



Opera II
**Installation &
Upgrade Guide**



Opera II
Installation Guide



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Installation Guide

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Installation Guide

Introduction

About this Guide

This Installation Guide provides information concerning the installation and initial configuration of Opera II. It includes guidance for migrating from Pegasus Opera for Windows to Opera II Enterprise and for upgrading from Opera II Enterprise to Opera II Enterprise SQL.

The guide assumes you are conversant with networking environments, and have prerequisite knowledge of the supported Microsoft Windows server and desktop editions.

It does not cover the configuration of a network environment, though guidance is provided where certain configuration options affect the installation and operation of Opera II.

Platform Specific Information

Opera II is available for both Visual FoxPro and SQL Server database platforms. This guide applies to both database platforms, however, there are certain elements that are only relevant to one or the other database, and as such the relevant sections or paragraphs are clearly identified with the following labels:

[SQL] - only relevant if you are running the application on an SQL Server database

[VFP] - only relevant if you are running the application on a Visual FoxPro database.

Sections that are not identified with these labels are relevant to both database types.

Information for specific Windows products is also detailed separately.

Pegasus Info Centre

The Pegasus Info Centre (www.pegasus.co.uk/pegasusinfocentre/) is your resource for PDF user guides and other important information.

The Info Centre includes this guide to help you implement Opera II:

Software Requirements Guide	This guide lists the editions of Microsoft Office, Microsoft SQL Server, Microsoft Windows Server, Microsoft Windows desktop, web browsers and Microsoft .NET supported for Opera II and Online Filing Manager.
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Opera Help

Opera Help provides details of all the functions available in the application.

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 "Opera II Install Guide" in the subject box.

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

Installation Guide

Opera II Deployment Options

Installation Fundamentals

The Opera II installation consists of two distinct parts: Server software and Client software. The installation CD contains all of the files necessary for both; however, only the server installation can be performed directly from the CD.

In order to install the Client software, the Server must have already been installed. This is because the Client installation program is run from the *Client Setup* subfolder on the server that is created during the Server installation.

The installation of the Client installs all the necessary files needed to run Opera II from the client computer.

Stand-Alone Installations

The stand-alone installation is the simplest deployment of Opera II. The Client and Server software are both installed on a single computer.

This type of installation suits single user sites, where only one user requires access to Opera II at any one time.

Client-Server Installations

In this type of installation, the Server software is installed on a different computer to that of the Client. Clients connect to the server across the Local Area Network (LAN).

This type of installation allows multiple Clients to access the same Server installation and therefore suits multi-user sites, where many users require access to Opera II at any one time.

[VFP] SPM Remote Installations

An SPM (Sales Pipeline Management) Remote installation is a stand-alone deployment of Opera II. The Client and Server software are both installed on a single laptop computer.

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Database Considerations

Opera II Enterprise uses a Microsoft Visual FoxPro database and Opera II Enterprise SQL uses a Microsoft SQL Server database. Pegasus Document Management, which is part of both Opera II Enterprise and Opera II Enterprise SQL, also uses a Microsoft SQL Server database.

[VFP] Microsoft Visual Foxpro

Opera II Enterprise uses a Microsoft Visual FoxPro database. The application is designed for stand-alone computers and for networked Client-Server environments. All of the necessary Visual FoxPro components are installed as part of the Opera II installation.

[SQL] Microsoft SQL Server

Opera II Enterprise SQL uses a Microsoft SQL Server database. The application is designed for a networked Client-Server environment. Microsoft SQL Server must be already installed and running on the network server computer before Opera II Enterprise SQL is installed.

Please see the System Requirements Guide for the list of supported Microsoft SQL Server databases.

Installation Guide

Windows User Account Control

Windows Server 2008 and Windows Vista introduced a feature called *User Account Control* (UAC) that lets you use your computer without elevated administrator privileges. This makes it more secure from malicious software when you are connected to the internet. Even if you are a user with administrator's privileges, most programs are still run with a standard user's security permissions and you are asked before any software is installed.

