



# OPERATIONS<sup>II</sup><sub>TM</sub>

## Installation Guide



Operations II  
Installation Guide

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Manual published by:

Pegasus Software  
Orion House  
Orion Way  
Kettering  
Northamptonshire  
NN15 6PE

[www.pegasus.co.uk](http://www.pegasus.co.uk)



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# Installation and Configuration Guide

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# Installation and Configuration Guide

## Introduction

This guide is intended to provide information concerning the installation and configuration of Pegasus Operations II. The guide covers the installation of the software on a computer intended either for a stand-alone environment or in a networked environment either as a server or a client installation.

It assumes the reader is conversant with networking environments, and has prerequisite knowledge of Microsoft Windows and other software environment applications identified in this guide.

It does not cover the installation or configuration of a network environment in any detail, though guidance is provided where certain configuration options within the environment affect the installation and operation of Pegasus software.

Your computer login ID must be part of the Administrators' group to install and configure Operations II.

## Readme File

The Readme file that accompanies the software contains late-breaking information not otherwise covered in the other guides at the time of release.

You are advised to read the contents of this file before you install or begin using the application.

You are given an opportunity to view the Readme at the end of the client installation procedure as described later. Once you have completed the installation, the Readme is installed in the folder in which the server programs are installed (for example C:\Operations II).

## Software Requirements Guide

Please check the Software Requirements Guide for details of software requirements. The guide is available from the Pegasus Info Centre. Please visit [www.pegasus.co.uk/pegasusinfocentre/](http://www.pegasus.co.uk/pegasusinfocentre/).

# Installation and Configuration Guide

## Installation and Start Up

Pegasus Operations II is designed to be installed in a network environment or as a stand-alone system. If you intend to run a client version from any computer, the client installation must take place on the computer from which you want to run it. If you try to run the **Operations.exe** program from the server installation without installing a client, you will encounter a Microsoft Visual FoxPro error. You must ensure that you have installed the client installation.

### Important Notes

- Before running the setup, close as many applications as possible. Also, review the Readme file. It will also have been installed within the folder used for the server programs.
- The folder in which the server version is installed must be shared.
- There are two ways in which you can run the Netsetup.exe program from the client computer:
  - Map a drive letter from the client computer to the server. Then locate and run Netsetup.exe on the server from the client using Windows Explorer.
  - Find the server on the network using a UNC (Universal Naming Convention) path. Then locate and run Netsetup.exe on the server from the client.
- You will be given an option to install the executable program (Operations.exe) locally on the client computer or run from the server. For optimum performance, we strongly recommend you install the client locally.

### Installation Folders

The default folders for the server installation and the client installation are the following:

#### Server installations

The default server installation folder is *C:\Operations II*. This is the same for both 32-bit and 64-bit Windows editions.

#### Client installations

The default client installation folder depends on whether the Windows product is a 32-bit or a 64-bit product:

- Clients on 32-bit Windows editions are installed by default in the *C:\Program Files\Pegasus\Operations II* folder.
- Clients on 64-bit Windows editions are installed by default in the *C:\Program Files (x86)\Pegasus\Operations II* folder.

# Installation and Configuration Guide

## Upgrading from an Earlier Version

If you already have a version of Operations II installed, use the upgrade procedure described here to update the application.

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**Important:** Before updating or upgrading, we recommend you take a full backup of your existing installation. We also suggest you review the Readme file at the end of the upgrade process for details of any late-breaking news or information that may affect the upgrade procedure.

Before running the setup program, close as many applications as possible.

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### Upgrading the Server

1. Run the *Setup.exe* command from the installation files folder.
2. Follow the instructions on the screen. The program will automatically detect the existence of a server installation.
3. When the files have been copied, run Update Data Structures before using company databases.

### Upgrading the Client

1. Using Windows Explorer, open the folder in which you installed the server and then open the *Netsetup* folder. The folder must be shared before you can access it.
2. Double-click **Netsetup**.
3. Follow the instructions on the screen. The program will automatically detect the existence of a client installation.

