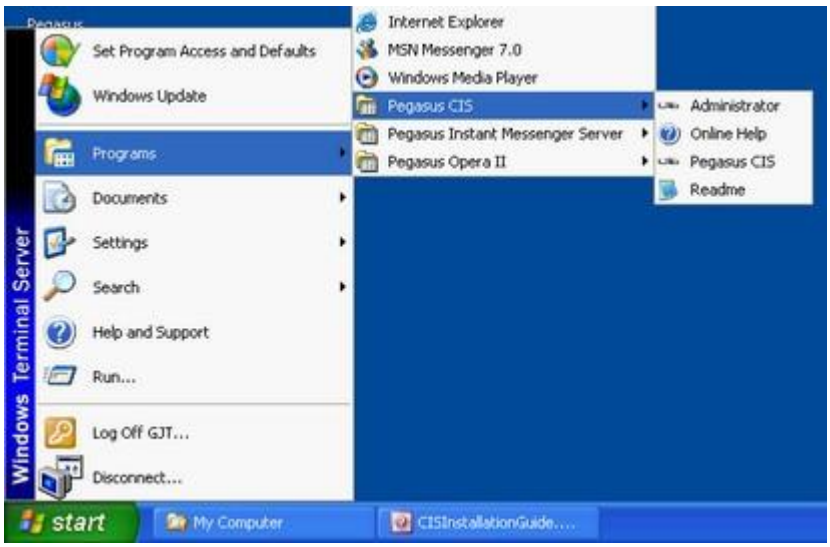


CIS	The main folder that contains all the Pegasus CIS Client application files. A different folder name may be chosen at the time of installation. Files Include: ○ PegasusCIS.exe - The main application program ○ PegasusCISObj.dll - The main application code library ○ PegasusCIS.ini - Contains the path to the PegasusCIS.E2K file on the server. This will be set automatically if the Client has been installed from the CIS\Setup folder on the Server. ○ CISReadme.txt - contains any last minute information about the version you have just installed, including significant changes, known issues and omissions from the documentation

6 Running Pegasus CIS

When Pegasus CIS has been installed you should have the Pegasus CIS shortcut on your desktop. If you have installed the Administrator, you should have the Administrator shortcut on your desktop. Double click the Icons to launch the products:

If you do not have a shortcut on your Windows Desktop, click the Windows Start button then navigate to Programs, Pegasus CIS where you will find shortcuts to all installed options:



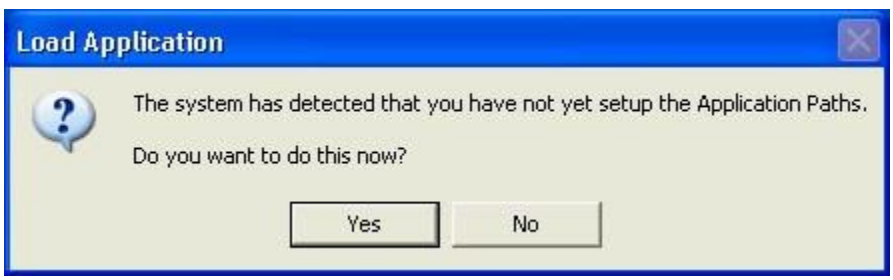
NOTE: If you have installed the Administrator program, that should also appear in the Pegasus CIS folder.

6.1 Running Pegasus CIS for the First Time

The very first time the Pegasus CIS Client is run is when the system paths get setup and stored on the server for all users on the system. It is therefore important to have these setup correctly.

If you are running the Client for the first time on the Server then by default the system will look for the following:

1. A network share called 'CIS' setup on the local machine, i.e. \\LocalMachineName\CIS
2. If it does not find this share then it looks for C:\CIS and D:\CIS respectively
3. If it still does not find an installation it will prompt the user to run the Administrator program to manually set the system paths:



If you are running the Client for the first time on a workstation that has been installed from the 'CIS\Setup' folder (from either the 'CIS' network share or a mapped drive) then the Client should already be setup to point to the appropriate network location. The Client will therefore use this path as a basis to automatically setup and store the system paths on the server. If the Server files could not be located the Client will prompt for the PegasusCIS.E2K file located in the main 'CIS' installation folder.

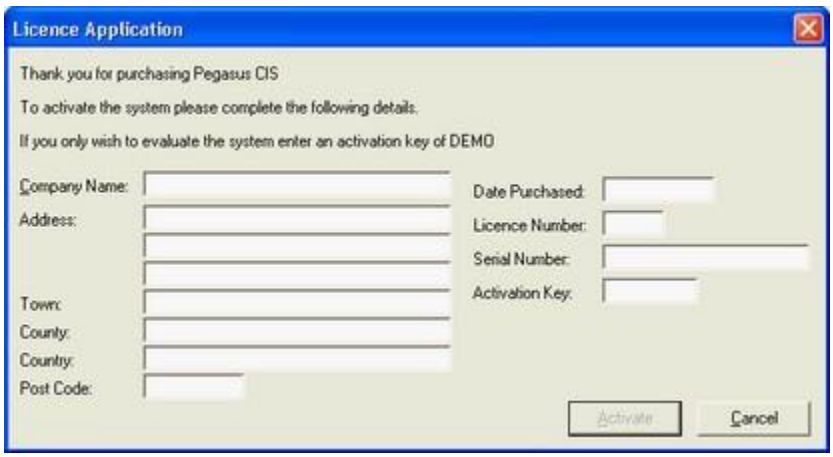
NOTES:

1. It is important to have the system paths stored using either mapped network drives or using full UNC paths to network shares. With the exception of a standalone installation, if this is not the case then each workstation will look for the server files on their local hard drives and not the correct location on the server.
2. The system paths can be changed at any time using the Administrator program
3. Make sure that appropriate permissions have been setup on the server folder where Pegasus CIS has been installed otherwise workstations running the Pegasus CIS Client will be unable to connect to the Server files and will receive an insufficient access rights message:

6.2 Activating Pegasus CIS

The first time Pegasus CIS is launched and the paths have been setup, you are prompted to enter the users Licence Key. Enter the details into the screen displayed using the information from your registration card.

NOTE: If you do not have an Activation Key, you can enter the word '**DEMO**' into the Activation Key field to run Pegasus CIS in Evaluation Mode. In Evaluation Mode limitations apply to the number of transactions allowed and also the Import/Export capabilities:



Once all the details have been entered, click the Activate button.

NOTE: You must enter your activation details from your registration card accurately (that includes letter casing) otherwise the activation will not work.

6.3 Logging in to Pegasus CIS

Once Activated, Pegasus CIS will prompt for a User Name and Password. Unless the Administrator program has been used to create additional Users, Pegasus CIS has 'Manager' as the only defined user. By default the Manager user does not have a Password. Enter 'Manager' as the User Name with no Password and click OK to Login:

6.4 The Manager User

The Manager user is the system defined Administrator user and cannot be renamed or deleted or have its permissions changed. By default, the Manager user gets access to the more advanced and critical areas of the system that all other users have to have explicitly enabled for use, in particular, access to the Administrator program and Data Erase/Reset routines (used to clean out test data in a pre-live running situation).

Once logged into Pegasus CIS, the Manager user can access the Administrator program from either the Cog icon on the Toolbar or from the Tools Menu (where Data Erase and Reset options will also be found when activated).

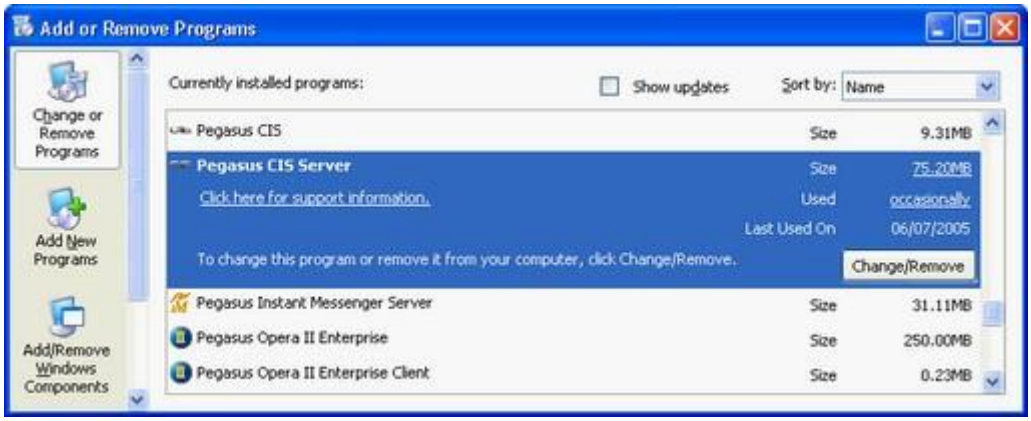
NOTE: It is recommended that the 'Manager' user is setup with a secure Password that only System Administrators know as by default this user gets access to all areas and functionality of the system.

