



Document Management Installation Guide



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Installation Guide

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Document Management Installation Guide

Introduction

About this Guide

This Installation Guide provides information concerning new installations of Document Management, upgrades from earlier versions, and the initial configuration of Document Management. Where 'Opera' is used in the guide this refers to both Pegasus Opera 3 and Pegasus Opera II. The guide should be used when installing Document Management for both products.

The guide assumes you are conversant with supported Windows Server environments and have prerequisite knowledge of Microsoft SQL Server.

Getting the Software

The software is available for Pegasus partners to download using Infor Extreme and for customers using the Infor Download Center.

Software Requirements Guide

This guide lists the supported software products and environments for the latest available versions of Opera 3 and Opera II, including the supported editions of Microsoft Office, Microsoft SQL Server, Microsoft Windows Server and desktop editions, and web browsers.

This guide is available on the Opera 3 Guides page at docs.pegasus.co.uk.

About Document Management

Document Management is a fully integrated Opera module providing highly efficient and secure document capture and retrieval functionality throughout Pegasus Opera. Paper documents and electronic documents can be captured and securely archived as part of a company's document management processes and procedures.

Documents can be captured and retrieved at the point of transaction posting or captured in batch through the Document Management module. When capturing or retrieving in another module, for example the Purchase Ledger, all document type selection and indexing is managed such that there is the minimum of additional clicks or data entry. In addition, automatic document type and indexing functionality is available with the use of bar coding.

Document Management Desktop

Document Management Desktop is installed with Document Management and works directly from your Microsoft Windows desktop. Each installation of Document Management includes one Document Management Desktop user. If you require more people to use Document Management Desktop, there is additional cost for each user.

Document Management Desktop is both an easy retrieval system of paper documents and electronic files that have been captured to the Document Management databases and an ad-hoc capture system to quickly capture electronic files to the Document Management databases. Document Management Desktop needs access to both the Opera Server installation and the Document Management databases. However, the Opera Client installation does not need to be installed.

Document Management Desktop is a secure application – you have to log on using a user ID that is created in Opera. Even if you are someone who does not use Opera, your system administrator still needs to create an Opera login ID for you to use Document Management Desktop. An Opera installation includes a certain number of users. For example, an Opera five-user system means that five people can use Opera at the same time. However, more user IDs can be set up if necessary to use in Document Management Desktop.

Installing Document Management

Document Management is installed independently of Opera. It consists the Server installation and the Client installation:

- The server software is installed from the Opera setup menu. Run the *Menu.exe* command from the installation files folder.



- The client software is installed from a folder on the file server after the server software is installed. If you use the suggested installation location, the folder is either:
- c:\Program Files\Pegasus\Document Management\ClientSetup (32-bit Windows)
- c:\Program Files (x86)\Pegasus\Document Management\ClientSetup (64-bit Windows)

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Installation Prerequisites

You must be logged into the computer with Administrator privileges to install the Document Management Server or Client installations. In addition, these prerequisites must be set up before Document Management is installed.

Pegasus Opera

Pegasus Opera 3/II must be installed before Document Management is installed. Document Management must be installed on the same computers as the Opera file server and workstation computers.

Regional Settings

To avoid any issues with capturing and storage of dates, make sure that all computers are set to English regional settings.

Microsoft .Net Framework

Microsoft .Net Framework v2 must be installed on all server computers and client computers before Document Management is installed.

Windows Installer

Microsoft Installer version 3 or above must be installed. It is normally installed with the operating system. However, if you need to, you can install it from the Microsoft site at www.microsoft.com/downloads/details.aspx?FamilyID=5fbc5470-b259-4733-a914-a956122e08e8&displaylang=en

Database Engine

You must ensure Microsoft SQL Server is installed and available on the network. If it is not, install and configure it prior to installing Document Management.

Please check the Software Requirements guide at docs.pegasus.co.uk for details of supported versions of Microsoft SQL Server.