### Running the Software

You may need to reactivate your software before you can use Operations II. If so the Activation form is displayed. Enter the details displayed on your licence details form. For more information, see the [Logging on & Activating the Software](#) section in this guide.

You must run Update Data Structures after logging in to Operations, regardless of whether you reactivate the software.

### To Update the Data Structures

1. Open the *System* folder and then open the *Utilities* subfolder.
2. Click **Update Data Structures**. A message appears reminding you that no other users must be on the system and that you must have a backup of your data files before you continue.
3. Click **Next**.
4. In the list box provided, click to select the company databases that are to be processed in the update.
5. Click **Next**.
6. Click **Start**. The data structures will be updated and progress is displayed on the screen.
7. When the process is complete, click **OK**.

# Installation and Configuration Guide

## Installing Operations II for the First Time

### Running the Server Setup

The installation of the server software is the same regardless of whether you are setting up a stand-alone system, with the server and client residing on the same computer, or setting up a networked system in which the server is physically separate from the client. Once you have followed the instructions below for your server, follow the steps for the client installation accordingly.

### To Setup the Server software

1. Run the *Setup.exe* command from the installation files folder.
2. Follow the instructions on the screen.

#### Server Setup Stage 1

The first part of the setup reminds you of the licence agreement. Click **Next** when you have read and accepted the terms of your licence agreement.

#### Server Setup Stage 2

The next stage prompts for the path (drive and folder name) in which the server application will be installed. Click **Next** when you have entered the path.

#### Server Setup Stage 3

The next stage confirms the details of the installation. Make sure you want to install the server version in the drive and folder location shown. If you want to change it, click the **Back** command button and change the details accordingly. Click **Next** when you are ready to install the application.

#### Server Setup Stage 4

The setup program will extract and install the files. When the server installation is complete for Operations II, you can install the Operations II client software and the Operations II PDF Printer.

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**Note:** If the PDF Printer is installed, the program will leave it permanently on the system and it will be available to all users in Operations II. If not installed, the PDF Printer is created whenever it is needed and removed it after it is used.

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#### Server Setup Stage 5

Continue with the installation of Operations II client software if you intend to carry out a stand alone installation or you are using your server as a workstation (see the next section *Running the Client Setup - Stand Alone Installations*).

Tick the **Do you want to view the Readme file?** box and click **Next** to see information about the release including any late-breaking news. Then close the Readme file and click **Finish**.

## Running the Client Setup - Stand Alone Installations

Follow these steps if you are installing the client on the same computer as the server. This assumes you have selected the **Do you want to install a Client?** box at the end of the server installation.

### Client Setup Stage 1

The first part of the setup reminds you of the installation licence. Click **Next** when you have read and accepted the terms of your licence agreement.

### Client Setup Stage 2

This stage prompts for the location into which you want to install the client application. The default is *C:\Program Files\Pegasus\Operations II* (32-bit Windows editions) or *C:\Program Files (x86)\Pegasus\Operations II* (64-bit Windows editions). If you want to install the client in a different location, click **Browse** and use the browse dialog to select an existing folder or create a new one. If you type a folder name that does not exist, you will be asked if you want to create it. If it does exist and contains files, you will be prompted to confirm whether you want to delete the files.

Click **Next** when you are ready to move to Stage 3.

### Client Setup Stage 3

Select the name of the program folder into which you want the application shortcuts located. The default is **Pegasus Operations II**, but you can choose any name you like, including the name of an existing folder.

Click **Next** when you are ready to move to Stage 4.

### Client Setup Stage 4

This stage confirms the details of the installation. Make sure you want to install the client version in the drive and folder location shown. If you want to change it, click the **Back** command button and change the details accordingly.

Click **Next** when you are comfortable with the details. The setup program will extract and install the necessary client files and prompt you when the installation is complete.

### Client Setup Stage 5

Tick the **Do you want to view the Readme file?** box and click **Next** to see information about the release including any late-breaking news. Then close the Readme file and click **Finish**.