All Windows products released after Windows Server 2008 and Windows Vista, for example Windows Server 2012 and Windows 8, include this feature.

Before the Opera II installation program runs, a UAC message like *An unidentified program wants access to your computer* or *Do you want to allow the following program from an unknown publisher to make changes to this computer?* may be displayed. The UAC feature is checking that you want to install the software before it allows it to continue. Click either the **Allow** button or **Yes** button when the message is displayed.

To install or upgrade Opera II Enterprise and Opera II Enterprise SQL, you need Administrator's security permissions.

Installation Folders

These are the default locations for Opera II installations on these Windows products:

Bitness	Programs	Data
Windows 32 bit editions (x86)	c:\Program Files\Pegasus\...	c:\ProgramData\Pegasus\...
Windows 64 bit editions (x64)	c:\Program Files (x86)\Pegasus\...	c:\ProgramData\Pegasus\...

For more information about the Opera II folders in all supported Windows products, see [Appendix A](#) (page 25) and [Appendix B](#) (page 26).

Installation Guide

Document Management and Pegasus Dashboards Installations

Pegasus Document Management and Pegasus Dashboards are installed independently of Opera II. Both products are included on the Opera II CD and have separate installation programs and related installation guides. If you are installing and activating an Opera II system that includes Document Management or Pegasus Dashboards, you must install these products before running Opera II.

Important: You must follow the instructions in each installation guide when installing Document Management and Pegasus Dashboards.

Pegasus Document Management

Pegasus Document Management is an integrated Opera II module that provides secure document capture and retrieval functionality both in the Document Management module and throughout Opera II. Paper documents, and electronic files such as Word documents, Excel Spreadsheets or PDF files can be captured and securely archived.

Pegasus Document Management is installed separately from the Opera II installation. If you use the module, the latest version of the product must be installed from the Opera II CD to benefit from the latest features.

If the product is not installed, the message 'Document Management is not currently available' is displayed when you select any of the Document Management menus in Opera II.

You will not be able to open any of the Document Management forms until the product is installed.

Pegasus Dashboards

Pegasus Dashboards provides a flexible way of displaying your Opera II Enterprise or Opera II Enterprise SQL data in a graphical format in Microsoft Internet Explorer. The product uses special views to display your Opera II data that are created by the Update Data Structures (UDS) command in Opera II if Pegasus Dashboards is installed.

If you use Pegasus Dashboards, the latest version of the product must be installed from the Opera II CD before the UDS command is run.

Note: Installation instructions and details of essential prerequisites are included in the product's Installation Guide in the 'Pegasus Dashboards' folder on the Opera II CD.

[VFP] Dashboards Manager

The Dashboards Manager module allows you to create your own custom-designed dashboards and charts to display data for all Opera II Enterprise modules according to your requirements. Any bespoke modifications to your Opera II solution can also be included in your custom charts if necessary. Custom charts are displayed alongside the standard charts in Pegasus Dashboards.

Dashboards Manager is installed at the same time as the Opera II installation.

Installation Guide

Installing Opera II for the First Time

Introduction

To install software, you must log on to the computer using a User Name that is a member of the Administrators' group.

Before running the installation, we recommend you close as many applications as possible and read the Release Guide and Readme file.