7 Server Uninstall

Pegasus CIS Server can be uninstalled using two methods:

1. By inserting the CD into the CD drive and running Setup.exe, or
2. Using Add/Remove Programs

Both of these methods can uninstall the product but they can also be used to repair and modify the installation. The following example uses the Add/Remove Programs method:



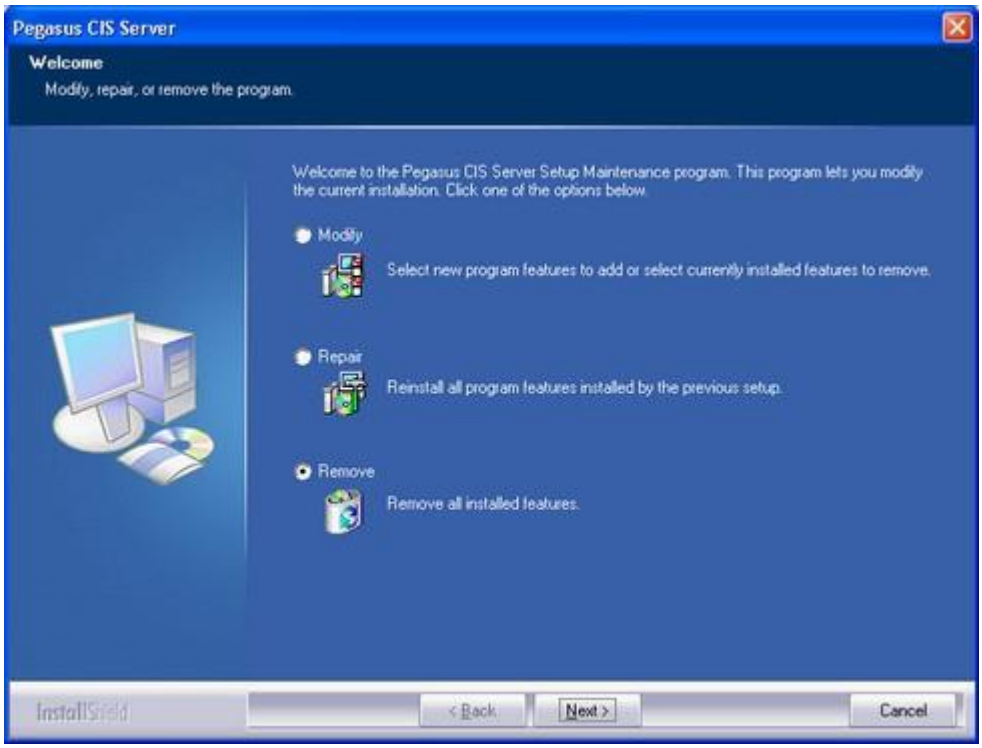
To launch the uninstall routine:

1. Click Start and select Settings
2. Select Control Panel
3. Select Add/Remove Programs
4. Select Pegasus CIS Server from the list (see above)
5. Click Change/Remove

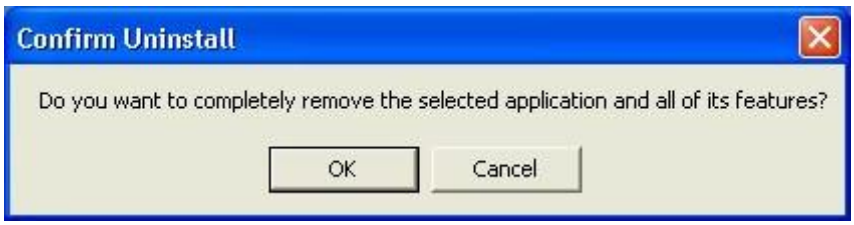
The Install Shield Wizard will take you through the following Steps:

7.1 Welcome Screen

The first part of this routine allows you to choose what action you would like to take:

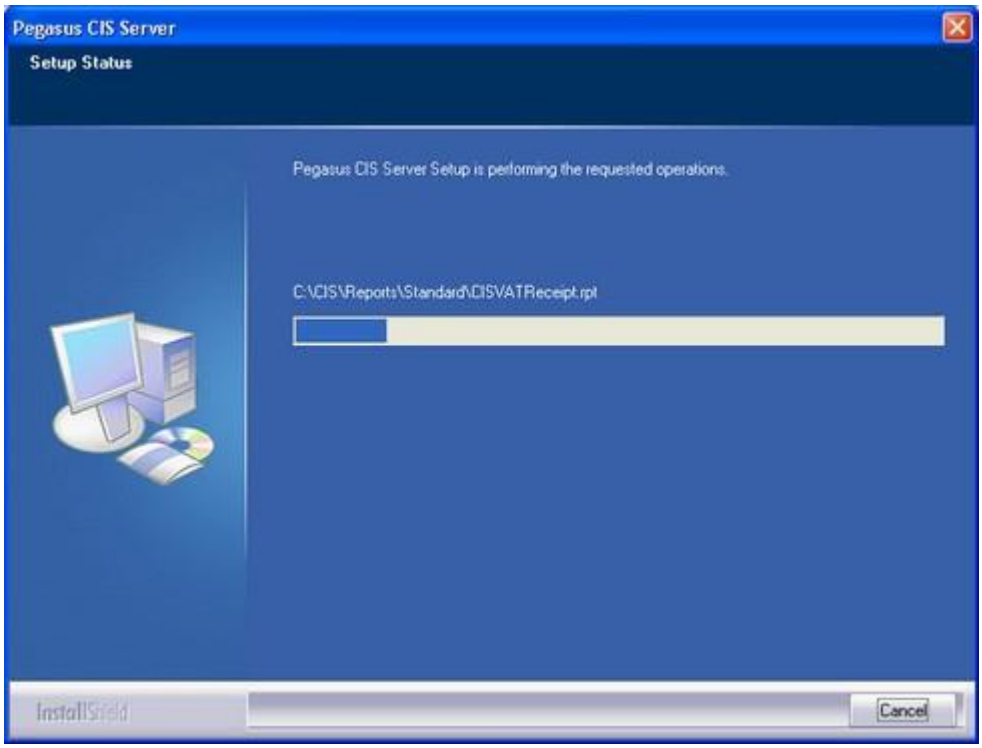


Select 'Remove' and click 'Next', you are then prompted with the following message, click OK to uninstall:



7.2 The Uninstall

This process will extract and uninstall all the required files from the installation source:

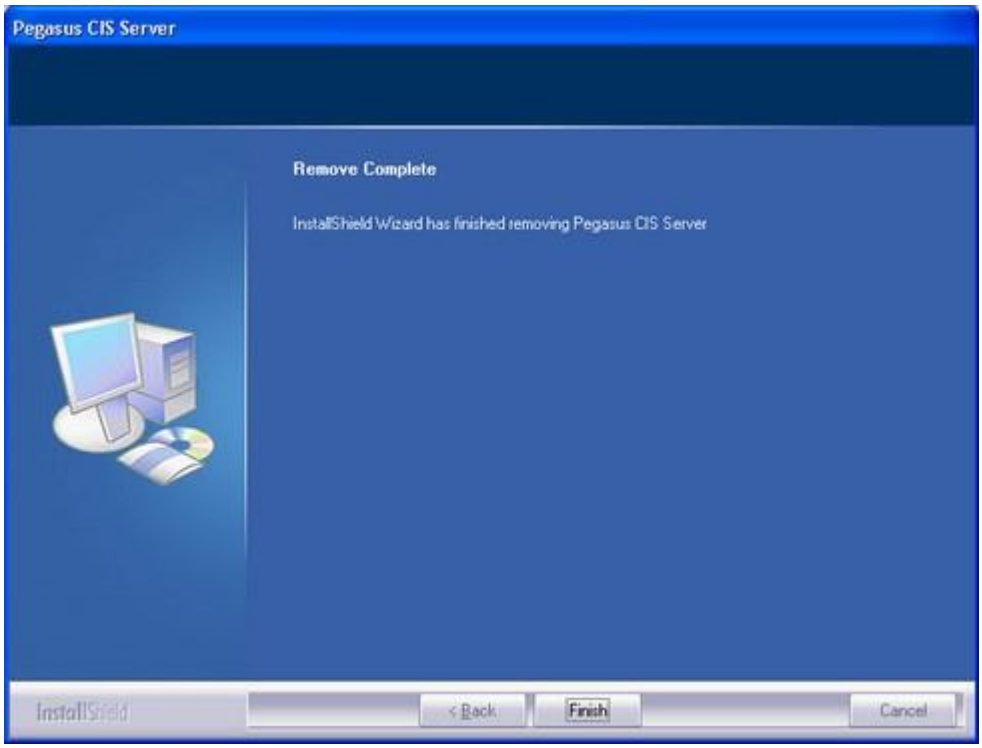


NOTES:

1. For Pegasus CIS Server installations the uninstall process removes those files and registry entries that were created during the installation. However, some components may be left on the computer: the PegasusCIS.E2K file, System\PegasusCISCore.mdb database file and any company datasets you have created will always be left at the end of an uninstall because they contain information specific to your installation (i.e. data and setup details) and should therefore be used when reinstalling the application. If you do not want to keep these files then the entire CIS folder may be deleted.
2. The "CIS" Network Share created on Installation will not be removed

7.3 Uninstall Complete

The Remove Complete screen will be shown when all files have been successfully uninstalled.

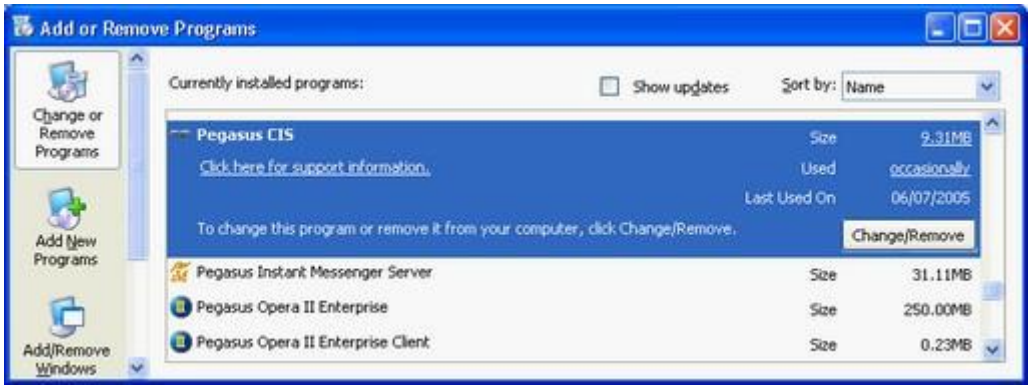

Pegasus CIS Server
Remove Complete
InstallShield Wizard has finished removing Pegasus CIS Server
InstallShield
< Back
Finish
Cancel

8 Client Uninstall

Pegasus CIS Client can be uninstalled using two methods:

1. By running Setup.exe from the CIS\Setup folder on the Network, or
2. Using Add/Remove Programs

Both of these methods can uninstall the product but they can also be used to repair the installation. The following example uses the Add/Remove Programs method:



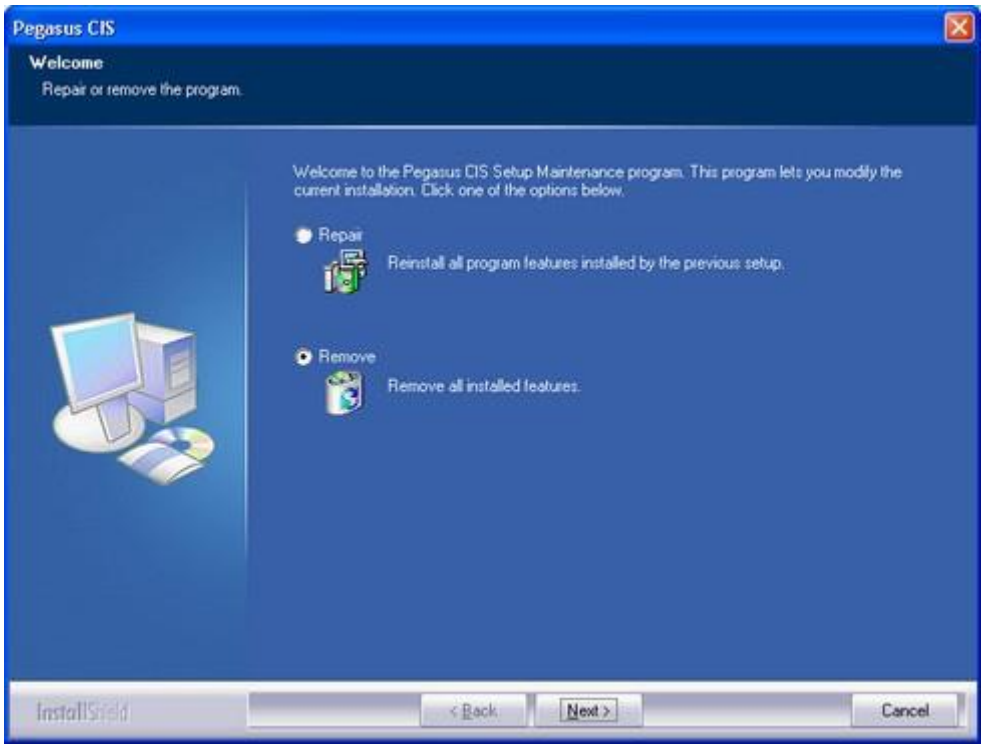
To launch the uninstall routine:

1. Click Start and select Settings
2. Select Control Panel
3. Select Add/Remove Programs
4. Select Pegasus CIS from the list (see above)
5. Click Change/Remove

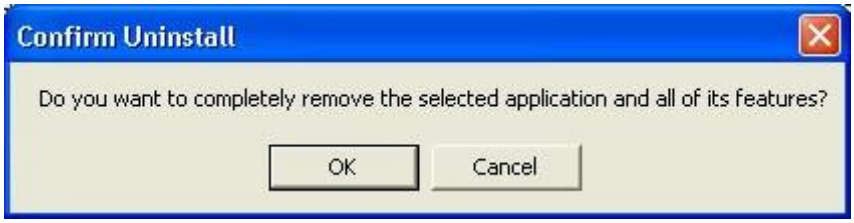
The Install Shield Wizard will take you through the following Steps:

8.1 Welcome Screen

The first part of this routine allows you to choose what action you would like to take:

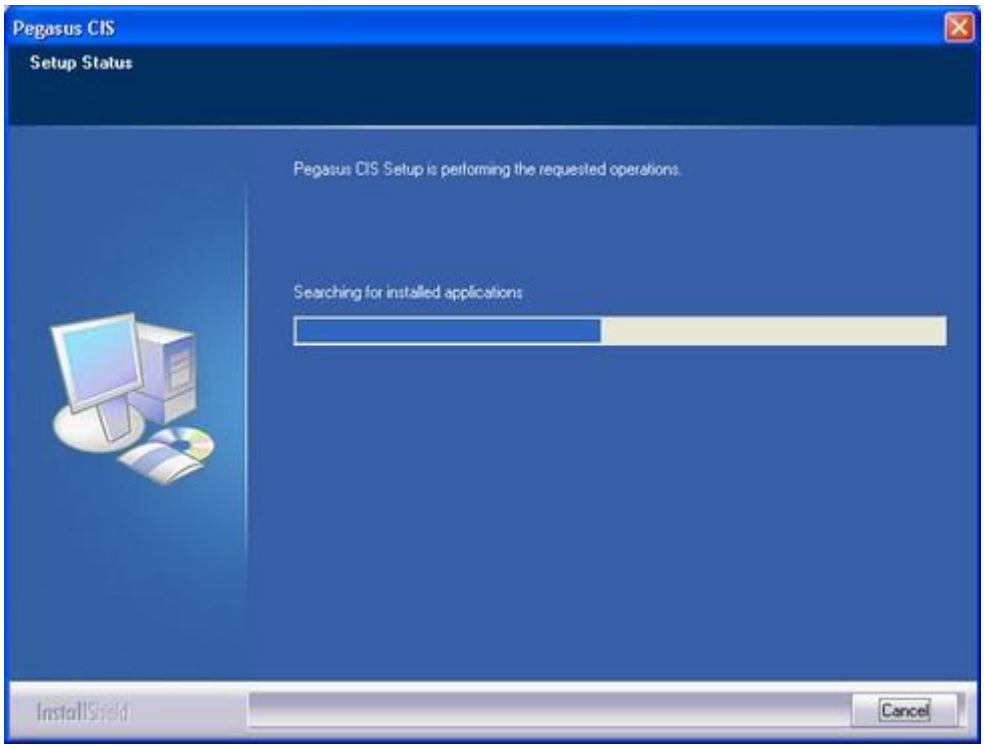


Select 'Remove' and click 'Next', you are then prompted with the following message, click OK to uninstall:



8.2 The Uninstall

This process will extract and uninstall all the required files from the installation source:

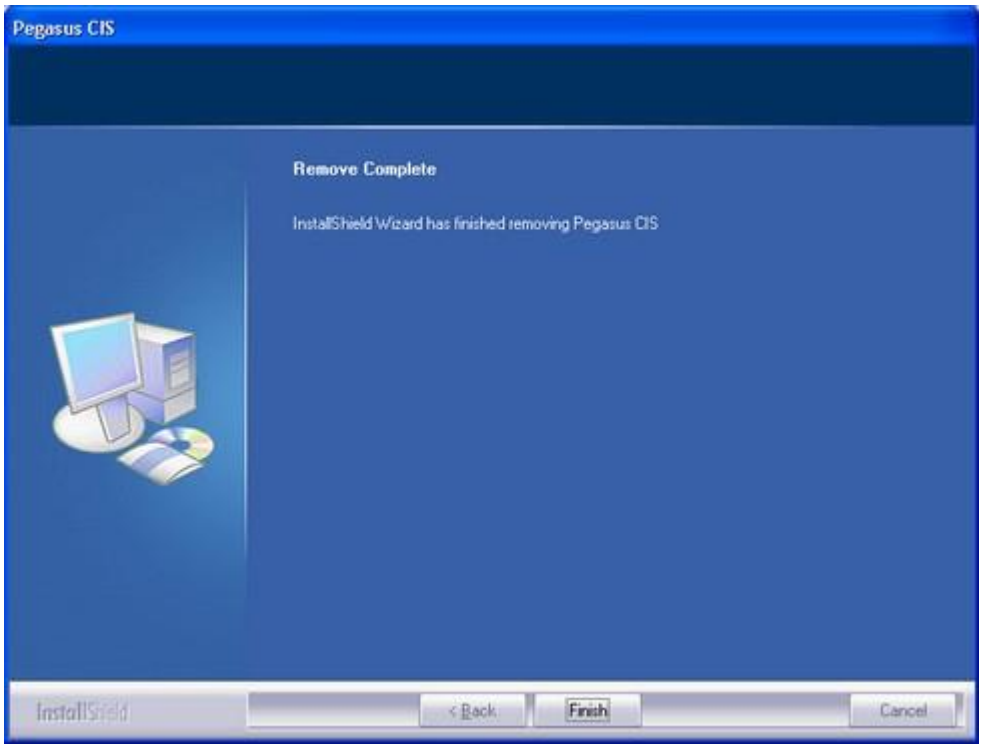


NOTES:

1. For Pegasus CIS Client Installations the Uninstall removes all files and registry entries that were created during the installation.
2. When uninstalling a Standalone installation it is recommended that you Uninstall the Client before the Server.

8.3 Uninstall Complete

The Remove Complete screen will be shown when all files have been successfully uninstalled.


Pegasus CIS
Remove Complete
InstallShield Wizard has finished removing Pegasus CIS
InstallShield
< Back
Finish
Cancel

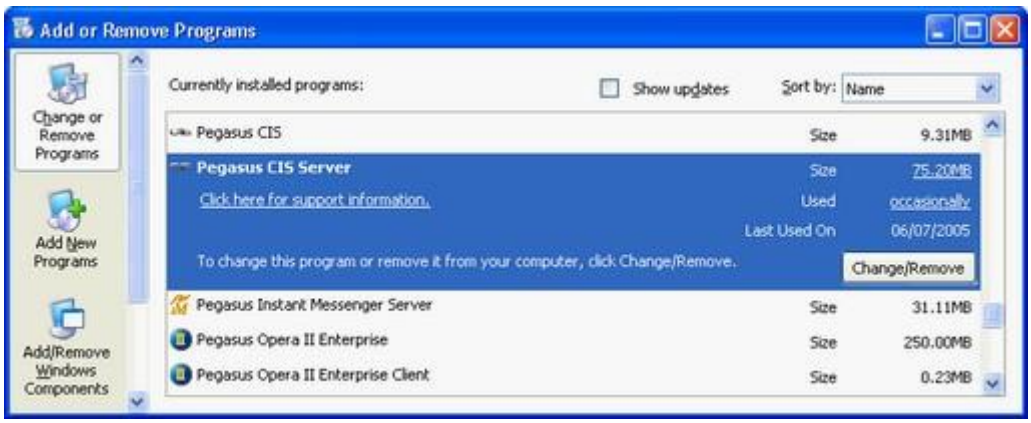
9 Server Repair

If any of the files installed with the Server Installation get deleted or are somehow corrupted, you can run the built in Installation Repair routine to restore all files to the correct versions.

