

online filing manager

Installation Guide



Online Filing Manager
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Manual published by:

Pegasus Software
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Installation Guide

Introduction

This guide provides information concerning the installation and configuration of Online Filing Manager. It assumes you are conversant with PCs and networking environments, and have prerequisite knowledge of Microsoft Windows and other software environment applications identified in this guide.

Other Online Filing Manager Guides and Help

Readme File

A Readme file is provided with each release and can be accessed from the Start menu or Desktop folder after installation. This document contains Late Breaking News and any other release specific important information.

Online Filing Manager Help

The Online Help provides details of all functions available in the application. It is available as HTML Help and is intended to be accessed whilst using the application. It can also be accessed from the Windows Start menu after installation.

Feedback

Pegasus is interested to hear your views on the documents we provide. To give your feedback, send an email to feedback@pegasus.co.uk. Please type "Online Filing Manager Install Guide" in the subject box.

Please note that product support is not offered through the above email address.

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New Installations

This chapter describes the steps you need to follow to install Online Filing Manager for the first time.

Online Filing Manager is designed to be used by one user at a time. It must be installed and run from a local client computer, not from a network location.

Before starting the installation, close as many applications as possible and read the 'Readme.html' file for any late breaking information.

To Start the Installation

You can start the installation by using the Setup menu on the Opera 3 or Opera II CD. The menu displays links to print user guides and install Online Filing Manager. The menu is displayed when the CD is inserted into the CD drive. If it is not, run `menu.exe` from the CD.

From the Setup menu you can:

- View this Installation Guide and Readme file.
- Install Online Filing Manager for the first time or upgrade from an earlier version of Online Filing Manager.

You can also install the product by doing one of the following:

Using the Windows Start button:

- i. Click the Windows Start button.
- ii. In the **Search programs and files** box type "d:\Online Filing Manager\setup.exe" in the **Open** box (where *d* is the letter that identifies the CD drive). Include the quote marks. Then follow the on-screen instructions.

Using Windows Explorer:

- i. Open Windows Explorer by right-clicking on the Windows **Start** button and selecting **Open Windows Explorer**.
- ii. Click on the Opera 3, Opera II or Pegasus CIS CD.
- iii. Open the **Online Filing Manager** folder.
- iv. Double-click `Setup.exe` to display the Online Filing Manager Setup menu.

Installing Online Filing Manager

1. In the Online Filing Manager Setup menu, click the **Install Online Filing Manager** option.
2. The InstallShield Wizard is displayed. At any stage of the wizard (up until the installation itself), you can click **Back** to review or change any of the settings.
3. Follow the instructions on the screen.

Stage 1 – Welcome

The Welcome screen is displayed. Read the contents of the Welcome screen, and click **Next** to continue the installation.

Stage 2 – Destination Folder

The next dialog shows the drive and folder location in which the software will be installed. If you want to accept the default shown, click **Next**. If you want to change the location, click **Change** and select the required location before you continue.

Stage 3 – Ready to Install

If you want to review or change any of the installation settings, click **Back**. Otherwise click **Install** to begin the installation.

Stage 4 – Installing

The installation program installs Online Filing Manager.

Stage 5 – Installation Completed

The next step depends on whether your computer needs to be restarted before you can use the software. If the installation program determines that your computer must be restarted before you can use Online Filing Manager, a dialog is displayed giving the option of restarting your computer now, or quitting the setup and restarting the computer later. If this dialog is displayed, you must restart your computer before using Online Filing Manager.

Click **Finish** to complete the installation. You can now use Online Filing Manager.

Stage 6 – Security settings

The final step is to set the security permissions to the Online Filing Manager Dynamic Data (Read/Write) location, which by default is `c:\Program Data\Pegasus\OFM`.

Open the *OFM* folder and right-click to open the **OFM Properties** form. Select the **Security** tab, choose the user and then select the **Edit** button to open the **Permissions** form for that user. Tick the **Full Control** box and select **OK** twice to close both the **Permissions** and the **OFM Properties** form.

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Upgrading from earlier versions

Before starting the upgrade, close as many applications as possible and read the Readme file for details of the release and any late breaking information. The Installation Setup menu displays a link to print the Readme file.

If you are currently using an earlier version of Online Filing Manager, the programs will be upgraded to the later version during the installation.

You can start the installation from the Opera 3, Opera II or Pegasus CIS CD by doing one of the following:

- **Using the Windows Start button:**
 - i. Click the Windows Start button.
 - a. Type the following command in the **Search programs and files** box (where *d* is the letter that identifies the CD drive):

```
"d:\Online Filing Manager\setup.exe"
```
 - ii. Click **OK** to start the installation.
 - iii. Follow the instructions on the screen once the installation has started.
- **Using the Windows Explorer:**
 - i. Open Windows Explorer.
 - ii. Click on the Opera II, Opera 3 or Pegasus CIS CD.
 - iii. Click on the Online Filing Manager folder.
 - iv. Double-click `Setup.exe` to start the installation.
 - v. Follow the instructions on the screen once the installation has started.

To upgrade Online Filing Manager

1. In the Online Filing Manager Setup menu, click the **Install Online Filing Manager** option.
2. The InstallShield Wizard is displayed. Follow the instructions on the screen and click **Next** to start the upgrade installation.
3. If the upgrade installation program determines that your computer must be restarted before you can use Online Filing Manager, a message is displayed giving the option of restarting your computer now, or quitting the setup and restarting the computer later. If this message is displayed, you must restart your computer before using Online Filing Manager.
4. Click **Finish** to complete the upgrade installation, and then click **Exit** on the Online Filing Manager Setup menu.

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Starting Online Filing Manager

1. Click the Windows **Start** menu button.
2. On the Programs menu, locate Pegasus OFM, and click **Online Filing Manager**.

Refer to the Online Filing Manager Help for information about using the application. You can view this by pressing F1 in the application or by clicking the link on the Help menu.

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Uninstalling Online Filing Manager

Follow these instructions to remove Online Filing Manager from the computer.

1. Open the Windows Control Panel.
2. Click **Programs and Features**.
3. Select **Pegasus OFM** from the list.
4. Click **Uninstall**.
5. Follow the on-screen instructions.

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Files, folders and programs

On installing Online Filing Manager, various files, folders and programs are distributed according to the installation options and configuration of your computer.

The following list identifies some of the major elements of the installation (but not all files), some of which are referred to in other sections of this guide.

Folders for static data (read-only)

By default, read-only data is installed in the following locations:

32-bit Windows	c:\Program Files\Pegasus\OFM
64-bit Windows	c:\Program Files (x86)\Pegasus\OFM

This folder contains the Online Filing Manager executable program, and the following subfolders:

Folder	Purpose
Help	The folder in which the Help files are located.
User Documents	The folder in which the Installation Guide is located.

Folders for dynamic data (read/write)

Dynamic data for the Online Filing Manager is maintained in the following locations:

c:\Program Data\Pegasus\OFM

The following table describes the subfolders under this location:

Folder	Purpose
Data	The folder that can be used to store the source payroll information file.
Audit	The folder in which Online Filing Manager stores copies of the files sent to and received from the Government Gateway.

Programs

Online.exe	The executable program for Online Filing Manager.
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Other files

Online Filing Manager.chm	The HTML Help for Online Filing Manager.
Pegrel.txt	The Online Filing Manager Release file.
Readme.html	The Readme file that accompanies the software containing details any late-breaking information.