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**Note:** If the setup program detects that your computer must be restarted, you can choose between restarting your computer now, or quitting the setup and restarting the computer later. In any case, if this dialog box does appear, you *must* restart the computer before you use Operations II.

If the setup program determines that you do not have to restart your computer before you can use the programs, you can choose whether to start Operations II now.

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## Running the Client Setup - Networked Installations

Only follow these steps if you are installing the client on a different computer to the server. You must follow these instructions for each client you want to set up that will have access to the server.

### Important Notes

- Before running the setup, close as many applications as possible. Also, review the Readme file. All other user documents are available from the Pegasus Info Centre. Please visit [www.pegasus.co.uk/pegasusinfocentre/](http://www.pegasus.co.uk/pegasusinfocentre/).
- The folder in which the server version is installed must be shared.
- There are two ways in which you can run the Netsetup.exe program from the client computer:
  - Map a drive letter from the client computer to the server. Then locate and run **Netsetup.exe** on the server from the client using Windows Explorer.
  - Find the server on the network using a UNC (Universal Naming Convention) path. Then locate and run **Netsetup.exe** on the server from the client.
- You will be given an option to install the executable program (*Operations.exe*) locally on the client computer or run from the server. For optimum performance, we strongly recommend you install the client locally.

### To Setup Client software

1. Use Windows Explorer to locate and open the folder in which you installed the server and then open the Netsetup folder.
2. Double-click **Netsetup.exe**.
3. Follow the instructions on the screen.

#### Client Setup Stage 1

The first part of the setup reminds you of the installation licence. Make sure you have read and accepted the terms of your licence agreement before you continue with the setup.

Click **Next** when you are ready to move to Stage 2.

#### Client Setup Stage 2

This stage only applies if you have chosen to run **Netsetup.exe** located on the server. You must have mapped a drive letter to the server before starting the client installation.

Click **Next** when you are ready to move to Stage 3.

#### Client Setup Stage 3

This stage prompts for the location into which you want to install the client application. The default is *C:\Program Files\Pegasus\Operations II (32-bit Windows editions)* or *C:\Program Files (x86)\Pegasus\Operations II (64-bit Windows editions)*. If you want to install the client application in a different location, click **Browse** and use the browse dialog to select an existing folder or type a new folder name.

If you type a folder name that does not exist, you will be asked if you want to create it. If it does exist and contains files, you will be prompted to confirm whether you want to delete the files.

Click **Next** when you are ready to move to Stage 4.

## Client Setup Stage 4

This stage prompts you to choose whether you want the executable program installed locally on the client computer or run from the server. We strongly recommend you install locally. This optimises performance to speed up the initial loading of the program.

Click **Next** when you are ready to move to Stage 5.

## Client Setup Stage 5

In this stage you can then select the name of the program folder into which you want the application shortcuts located. The default is **Pegasus Operations II**, but you can choose any name you like, including the name of an existing folder.

Click **Next** when you are ready to move to Stage 6.

## Client Setup Stage 6

This stage confirms the details of the installation. Make sure you want to install the client version in the drive and folder location shown. If you want to change it, click the **Back** command button and change the details accordingly.

When you accept the details by clicking **Next**, the setup program will extract and install the necessary client files and prompt you when the installation is complete.

A further message box is displayed if Adobe Reader is not present on the computer.

Click **Next** when you are ready to move to Stage 7.

## Client Setup Stage 7

Tick the **Do you want to view the Readme file?** box and click **Next** to see information about the release including any late-breaking news.

Tick the **Do you want to install the Operations II Printer?** box to install the PDF Printer for Operations II.

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**Note:** If the PDF Printer is installed, the program will leave it permanently on the system and it will be available to all users in Operations II. If not installed, the PDF Printer is created whenever it is needed and removed it after it is used.

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Then close the Readme file and click **Next** to continue.