Pegasus CIS Server can be repaired using two methods:

1. By running Setup.exe from the CIS\Setup folder on the Network, or
2. Using Add/Remove Programs

Both of these methods can repair the product but they can also be used to uninstall and modify the installation. The following example uses the Add/Remove Programs method:



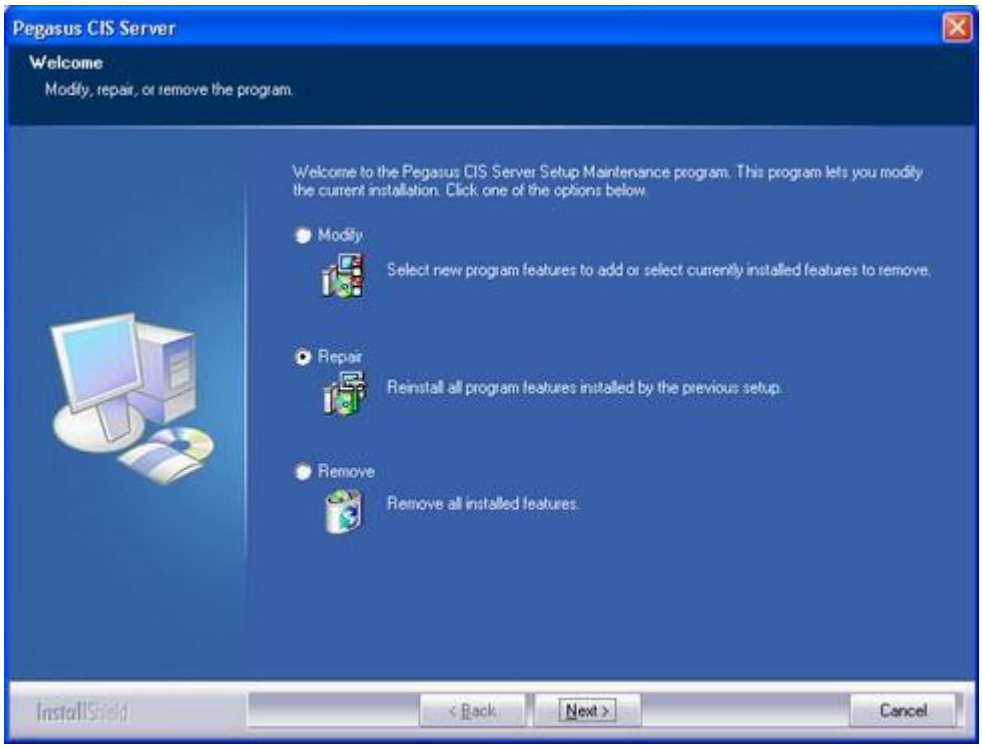
To launch the repair routine:

1. Click Start and select Settings
2. Select Control Panel
3. Select Add/Remove Programs
4. Select Pegasus CIS Server from the list (see above)
5. Click Change/Remove

The Install Shield Wizard will take you through the following Steps:

9.1 Welcome Screen

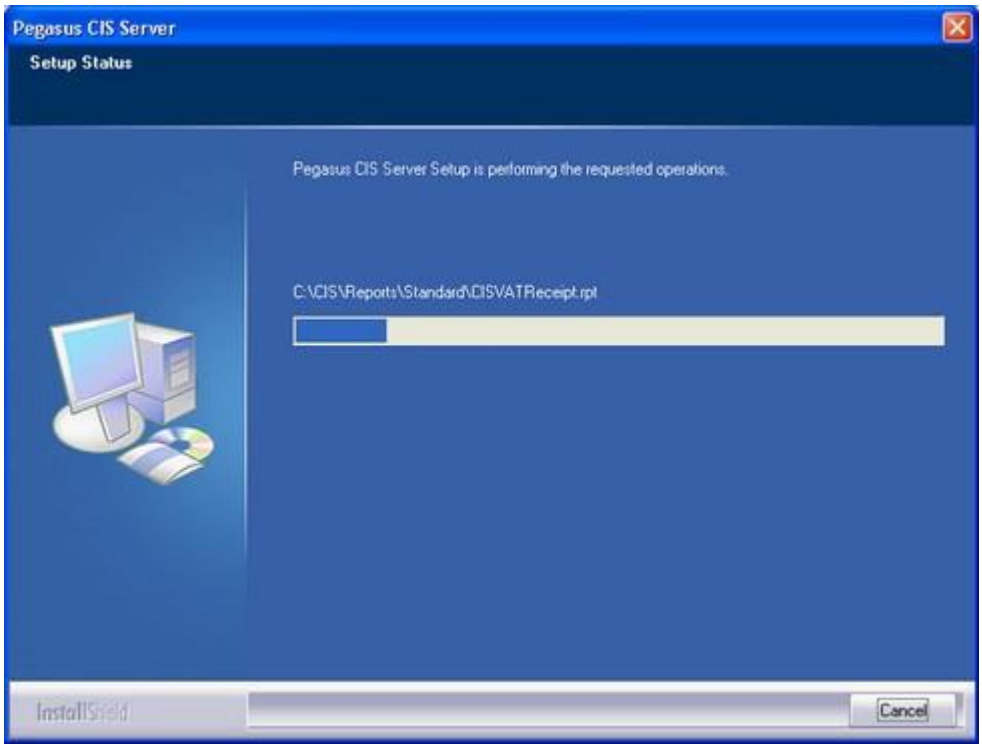
The first part of this routine allows you to choose what action you would like to take:



Select 'Repair' and click 'Next'

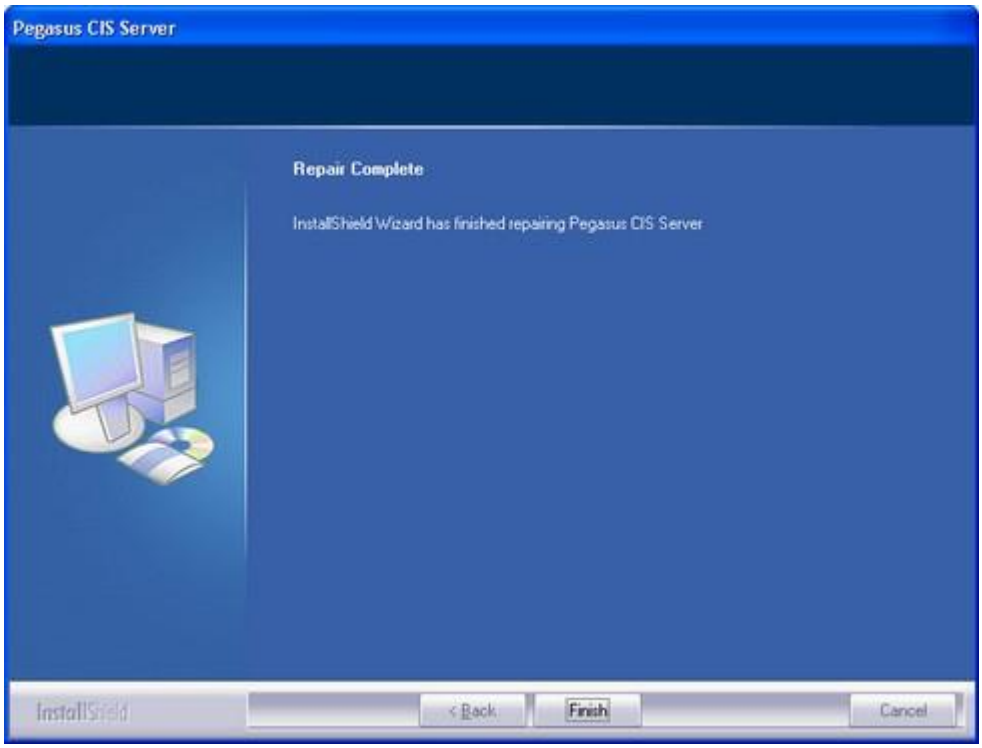
9.2 The Repair Progress

This process will extract and reinstall any files that are missing, have become corrupt or have been replaced with older versions:



9.3 Repair Complete

Once all files have been repaired the system will prompt that the 'Server Installation' of Pegasus CIS is complete. Click the Finish button to close the Setup Window:


Pegasus CIS Server
Repair Complete
InstallShield Wizard has finished repairing Pegasus CIS Server
InstallShield
< Back
Finish
Cancel

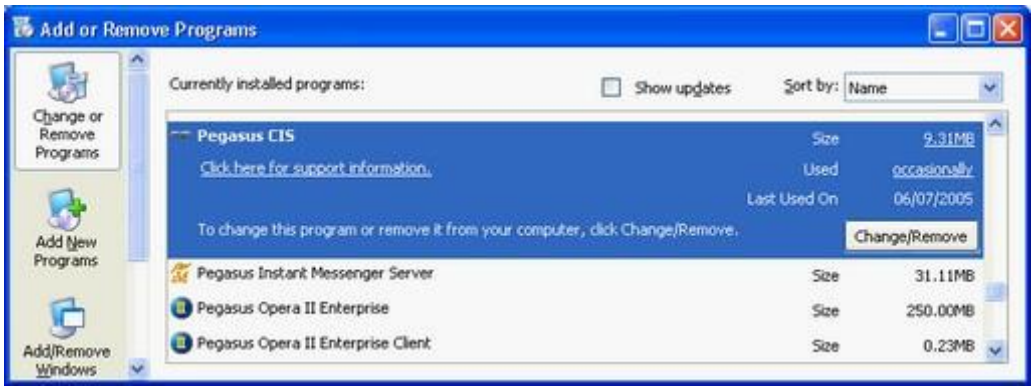
10 Client Repair

If any of the files installed with the Client Installation get deleted or are somehow corrupted, you can run the built in Installation Repair routine to restore all files to the correct versions.