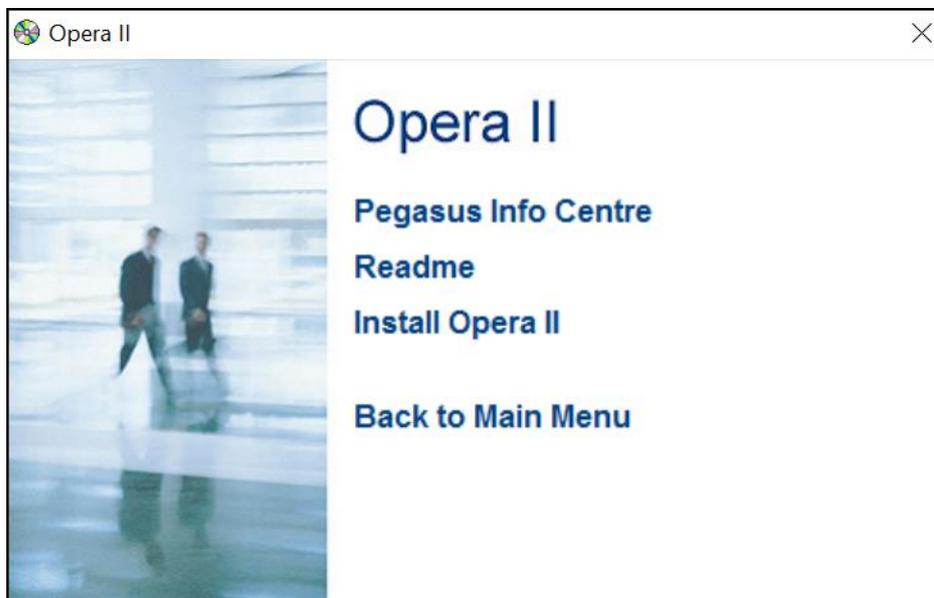
The installation of the server software is the same regardless of whether you are carrying out a stand-alone installation or client-server installation.

Note: If you intend to either use the software for demonstration or evaluation purposes using the EVAL or DEMO activations, you should install a stand-alone installation.

Installing Server Software

Important: As the installation updates the computer's registry as well as installing the necessary files and folders, the Opera II Server installation must be done at the file server computer. It must not be installed from another computer.

From the Installation Setup menu, click **Opera II** and then click **Install Opera II**. Then follow the instructions on the screen. If a User Account Control (UAC) message is displayed, click either the **Allow** button or **Yes** button to continue. See page 8 for details.



Opera II Installation Setup menu

Note: The Installation Setup menu should be displayed when you insert the Opera II CD into the CD drive. If it is not, double-click **Menu.exe** in the main folder on the Opera II CD to display the menu.

At any stage of the wizard (up until the installation itself), you can click **Back** to review or change any of the settings.

Stage 1 - Welcome

The first dialog welcomes you to the product. Please read the contents of the Welcome screen, and then continue with the setup by clicking **Next**.

Stage 2 - Destination Folder

You are prompted for the path (drive and folder name) into which the Server software is to be installed. The default is `c:\Program Files\Pegasus\Server XXX\` (32 bit Windows products) or `C:\Program Files (x86)\Pegasus\Server XXX` (64 bit Windows products) where *XXX* is either *VFP* or *SQL*. If you want to replace this with a path of your choice, click **Change**. Navigate to the appropriate folder by clicking the **Look In** box. If required, click the new folder button and enter a new folder name.

Click **OK** and then click **Next**.

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 - Installation

The installation program extracts and installs the files from the CD.

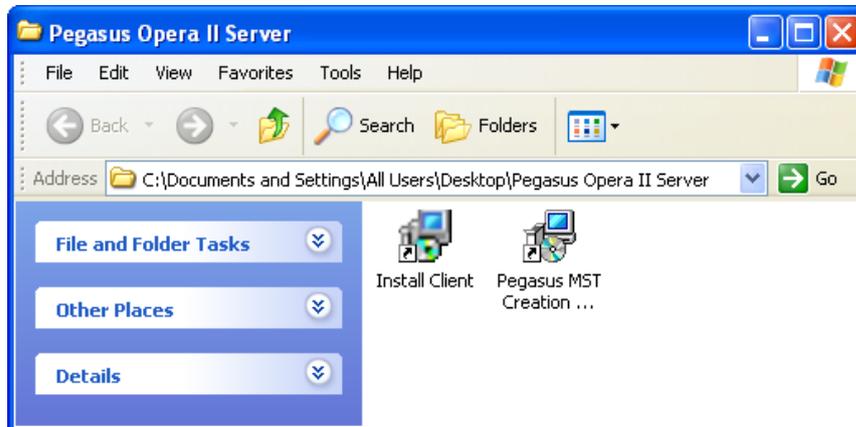
Stage 5 - Server Installation Completed

Click **Finish** to exit the Installation Wizard.