Microsoft Office Document Imaging (MODI)

Advanced Document Management includes a feature called *Content Indexing*. This captures machine typed text from scanned images or *.txt* and *.doc* electronic files and uses the text to index the document.

Prerequisites

- Microsoft Office Document Imaging (MODI) - indexing the content of scanned images relies on Microsoft Office Document Imaging (MODI). It is normally installed when Microsoft Office is installed. MODI must be installed on each Opera client computer that uses Content Indexing and on the Opera server.
- Microsoft Word - indexing *.txt* and *.doc* electronic files relies on Microsoft Word being installed.

MODI is not included with Microsoft Office 2010. However, you can download it from the Microsoft website at support.microsoft.com/kb/982760.

To Check if Microsoft Office Document Imaging is installed

1. On the Windows Start menu, click **Programs - Microsoft Office**.
2. Click Microsoft Office Tools. If MODI is installed, *Microsoft Office Document Imaging* will be displayed in the menu.
3. If MODI is not installed, you should update your Microsoft Office installation from the Control Panel.

To Install Microsoft Office Document Imaging

1. From the Windows Start menu, click **Control Panel**.
2. Select **Programs** and then select **Programs and Features**.
3. Select **Microsoft Office Professional** and click **Change**.
4. Select **Add or Remove Features**, and then click **Continue**.
5. Expand the **Office Tools** option and then select **Microsoft Office Document Imaging Writer**.
6. Click **Continue** and then follow the on-screen instructions to finish the update.

Important: MODI must be installed on both the server and client computers.

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Microsoft SQL Server configuration settings

Pegasus Document Management also works with the free Express edition of Microsoft SQL Server. This is available for download from the Microsoft web site. For information about this edition of Microsoft SQL Server and links to download the software, please refer to www.microsoft.com/express/Database.

SQL Server Configuration Manager

SQL Server Configuration Manager provides basic configuration management for SQL Server services, server protocols and client protocols.

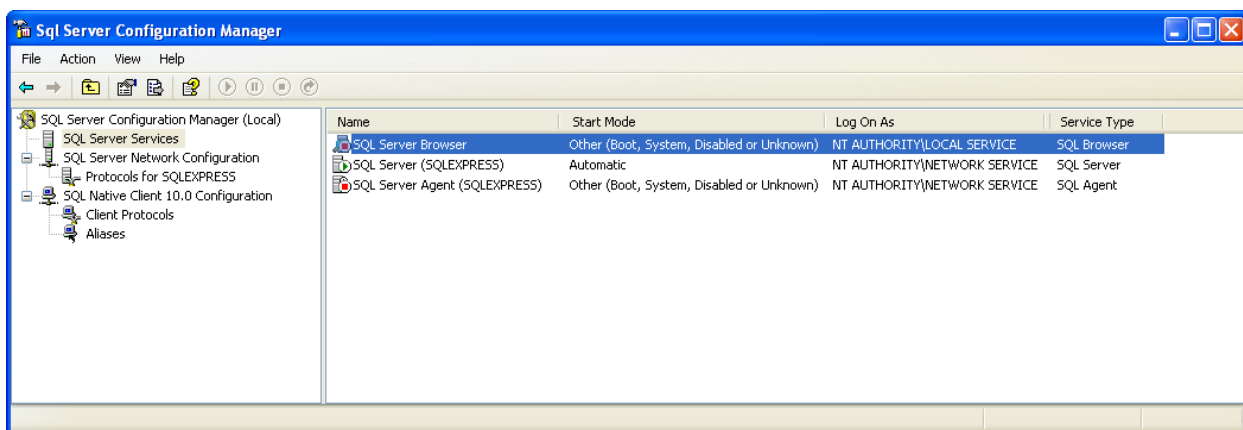
The following services must be started before Document Management is used (the screen may look different in the version of SQL Server you are using):