Pegasus CIS can be repaired using two methods:

1. By inserting the CD into the CD drive and running Setup.exe, or
2. Using Add/Remove Programs

Both of these methods can repair the product but they can also be used to uninstall the installation. The following example uses the Add/Remove Programs method:



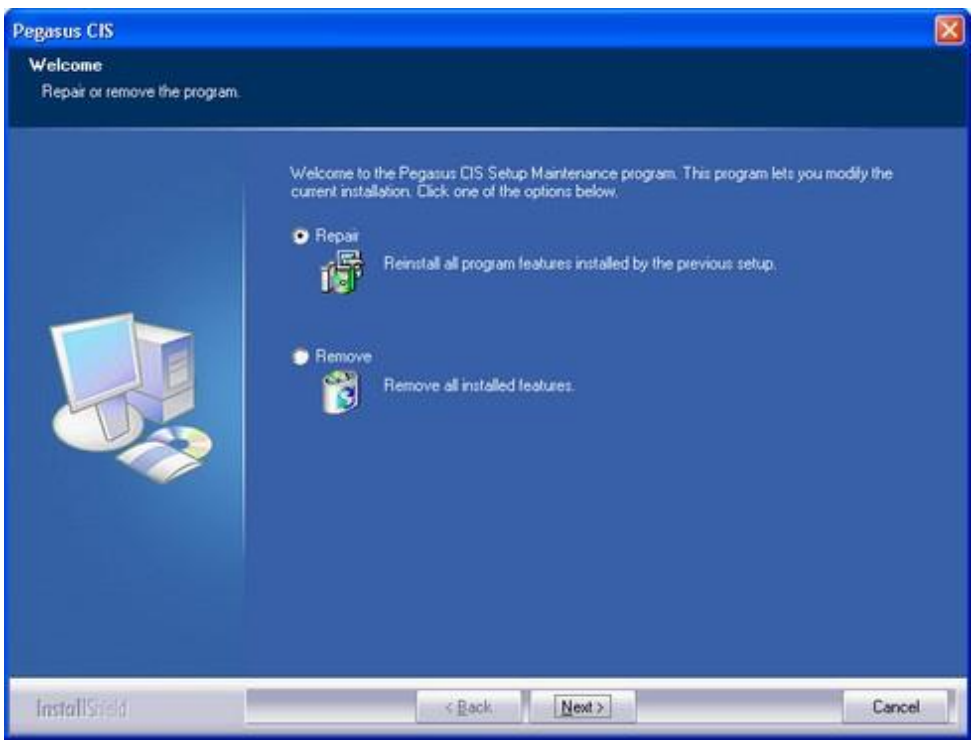
To launch the repair routine:

1. Click Start and select Settings
2. Select Control Panel
3. Select Add/Remove Programs
4. Select Pegasus CIS from the list (see above)
5. Click Change/Remove

The Install Shield Wizard will take you through the following Steps:

10.1 Welcome Screen

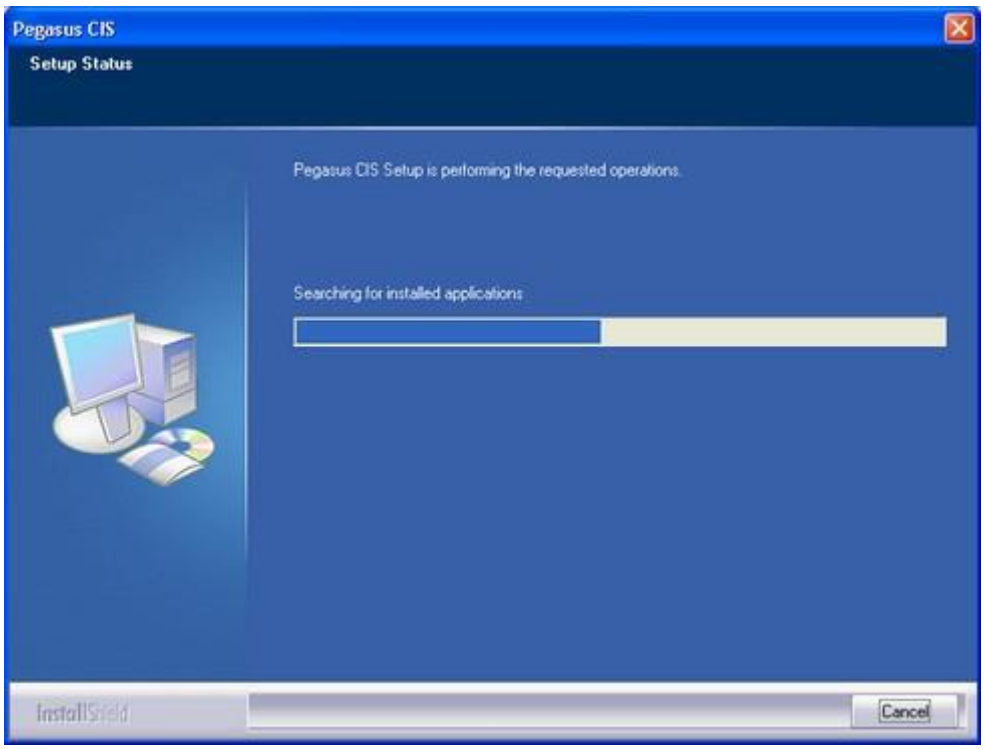
The first part of this routine allows you to choose what action you would like to take:



Select ‘Repair’ and click 'Next'

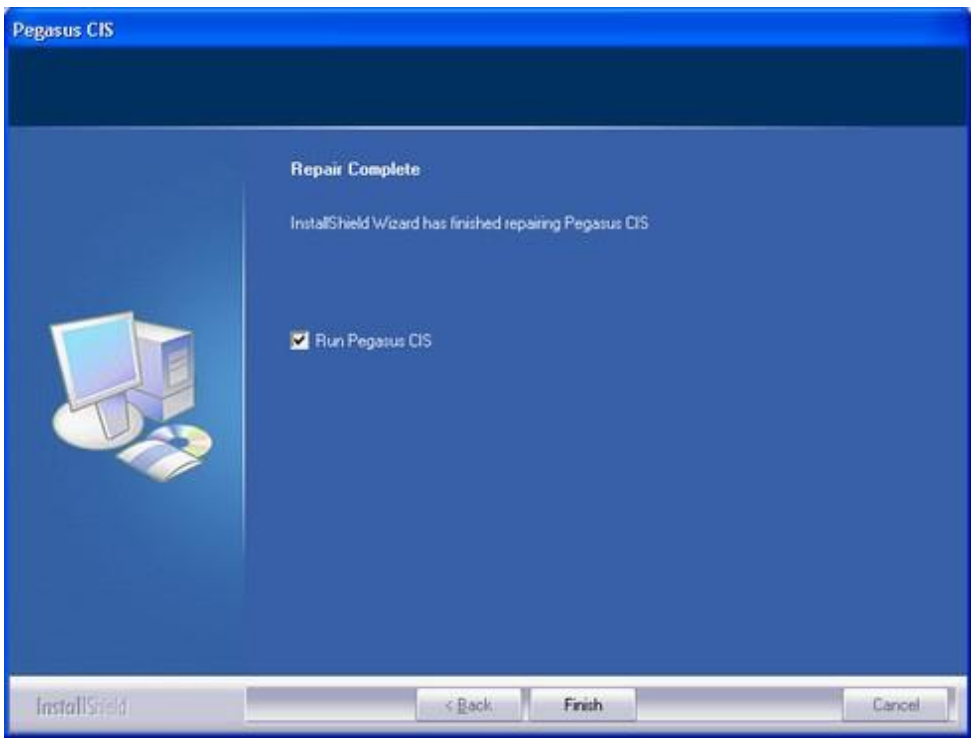
10.2 The Repair Progress

This process will extract and reinstall any files that are missing, have become corrupt or have been replaced with older versions:



10.3 Repair Complete

Once all files have been repaired the system will prompt that the ‘Client Installation’ of Pegasus CIS is complete. Click the Finish button to close the Setup Window:

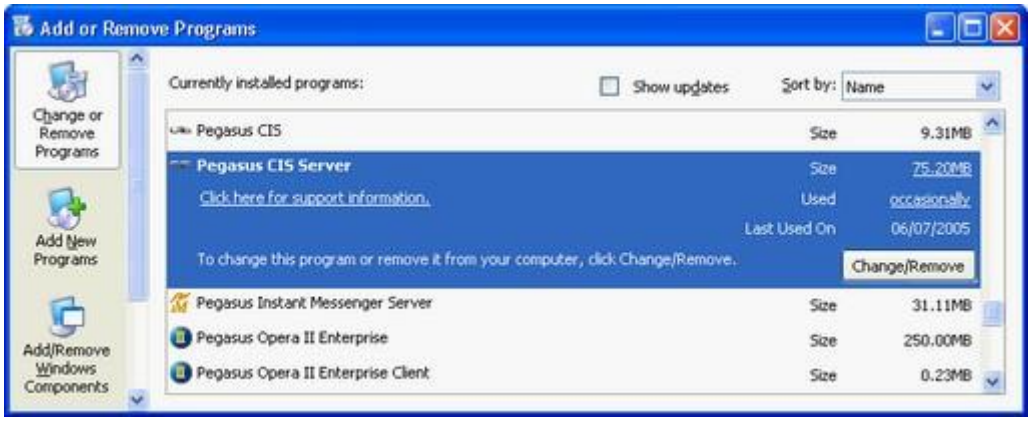


11 Server Modify

Pegasus CIS Server can be modified using two methods:

1. By inserting the CD into the CD drive and running Setup.exe, or
2. Using Add/Remove Programs

Both of these methods can modify the product but they can also be used to uninstall and repair the installation. The following example uses the Add/Remove Programs method:



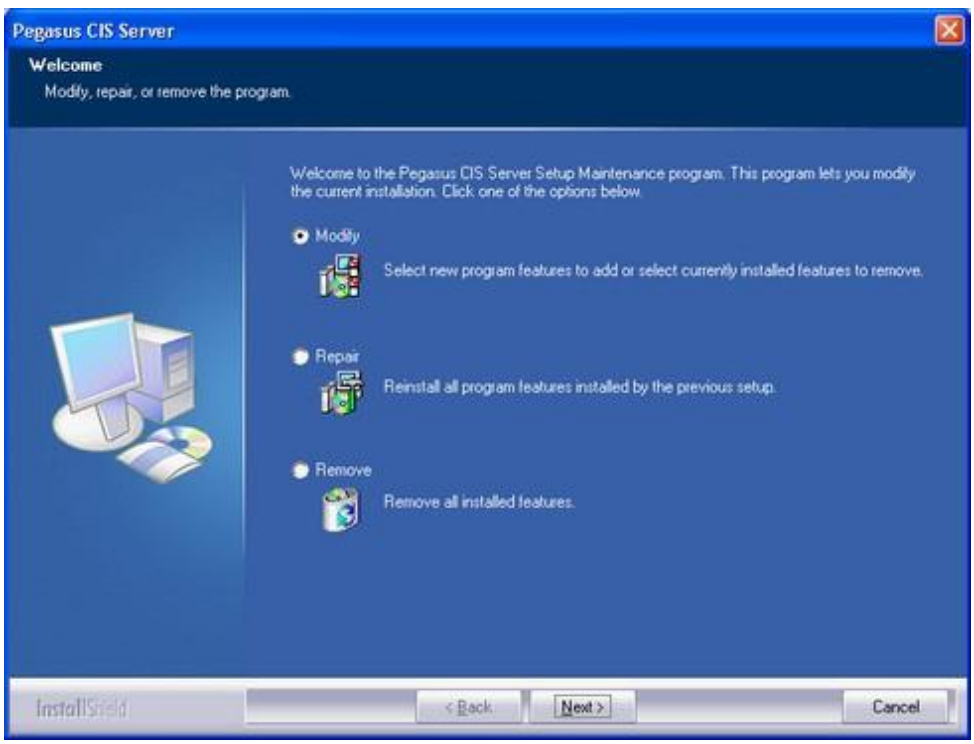
To launch the modification routine:

1. Click Start and select Settings
2. Select Control Panel
3. Select Add/Remove Programs
4. Select Pegasus CIS Server from the list (see above)
5. Click Change/Remove

The Install Shield Wizard will take you through the following Steps:

11.1 Welcome Screen

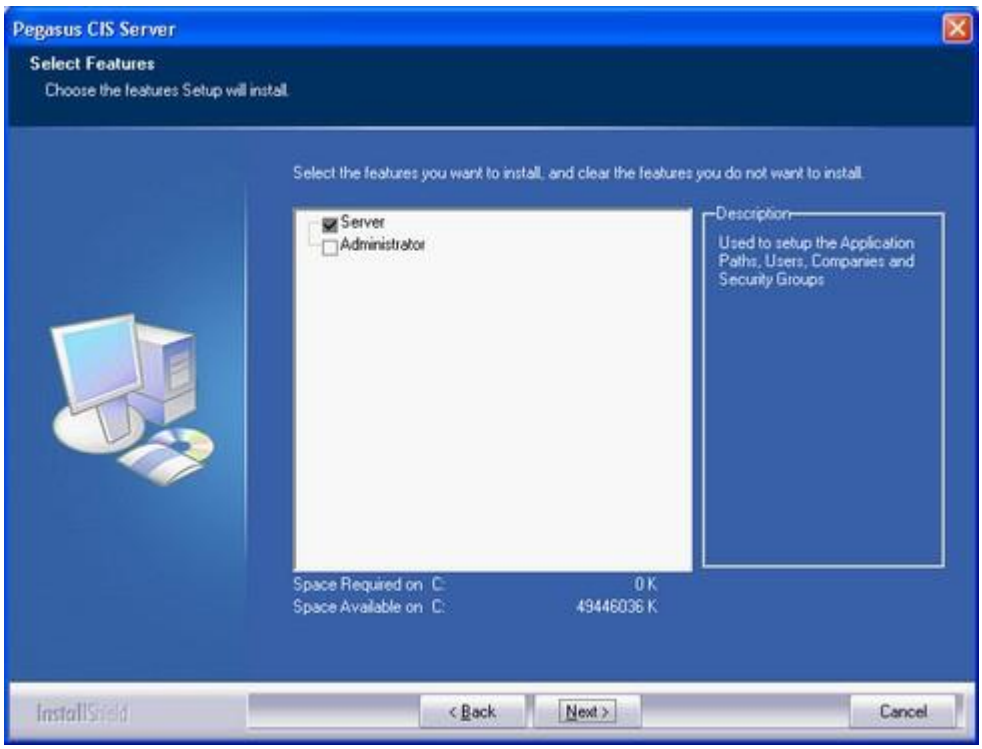
The first part of this routine allows you to choose what action you would like to take:



Select 'Remove' and click 'Next'

11.2 Select Features

You now have the option to select what applications are going to be installed/removed. Once you have adjusted your feature selection click 'Next' to continue:

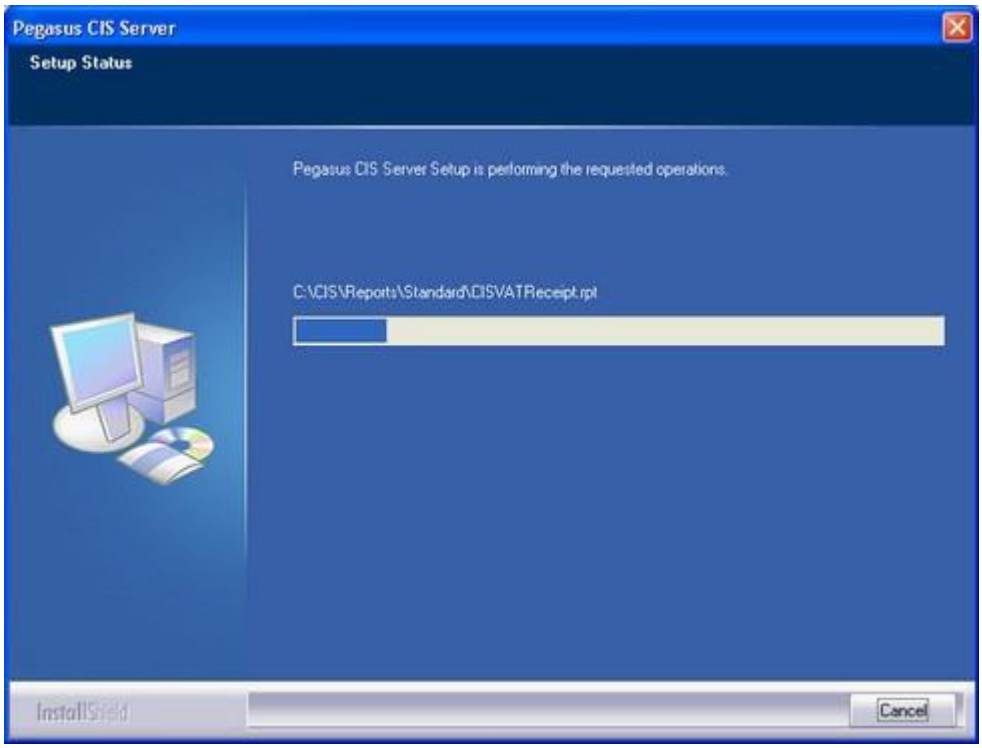


NOTES:

1. As the Server feature is mandatory you can only Add or Remove the Administrator program. To Remove the Server you must fully Remove the whole Server Installation.
2. It is recommended that you keep the Administrator program installed on the Server to aid system maintenance.

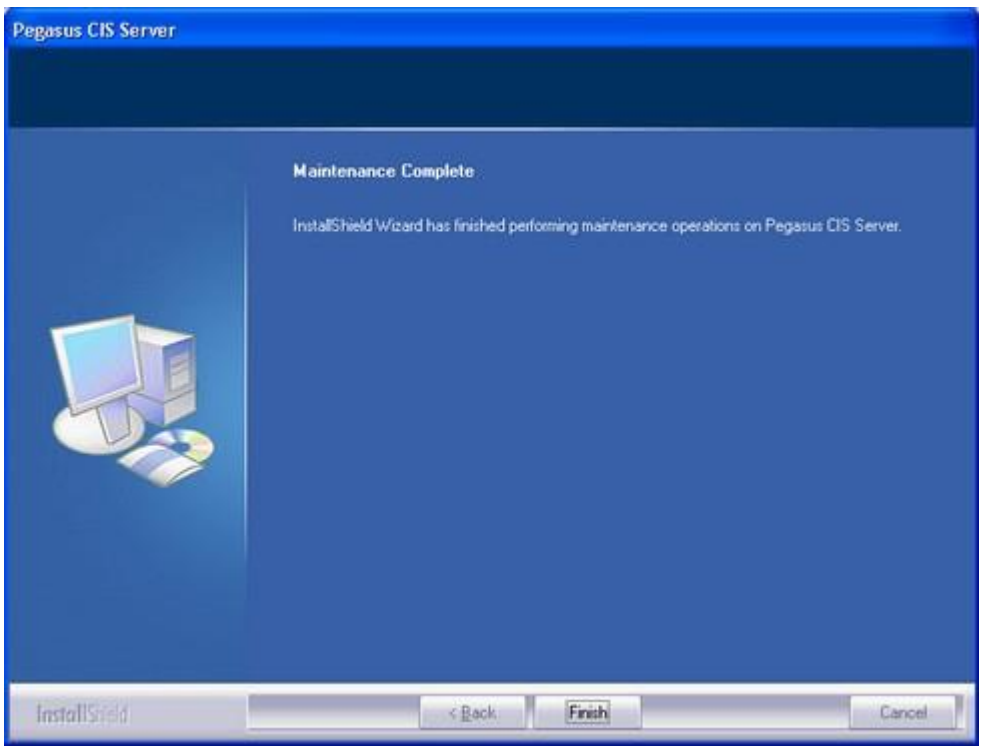
11.3 The Modification Progress

This process will extract and install any files required by newly selected features and removes files no longer needed by features that have been removed:



11.4 Modification Complete

Once all files are extracted and installed/uninstalled the system will prompt that the 'Maintenance Installation' of Pegasus CIS is complete. Click the Finish button to close the Setup Window:



12 Server Upgrade

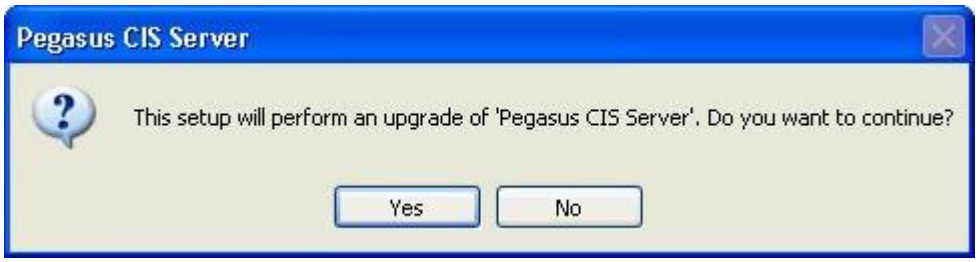
Server Upgrades should be installed on the same machine that the original installation was performed on.