If the setup program detects that your computer must be restarted, you can choose between restarting your computer now, or quitting the setup and restarting the computer later. In any case, if this dialog box does appear, you *must* restart the computer before you use Operations II.

If the setup program determines that you do not have to restart your computer before you can use the programs, you can choose whether to start Operations II now.

Click **Finish** to finish the installation.

# Installation and Configuration Guide

## Logging on & Activating the Software

On loading Pegasus Operations II for the first time, the **Activation** form will appear. You will have been given the necessary information to activate your system. The information must be entered exactly as shown on the activation slip, provided with your system. You will be prompted to enter the following security details:

- Licence Number.
- Serial Number.
- Activation Key
- Date Purchased.
- Company Name.
- Post Code.

It is also important that your company name, post code and date purchased are entered correctly, otherwise the activation will not work. Provided you enter the above details accurately; you will gain access to the software. If you fail to enter the above security details accurately, you will be denied access to the software. In case of difficulty, consult your Reseller.

If an activation key of DEMO is entered, you will have a demonstration system that you can use to familiarize yourself with the software. This system is restricted to the use of just one company database (with the identifier of Z) which is recreated every time you start the software until such time as a valid activation is entered.

You can also enter an activation key of EVAL. This also provides one demonstration company database, but the database is only created once and can be used as often as required until the data limit is reached. If you reach the limit of records that can be created, you can start again by copying the files from the **DemoData** folder to the **data** folder.

### To Activate Operations II

1. Click **Start**.
2. In the Programs group, point to Pegasus Operations II and then click **Pegasus Operations II**.
3. Enter the form details using the information from your registration card.
4. Once all the details have been entered, click **Activate**. The Operations II Logon dialog box appears.
5. In the User I.D. box, type **MANAGER**.
6. In the Password box, type **ABC**.
7. Click **Logon**.
8. Run the **Update Data Structures** command in the System module to ensure that data files are compatible with the programs.

### To Update the Data Structures

1. Open the System folder, click **Utilities** and then click **Update Data Structures**.
2. Provided you have taken a backup of your data files and made sure no other user is logged on to Operations II, click **Next**.
3. In the list box, click to select the company or companies for which you want to update the data structures. Click **Next**.
4. If you want to run the update unattended, log on to the system using the ADMIN user ID so you can select the Run Unattended option and enter the name of the file that will store an audit of the process in the Audit File box. The default is UDSAudit.Txt.
5. Click **Next**. Then click **Start** to begin the update.

# Installation and Configuration Guide

## Creating New Company Databases

Operations II companies are created using the **Company Profiles** command in the System module.

To create a company profile, you will need to:

- Assign a code to the company using any letter from A to Z or a number from 0 to 9.
- Complete details of the company name. This will be included on all reports and documents produced for that company. It is a mandatory requirement.
- Identify the folder name in which the company's data files are located. The folders you specify must exist.

### To Create a New Company

1. Open the System folder, click **Maintenance** and then click **Company Profiles**.
2. On the toolbar menu, click the **Create a new record** button.
3. On the **Company Profiles** form, complete the boxes provided.

For further information about creating companies and completing company profile records, refer to the F1 Help.

# Installation and Configuration Guide

## Uninstalling Operations II

### To Remove the Server Software from your computer

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**Note:** These steps are carried out on the server machine

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1. Click **Start**, and then point to **Settings**.
2. Click **Control Panel**.
3. Double-click **Add/Remove Programs**.
4. On the **Install/Uninstall** tab, select Pegasus Operations II from the list.
5. Click **Add/Remove**.
6. Follow the instructions on the screen.

### To Remove the Client Software from your computer

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**Note:** These steps are carried out on each client machine

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1. Click **Start**, and then point to **Settings**.
2. Click **Control Panel**.
3. Double-click **Add/Remove Programs**.
4. On the **Install/Uninstall** tab, select Pegasus Operations II Client from the list.
5. Click **Add/Remove**.
6. Follow the instructions on the screen.