SQL Server Services

SQL Server Browser

SQL Server

SQL Server Agent



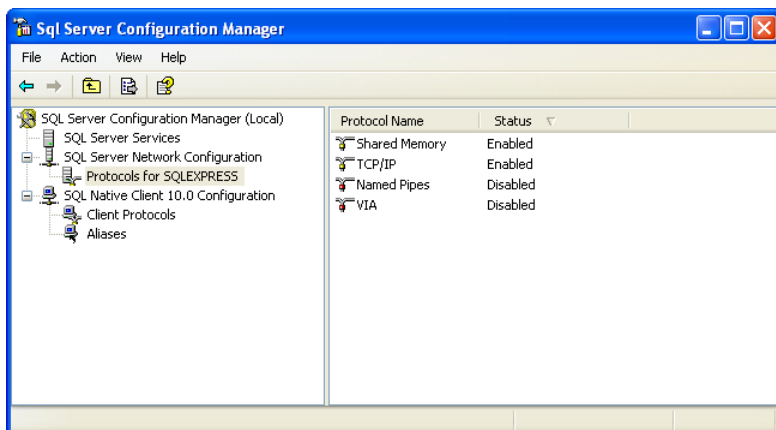
The following protocols must be enabled before Document Management is used:

SQL Server Network Configuration

Protocols for SQL Server

Shared Memory: *Enabled*

TCP/IP: *Enabled*



Document Management does not rely on other services and protocols being started or enabled.

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Server Installation

Important: You must not run the server setup across a network; it must be setup from the file server.

Before Running the Installation

Ensure all the [Installation Prerequisites](#) for Document Management are installed, including Opera and Microsoft SQL Server.

Installing Document Management Server Software

The Document Management server software must be installed on the same file server as the Opera server software.

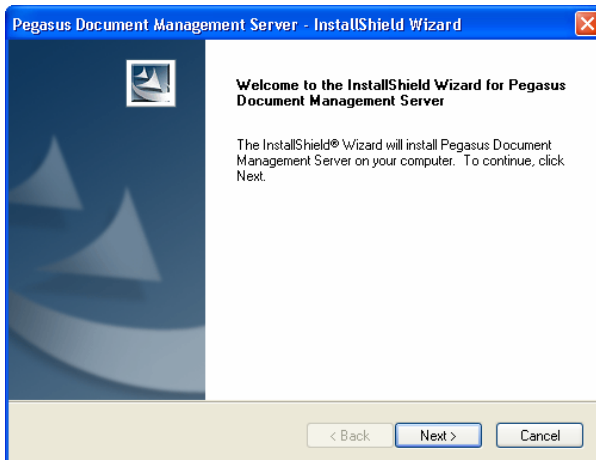
To Install the Server Installation

1. Run the *Menu.exe* command from the installation files folder. The Opera Setup menu is displayed.
2. Click Pegasus Document Management.
3. Click Install Document Management.
4. Follow the instructions on the screen.



Stage 1 - Welcome

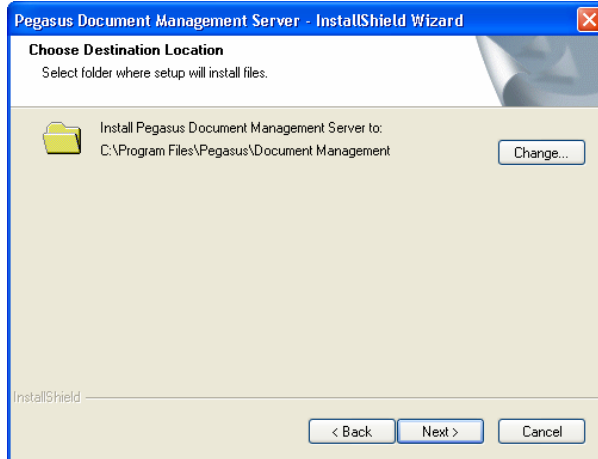
The server setup starts with the Welcome screen.