To start the Pegasus CIS Server Upgrade

1. Insert the CD into the CD drive and run Setup.exe
2. Follow the instructions on the screen

NOTE: It is also possible to copy the contents of the CD-ROM to a folder on the server and run the set-up program from there.

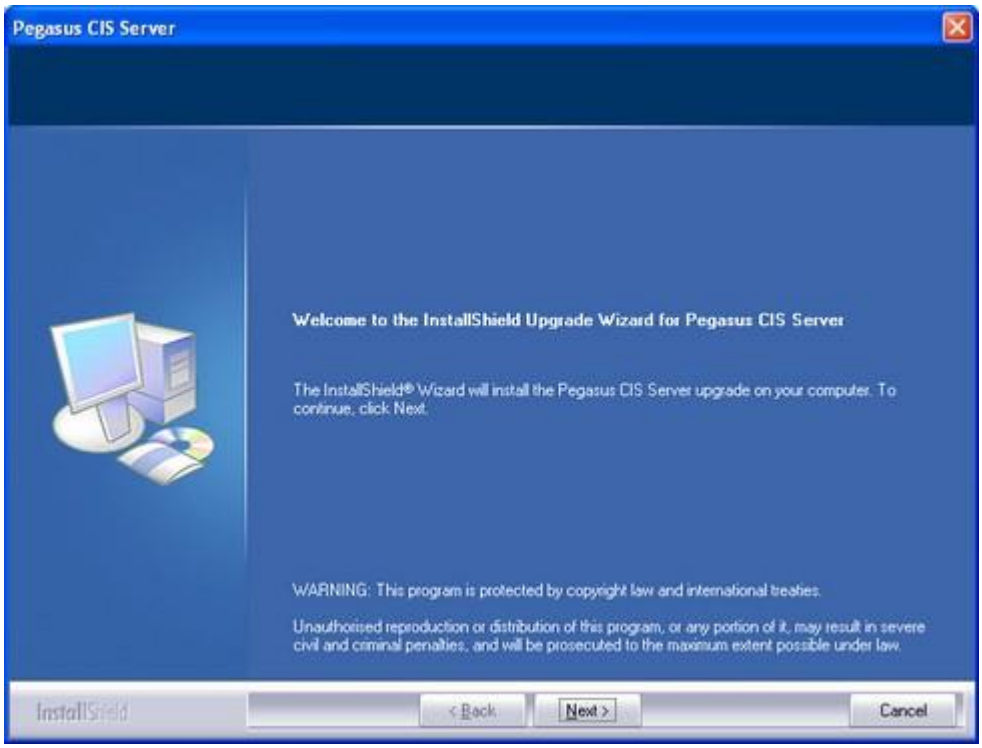
When the program initially runs it will prompt to confirm that an Upgrade to Pegasus CIS Server will be performed:



Click 'Yes' and Pegasus CIS prepares the Install Shield Wizard that will install the upgrade to the same location as the original installation:

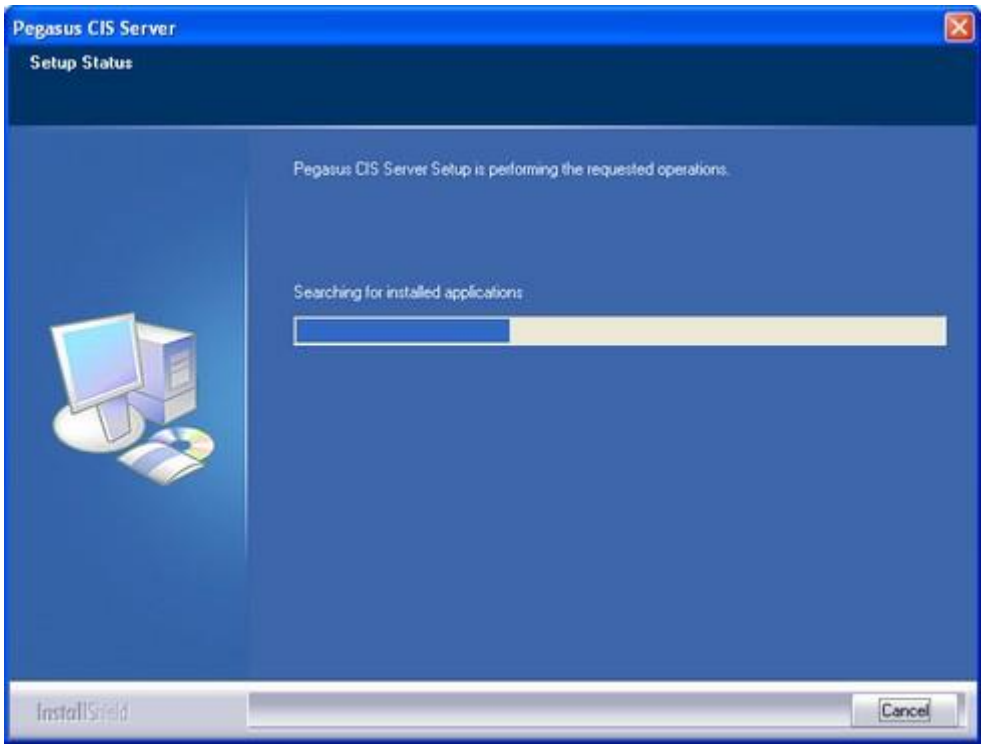
12.1 Welcome Screen

The first part of the setup confirms that you are about to install an upgrade to the Pegasus CIS Server. Select 'Next', to continue:



12.2 The Upgrade

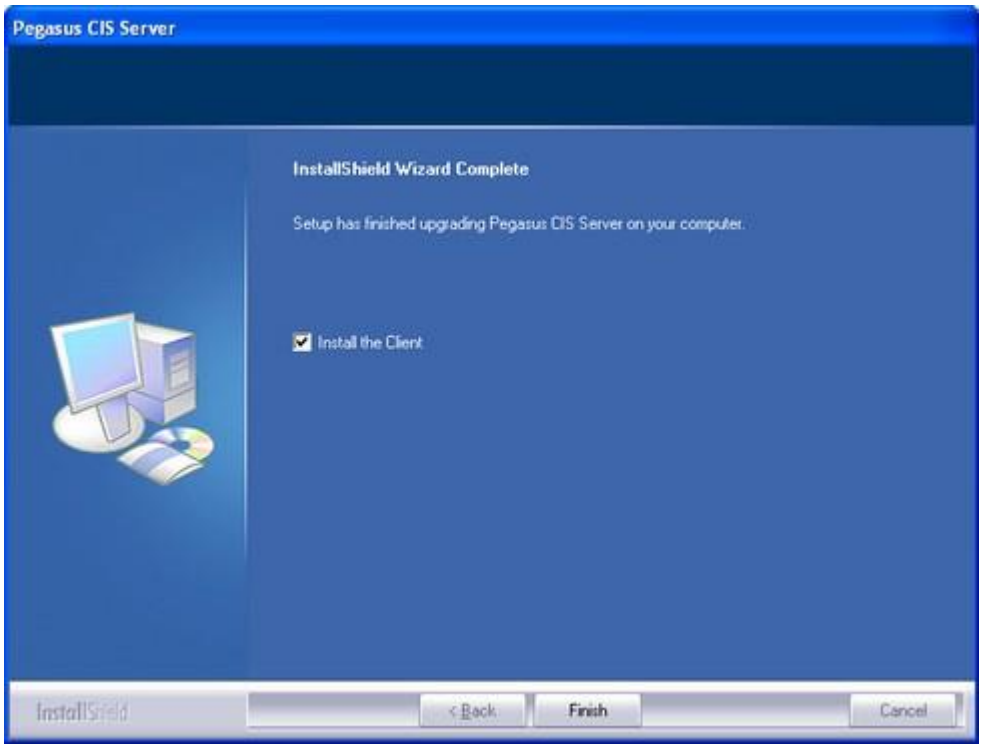
This process will extract and install all of the files that have been updated since the last Server Installation:



12.3 Upgrade Complete

Once all files are extracted and installed the system will prompt that the 'Server Upgrade' of Pegasus CIS is complete.

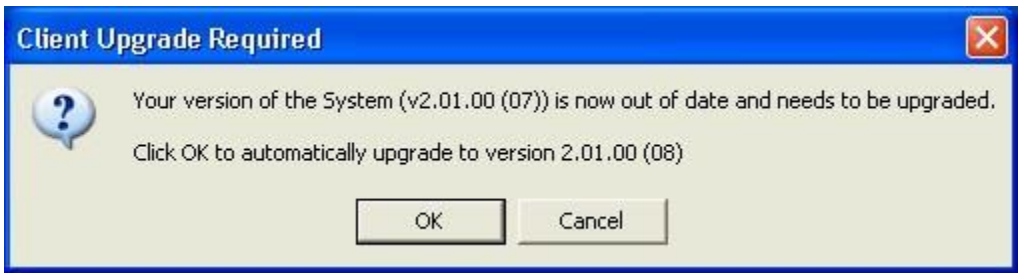
The final stage of the installation gives you the option to install the Application Client. If you tick the 'Install the Client' box then the Server Install will automatically run the Client Installation routine for you once you click the Finish button:


Pegasus CIS Server
InstallShield Wizard Complete
Setup has finished upgrading Pegasus CIS Server on your computer.
Install the Client
InstallShield
< Back
Finish
Cancel

13 Client Upgrade

13.1 Client Auto-Upgrade

The preferred way to upgrade Client Installations on Workstation PCs is to use the Auto-Upgrade feature of Pegasus CIS. With this enabled, once a new version has been installed, the next time an older version of Pegasus CIS is run the user will be prompted to automatically upgrade:



To enable the Auto-Upgrade feature:

- The new Client must have been manually installed and run at least once so that the System files held on the server are updated with information about the new version. It is therefore recommended that this is done as routine when performing the Server Upgrade, for example:
    1. Install the Server Upgrade
    2. When complete, tick 'Install the Client' and click 'Finish'
    3. Install the Client Upgrade
    4. When complete, tick 'Run Pegasus CIS' and click 'Finish'
    5. As soon as the Login prompt is visible the System files on the server have been updated and the Clients will know that they need to upgrade
- The "Client Upgrade Path" in the Administrator program must point to a folder that contains a valid Installation routine.