### Important Notes

- For server installations, the uninstall programs removes those files and registry entries that were created during the installation. Some components may be left on the computer. For example, if you have created data files or used the demonstration data, the Pegasus folder will remain.
- For client installations, the uninstall programs removes those files and registry entries that were created during the installation and are unique to the product, but not all the DLLs and OCXs that were installed.
- You can remove the remaining files and/or folder using Windows Explorer.
- If any of the Microsoft Core Components have been installed because the versions supplied with Operations II are later than those currently installed on the machine, they will remain on the machine after uninstalling.
- The uninstall may ask you if you want to remove shared components. If you are not sure whether to remove such components, reply 'No' to all.

# Installation and Configuration Guide

## Linking Opera 3 or Opera II to Operations II

If you need to link Operations II to either Opera 3 or Opera II, you need to update Operations II with the locations for the Opera data files, system files and data dictionary. If you have upgraded from Opera II to Opera 3, you also need to reset these locations for Opera 3.

### To Set Up Operations II to link to Opera 3 or Opera II

After installing Opera, you need to set these locations on the **System – Utilities - System Configuration** form in Operations II. The following table includes the relevant options under the **System Settings – Directories** node and the locations of the folders. The names in the table under the **Network Share** heading are the share names created when either Opera 3 or Opera II is installed in the default location.

Option	Product	Network Share
<i>Accounts Data Files Directory</i>	Opera 3	<Servername>\O3 Server VFP Dynamic\Data\
	Opera II	<Servername>\ Server VFP Dynamic \Data\
<i>Accounts System Files Directory</i>	Opera 3	<Servername>\O3 Server VFP Dynamic \System\
	Opera II	<Servername>\Server VFP Dynamic \System\
<i>Accounts Data Dictionary Directory</i>	Opera 3	<Servername>\O3 Server VFP Dynamic \Datadict\
	Opera II	<Servername>\Server VFP Dynamic \Datadict\

**Note:** If Opera is installed in a different location, the share name is either: *O3 Server VFP Static and Dynamic* (Opera 3) or *Server VFP Static and Dynamic* (Opera II).

### Importing Opera 3 or Opera II data into Operations II

After setting up the locations for the Opera files, you can import data from Opera into Operations II using the **Import Data** wizard. The wizard can import the customer, supplier and stock records into the Operations II data files. This option is used when you first setup the system and wish to automate the loading of data from your existing Opera system.

**Important:** Before importing, take a full backup of your existing Opera and Operations II installations.

### To Import Opera data to Operations II

1. Log in to Operations II.
2. Open the **System** folder, click **Utilities**, click **Toolbox** and then click **Import Data**. The **Import Wizard** appears. Follow the instructions on the screen.

### Important Notes

- The import will only take place if the relevant Operations II customer, supplier and stock data files are empty. A validation is performed to see that the Opera company exists, has the same company ID letter and contains no negative stock balances. You must also be the only user in the Operations II company being updated. After importing, we recommend you disable the **Add**, **Edit** and **Delete** commands in Opera.
- You can import customers, suppliers and optionally stock. Stock is imported on an opening balance basis. The import will also update the Warehouse and Product Type tables.
- Make sure the accounts path and default stock information is correct in Operations II using the **System Configuration** command on the **Utilities** submenu of the System module.

# Installation and Configuration Guide

## Protecting Your System and Data

Pegasus Software is committed to performing regular security reviews of our software. This involves using standard vulnerability identification tools where possible to scan for software vulnerabilities as well as undertaking regular internal code reviews. Although we can never guarantee that our software is free of vulnerabilities, any vulnerabilities found will be immediately addressed and fixed with the highest priority.

Pegasus Software provides general guidelines on how to install, secure and protect the installation of our software through our product documentation. However, we cannot guarantee the security of the surrounding hardware/environment infrastructure, which is the responsibility of the customer, including networks, firewalls, operating systems, and web server configurations.