Click **Next** to continue.

Stage 2 - Destination Location

The default installation location for the server installation is *c:\Program Files\Pegasus\Document Management* (32-bit Windows) or *c:\Program Files (x86)\Pegasus\Document Management* (64-bit Windows). Click the **Change** button if you want to select an alternative location.



Then click **Next** to continue.

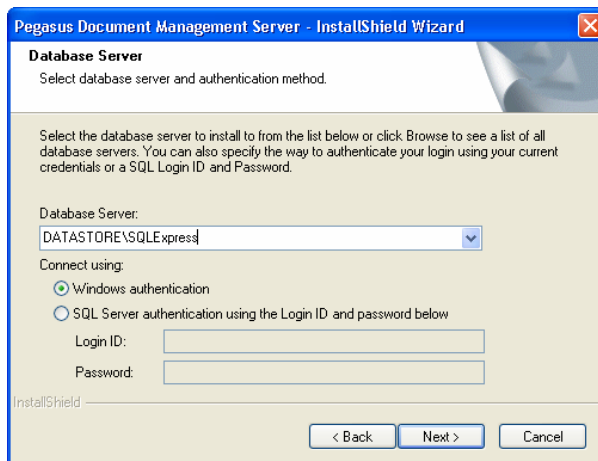
Stage 3 - Database Server

You now need to enter the name of the SQL Server and choose whether to use Windows authentication or SQL Server authentication.

1. Enter a valid **SQL Server** name. The setup does not check whether the name is correct. If you are using Express editions for the data store, the **SQL Server** name you enter is the computer's name followed by the *instance name* for the SQL Server installation.

Important: The default instance name used during the installation of SQL Server Express is 'SQLExpress'. If a computer's name is 'DATASTORE' and the default instance name is used, the SQL Server name is 'DATASTORE\SQLExpress.' If you are unsure of the SQL Server name, run **Microsoft SQL Server Management Studio Express** to check before continuing with the installation of Document Management.

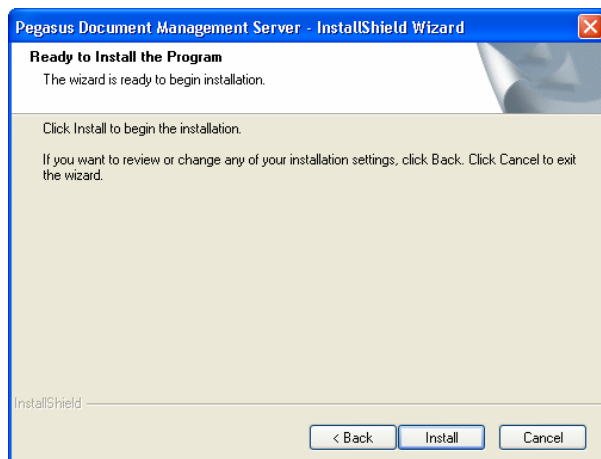
2. Choose the type of authentication you want to use.
3. Click **Next**.



Stage 4 - Ready to Install

After the SQL Server and authentication method has been selected, the setup can begin to install the program files on the file server. If you want to review or change any of the installation settings, click **Back** before continuing.

It may take a few minutes to install all the program files.

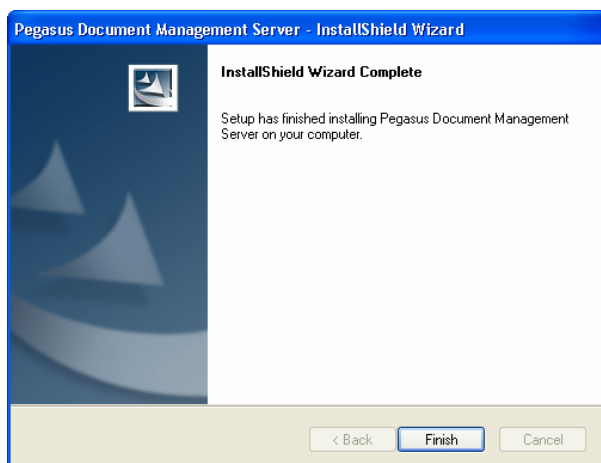


Click **Install** to start the setup.