Installing Client Software for Stand-Alone Installations

In order to install the client software, the server software must already be installed and accessible. Follow these steps if you are installing the client software on the same computer as the server software.

On the Windows desktop, locate the folder named *Pegasus Opera II Server* and open it. Then double click the **Install Client** icon. If a User Account Control (UAC) message is displayed, click either the **Allow** button or **Yes** button to continue. See page 8 for details.



Opera II Client installation shortcut

The Installation 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.

Stage 1 - Welcome

The first dialog welcomes you to the product. Continue with the setup by clicking **Next**.

Stage 2 - Destination Folder

You are prompted for the path (drive and folder name) into which the client software is to be installed. The default is `c:\Program Files\Pegasus\Client XXX\` (32 bit Windows products) or `C:\Program Files (x86)\Pegasus\Client XXX` (64 bit Windows products) where *XXX* is either *VFP* or *SQL*. If you want to replace this with a path of your choice, click **Change**. Navigate to the appropriate folder by clicking the **Look In** box. If required, click the new folder button and enter a new folder name.

Click **OK** and then click **Next**.

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 - Installation

The installation program extracts and installs the files from the 'Client Setup' folder on the Server.

Stage 5 - Client Installation Completed

If the computer must be restarted before you can use Opera II, a dialog is displayed giving the option of restarting your computer now, or quitting the installation and restarting the computer later. If this dialog is displayed, select to restart later if you need to install the Microsoft SOAP (Simple Object Access Protocol) Toolkit (Stage 6).

Click **Finish** to close the wizard.

Installing Client Software for Client-Server Installations

Follow these steps if you are installing the client software on a different computer to the server.

The client installation must take place on every computer on which you want to use the Opera II client. You must install the client software before running Opera II. In order to install the client on a different computer to the server, the server must already be installed, and the folder in which Opera II is installed on the server must be shared or accessible via a network drive letter.

Sharing the Server Folders

The Server software installation creates all the appropriate network shares as described in the [Network Shares](#) section in [Appendix C](#) on page 27. However, if the folders are not shared, you must manually share them by carrying out the following steps (these are the default locations for the server installation):

1. On the server computer, open Windows Explorer and navigate to either:

C:\Program Files\Pegasus\... (32 bit Windows)

C:\Program Files(x86)\Pegasus\... (64 bit Windows)

2. Right click on the *Server XXX* folder, where XXX is either *VFP* or *SQL*, and select **Properties**.
3. Click the **Sharing** tab and then click the **Advanced Sharing** button.
4. In the **Share Name** field, enter the share name as appropriate for your database. For example, enter either *Server VFP Static* or *Server SQL Static* for the *Server XXX Static* share.
5. Complete any security options as required, and click **OK**.

Note: Repeat steps 1 to 5 for each of the shares listed in [Appendix C](#) on page 27. You must use the share names described under the UNC Share Name heading.

Installing the Client Software on Client Computers

1. On the client computer, use either Windows Explorer or Start - Run to navigate to the \\<Server>\Server XXX Static\Client Setup\ folder, where <Server> is the Opera II server's name, and XXX is either VFP or SQL. If the server software was installed in a non-default location, navigate to the \\<Server>\Server XXX Static and Dynamic\Client Setup\ folder.
2. Open the *Exe* subfolder.
3. Double-click **Setup.exe** to run the client installation. If a [User Account Control \(UAC\)](#) message is displayed, click either the **Allow** button or **Yes** button to continue. See page 8 for details.

The Installation 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.

4. Repeat steps 1 to 3 for each client computer.

Stage 1 - Welcome

The first dialog welcomes you to the product. Please read the contents of the Welcome screen, and then continue with the setup by clicking **Next**.

Stage 2 - Destination Folder

You are prompted for the path (drive and folder name) into which the client software is to be installed. The default is `c:\Program Files\Pegasus\Client XXX\ (32 bit Windows)` or `C:\Program Files (x86)\Pegasus\Client XXX\ (64 bit Windows)` where *XXX* is either *VFP* or *SQL*.