NOTES:

1. The user logged in to the workstation at the time of upgrade needs to have appropriate Windows Permissions or the Installation routine will be unable to register the updated Client files.
2. An alternative to using the Auto-Upgrade feature of Pegasus CIS is to use 'Group Policies' on the Server to authenticate the Windows Installer Installation Package ('Pegasus CIS.msi') and distribute or 'push' the setup out to each Workstation with elevated installation privileges.

13.2 Manual Client Upgrade

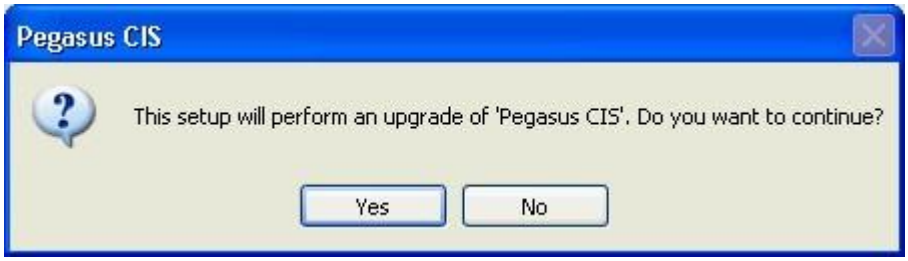
If for whatever reason the Auto-Upgrade feature of Pegasus CIS cannot be enabled then a manual process can still be used.

After the Server Upgrade has been installed on the Server, the Setup directory on the server will contain an updated Client Installation routine. Browse to "\\ServerName\CIS\Setup" using Windows Explorer, or alternatively, if you have setup a mapped drive to the CIS Network Share you can go directly to "X:\Setup" where X is the drive letter of the mapped drive. To launch the Client Upgrade run "Setup.exe".

NOTES:

1. Setup.exe held in the CIS\Setup folder is the same executable used to perform a full Client Install on a clean Workstation. For workstations that already have a version of the Pegasus CIS Client installed, the Installation routine will search for a previous installation and perform an Upgrade only.
2. Failure to install the Client Upgrade on a PC attempting to run Pegasus CIS will experience errors with unregistered components. Standalone PC's wishing to run Pegasus CIS MUST have both a Server installation AND a Client Installation.

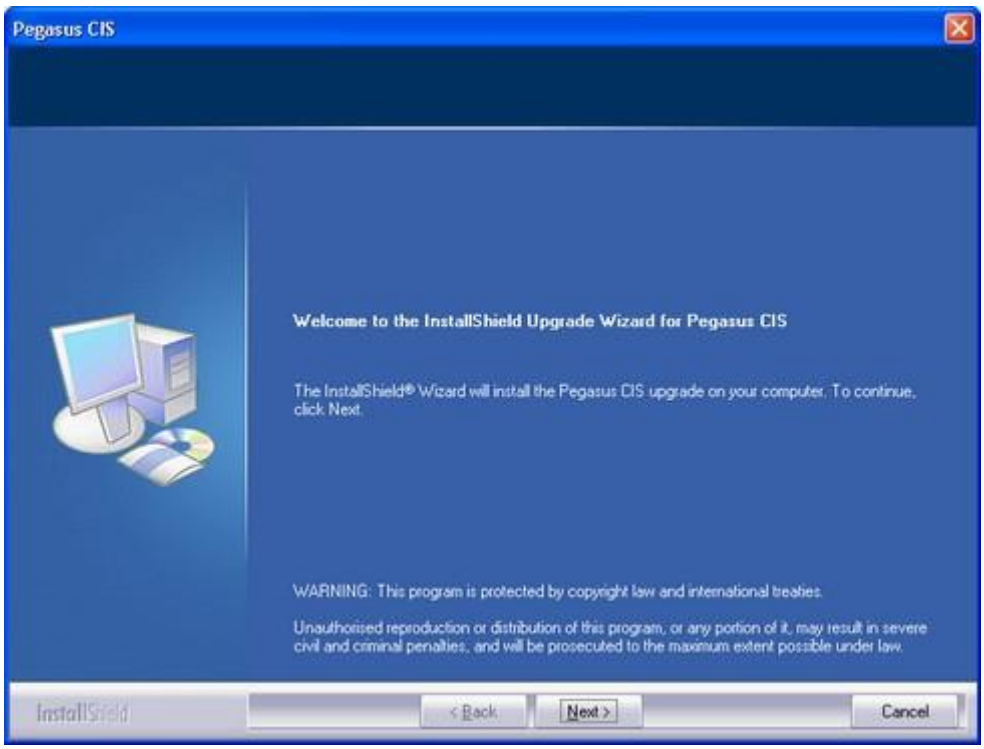
When the program initially runs it will prompt to confirm that an Upgrade to Pegasus CIS will be performed:



Click 'Yes' and Pegasus CIS prepares the Install Shield Wizard that will install the upgrade to the same location as the original installation:

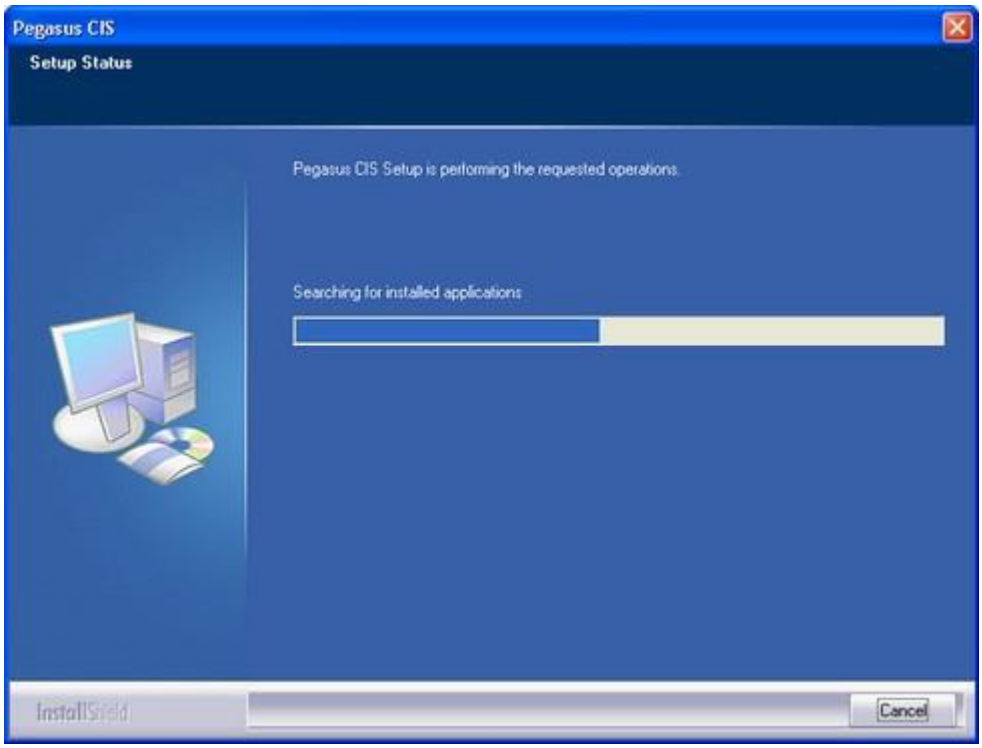
13.3 Welcome Screen

The first part of the setup confirms that you are about to install an upgrade to the Pegasus CIS. Select 'Next', to continue:



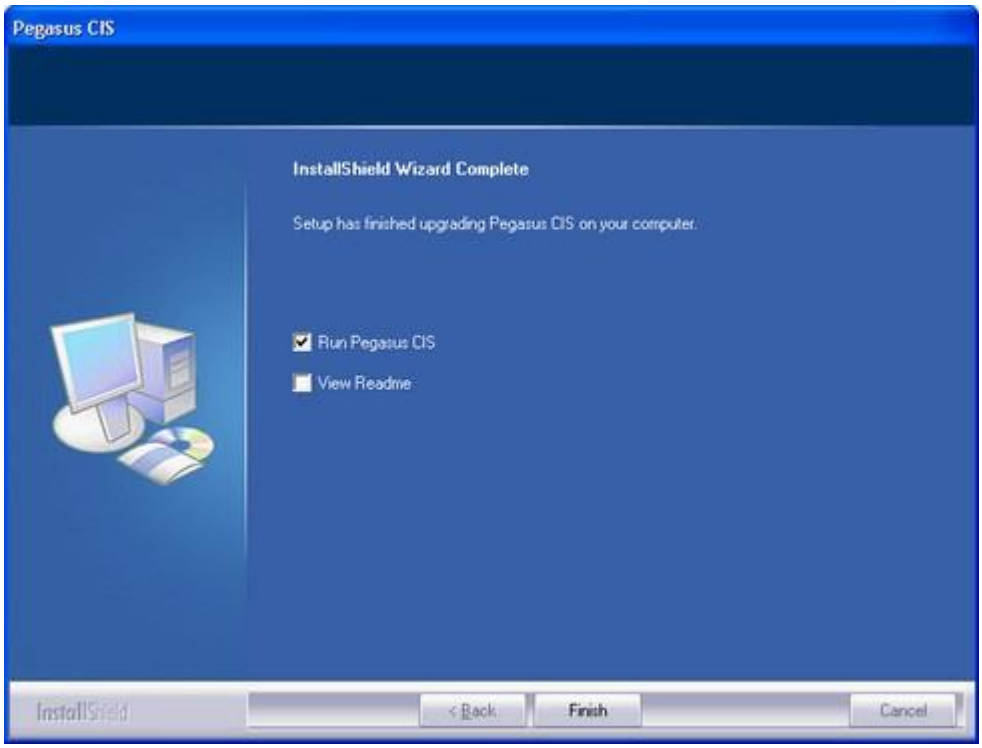
13.4 The Upgrade

This process will extract and install all of the files that have been updated since the last Client Installation:



13.5 Upgrade Complete

This screen gives you the option to launch Pegasus CIS and view the Readme file. Tick the relevant boxes then click Finish:



NOTE: We would recommend viewing the Readme file as this file contains relevant information on the version you have just installed.