Stage 5 - Installation Completed

The setup has installed all the Document Management server files.

You must now run the client setup on the server computer. The setup also creates a network share so that client computers can access the programs on the file server, and the setup installation can be run for each client computer.



Click **Finish** to close the form.

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Client Installation (Same computer as Server installation)

The client software needs to be installed after the server software has been installed. The client setup program is in the *ClientSetup* folder in the destination location chosen in [Stage 2](#) of the server installation.

Before Running the Installation

Ensure all the [Installation Prerequisites](#) for Document Management are installed, including the latest Opera client software.

Installing Document Management Client Software

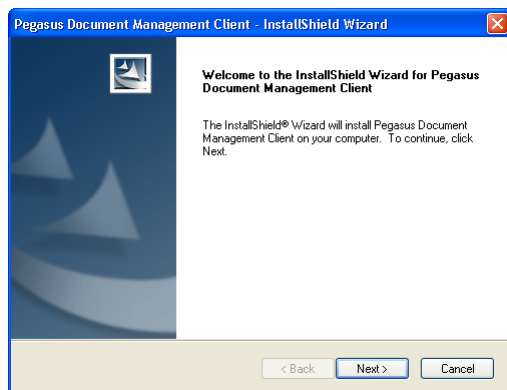
The Document Management client installation must be installed on the same computer as the Opera client installation.

To Install the Client Software

1. On the file server, navigate to the Document Management server folder chosen in [Stage 2](#) of the server installation. The default installation location for the server installation is *c:\Program Files\Pegasus\Document Management* (32-bit Windows) or *c:\Program Files (x86)\Pegasus\Document Management* (64-bit Windows).
2. Open the **ClientSetup** folder.
3. Run Setup.exe.
4. Follow the instructions on the screen.

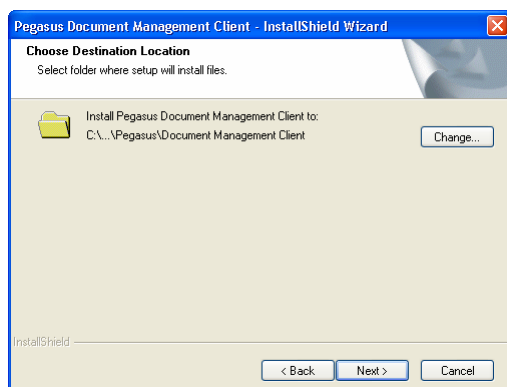
Stage 1 - Welcome

The server installation starts with the Welcome screen. Click **Next** to continue.



Stage 2 - Client Installation location

The default installation location for the client installation is *c:\Program Files\Pegasus\Document Management Client* (32-bit Windows operating systems) or *c:\Program Files (x86)\Pegasus\Document Management Client* (64-bit Windows operating systems). Click the **Change** button if you want to select an alternative location.

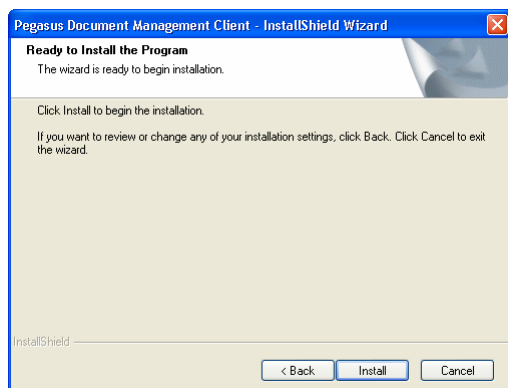


Click **Next** to continue.