Although we always do our best to ensure that our software protects the customer, their users and their data, the customer also has a responsibility to protect themselves. It is therefore the customer's responsibility not to access the software or services from a location that is not secure, would violate laws or would otherwise be inappropriate. Customers should also note that clicking on inappropriate links in emails or on websites or exposing data to the internet can all pose an element of risk, and may provide the opportunity for unauthorised third parties to circumvent security precautions and illegally gain access to the software, services and your data.

To help protect your business, we would strongly advise that users of the system keep their usernames, passwords, or any other credentials secured and for their sole use. The changing of passwords on a regular basis as determined by each company's policies and procedures should also be adhered to. Users should also be security aware and should be cautious of any unsolicited emails requesting information or links which could ultimately be a security threat to your system.

In addition, customers should adhere to strict backup regimes to mitigate against data loss through security breaches, hardware failure or other unforeseen circumstances.

# Installation and Configuration Guide

## Files, Folders and Programs

When installing Pegasus Operations II various files, folders and programs are distributed on the computer according to the installation options and configuration of your computer.

### Server Files

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 documentation.

#### Folders

Operations II	The main folder that contains all the Pegasus Operations II application files. A different folder name may be chosen at the time of installation. This folder contains the main runtime program Operations.exe, and various other files and folders including:
Bespoke	A folder containing files relevant to third-party development
Classes	A folder containing the Operations II class library program
Data	A folder containing the company database files.
Datadict	A folder containing the data dictionary used by the Operations II application
DemoData	A folder containing the demonstration data files (Company Z)
Framework	This folder contains files and additional folders concerning the application's framework
Frameworksupport	This folder contains files and additional folders concerning the application's framework
Netsetup	A folder containing the setup programs for Pegasus Operations II clients on a network
Reporter	This folder contains a Data folder containing files relevant to the Reporter module
Reports	A folder containing the report definitions
Bespoke Reports	A folder containing files relevant to third-party development
System	A folder containing various system files including company and licence information, menu definition, help, and so on
Temp	A folder containing temporary files created during certain processes

#### Programs

Operations.exe	The application program for Pegasus Operations II
Netsetup.exe	The setup program for client installations
Other Files	
Operations.chm	The HTML online help system for Pegasus Operations II



## Client Files

Unless you intend to run a 'stand alone' version of the software (that is, installing the server and client on the same computer), during installation of the Operations II client, you will be asked whether you want the Operations II executable program to be installed locally or run across the network from the server.

The number of files that are installed depend on the choice you make. If you install the executable locally, more files are installed. The default is *C:\Program Files\Pegasus\Operations II* (32-bit Windows editions) or *C:\Program Files (x86)\Pegasus\Operations II* (64-bit Windows editions).

The following files are installed on the client whether the Operations II executable is installed or not.

### Common Files

DelsL1.isu	The InstallShield Log File
Operations II icon.ico	The Operations II icon file
Pegrel.txt	The Operations II Release File
Operations.chm	The HTML online help system for Pegasus Operations II

These files are installed if the Operations II executable is installed on the client

### Folders

Operations II	The main folder that contains all the Pegasus Operations II application files. This folder contains the main runtime program <i>Operations.exe</i> , and various other files and folders including:
Classes	A folder containing the Operations II class library program
Framework	This folder contains files and additional folders concerning the application's framework
Frameworksupport	This folder contains files and additional folders concerning the application's framework
Temp	A folder containing temporary files created during certain processes.

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**Note:** For Windows 7 set the location for the **Temp** folder to a location under *the C:\Users\All Users* folder or create a new folder in the root folder (for example; *C:\Temp*) on the client computer. Then update the *Operations.ini* configuration file – in the server installation's folder - to point to the new location.

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### Programs

Operations.exe	The application program for Pegasus Operations II
Netsetup.exe	The setup program for client installations

### Other Files

Operations.chm	The HTML online help system for Pegasus Operations II
Readme.htm	'What's New' information for the release
Operations.ini	The Operations II configuration file

In addition, a number of DLLs and OCXs are needed to support the product. These are installed in the Windows System folder if they are not already installed.