Stage 3 - Ready to Install

After the client installation location is selected, the setup can begin to install the program files on the client computer. If you want to review or change any of the installation settings, click **Back** before continuing.

It may take a few minutes to install all the program files.

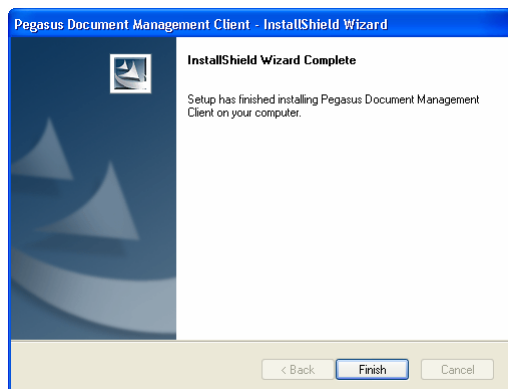


Click **Install** to start the setup.

Stage 4 - Installation completed

The setup has installed all the Document Management client files and installed an icon on the computer's desktop for Document Management Desktop.

You are now ready to use Document Management on the file server and install Document Management client software on Opera client computers.



Click **Finish** to close the form.

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Client Installation (On a different PC to the server installation)

The client software needs to be installed on each Opera client computer after the Document Management server and client software have been installed on the Opera file server.

The client setup program is in the *ClientSetup* folder in the destination location chosen in [Stage 2](#) of the server installation. The setup is accessed via a network share created during the installation on the file server.

Important: To install the client software from the server you may need to check the firewall settings on each client computer, particularly if strict firewall settings are in place on the computers. A firewall is software or hardware that checks information coming from either a network or the internet and then either blocks it or allows it to pass through to the computer, depending on how the firewall is set up.

It may be necessary therefore to explicitly allow the client software *Setup.exe* file on the server to be run from the client. The firewall settings are sometimes controlled by network Group Policy, which will be managed by the system administrator.

Before running the installation

Consider the following before running the client setup:

- All the [Installation Prerequisites](#) for Document Management must be installed, including the Opera client software.
- The Document Management client setup must be run on the Opera file server before installing it on Opera client computers.
- You must be logged on as an Administrator or as someone with Administrator's rights.

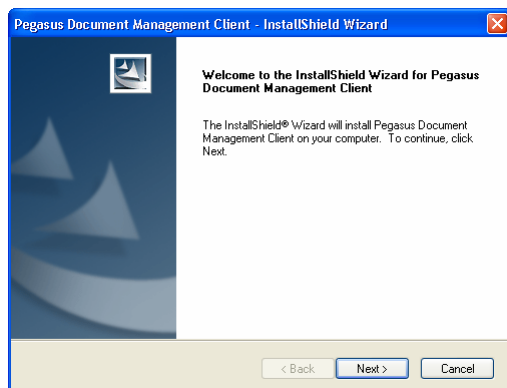
Installing Document Management client software

To install the client software

1. Navigate to the Document Management folder on the file server chosen in [Stage 2](#) of the server installation. The default location is `\\Fileserver\Document Management` (where *Fileserver* is the name of the Opera file server).
2. Open the **ClientSetup** folder.
3. Run Setup.exe.
4. Follow the instructions on the screen.

Stage 1 - welcome

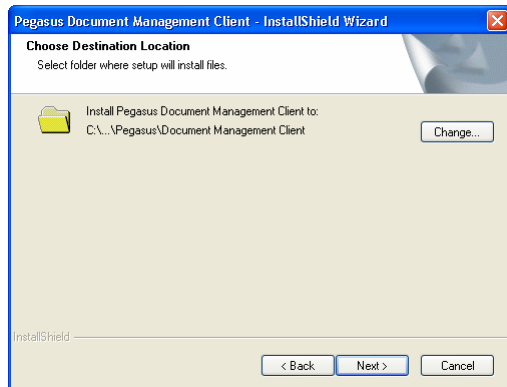
The server installation starts with the Welcome screen.



Click **Next** to continue.

Stage 2 - Client installation location

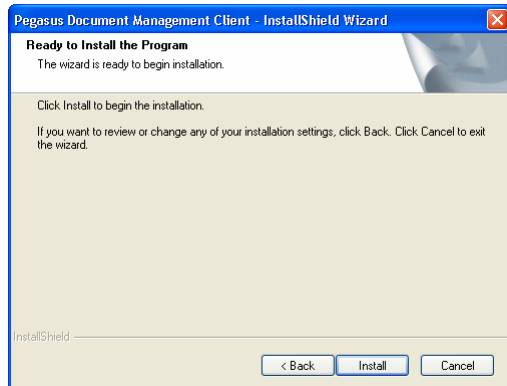
The default installation location for the client installation is *c:\Program Files\Pegasus\Document Management Client (32-bit Windows)* or *c:\Program Files (x86)\Pegasus\Document Management Client (64-bit Windows)*. Click the **Change** button if you want to select an alternative location and then click **Next** to continue.



Stage 3 - Ready to install

After the client installation location is selected, the setup can begin to install the program files on the client computer. If you want to review or change any of the installation settings, click **Back** before continuing.

It may take a few minutes to install all the program files.

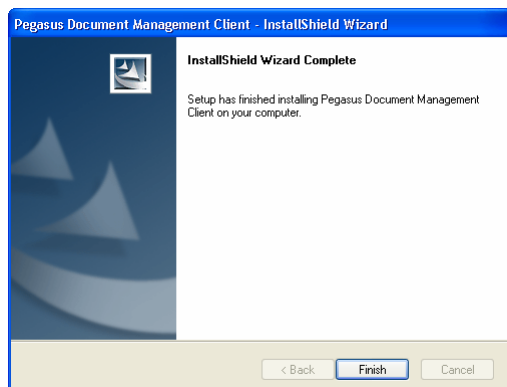


Click **Install** to start the setup.

Stage 4 - Installation completed

The setup has installed all the Document Management client files. You are now ready to use Document Management on the Opera client computer.

Important: You must run the Document Management client setup on each Opera client PC.



Click **Finish** to close the form.

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Upgrading from earlier versions of Document Management

These instructions apply for upgrades from Document Management versions.

Before running the upgrade

- Upgrade to the version of Opera that accompanies this release of Document Management.
- Make sure that everyone closes Opera.

Upgrading server installations

If the Server and Client installations are on the same computer, they both need to be upgraded to the later version of Document Management.

To upgrade the server installation

1. Run the *Menu.exe* command from the installation files folder. The Opera Setup menu is displayed.
2. Click Pegasus Document Management.
3. Click Install Document Management.
4. Follow the instructions on the screen.



Upgrading client installations

If the Server and Client installations are on the same computer, they both need to be upgraded to the later version of Document Management. If just the client is installed, only the client installation needs to be upgraded.

To upgrade the client installation

1. Navigate to the Document Management folder on the file server chosen in [Stage 2](#) of the server installation. The default location is `\\Fileserver\Document Management` (where *Fileserver* is the name of the Opera file server).
2. Open the **ClientSetup** folder.
3. Run Setup.exe.
4. Follow the instructions on the screen.

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Uninstalling Document Management

The following instructions apply to uninstalling both the Client and Server software. The Client software should be uninstalled from each client computer. If both the Client and Server software are installed on the same computer, we recommend you uninstall the Client software before uninstalling the Server software.

It will take a few minutes to remove all the program files.

To remove Document Management client and server software

1. Open the Control Panel.
2. Double-click Programs, and then Programs & Features.
3. Select Pegasus Document Management Client from the list.
4. Click Uninstall
5. Follow the on-screen instructions.
6. To remove the Pegasus Document Management Server installation from the file server, select *Pegasus Document Management Server* from the list, then depending on the Windows version in use, select **Uninstall** or **Change/Remove**.