If you want to replace this with a path of your choice, click **Change**. Navigate to the appropriate folder by clicking the **Look In** box. If required, click the new folder button and enter a new folder name.

Click **OK** and then click **Next**.

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 - Installation

The installation program extracts and installs the files from the *Client Setup* folder on the server.

Stage 5 - Client Installation Completed

If the computer must be restarted before you can use Opera II, a dialog is displayed giving the option of restarting your computer now, or quitting the installation and restarting the computer later. If this dialog is displayed, select to restart later if you need to install the Microsoft SOAP (Simple Object Access Protocol) Toolkit (Stage 6).

Click **Finish** to close the wizard.

Installing Client Software using Windows Group Policy

Microsoft Windows Group Policy allows you to simplify and automate software installations. You can install Opera II Client installations using Windows Group Policy and Group Policy Objects (GPOs) in an Active Directory environment.

To install the Opera II Client using Windows Group Policy, the GPO must include a Windows Installer (.msi) package. The Opera II Server installation includes an msi file called *Pegasus Opera II Client.msi*, located in the *Client Setup* folder.

For more information on Windows Group Policy, and how to create GPOs and Windows Installer packages in an Active Directory environment, refer to the [Microsoft Web Site](#).

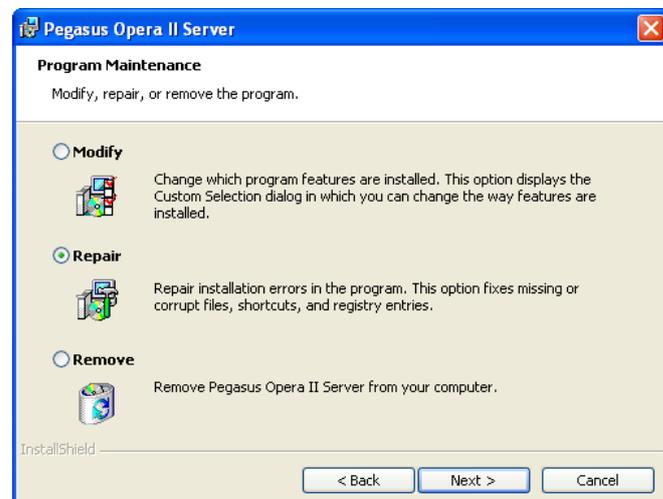
Security Permissions for Client Installations

After the Opera II client is installed, you must ensure that everyone using Opera II on the client computer has the necessary security permissions for the *Static Client* folder. To allocate the necessary permissions, do the following:

1. On the client computer, navigate to the Opera II client installation's folder. The default is `c:\Program Files\Pegasus\Client XXX\ (32 bit Windows)` or `C:\Program Files (x86)\Pegasus\Client XXX\ (64 bit Windows)` where *XXX* is either *VFP* or *SQL*.
2. Using the right mouse button (right-click), select the Client installation's folder.
3. Select the **Properties** menu item.
4. On the Properties form:
 - i. Click the **Security** tab.
 - ii. Select the Users user name (for example, Users(JOHN-SMITH\Users))
 - iii. Select the **Full Control** box in the **Allow** column.
5. Click **OK**.

Repairing Server and Client Installations

You can use the **Repair** option to repair some problems with the Opera II server or Opera II client installations. The option is accessed via the Control Panel by clicking either the **Change** or **Repair** button. The button that is displayed depends on the Microsoft Windows product.



Repair Opera II installation option on the Program Maintenance form

However, it may be necessary to uninstall and then reinstall the software. See the [Uninstalling Opera II](#) chapter for instructions on how to remove the server and Client software.

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Upgrading from Earlier Versions of Opera II

This section describes how to upgrade from earlier versions of Opera II.

Before Running the Upgrade

- Take a full backup of the Opera II installation, including system, data, reports, etc. The default installation folder for these on your Opera II server depends on the Windows product on the computer. For information about the Opera II folders in all supported Windows products, see [Appendix A](#) (page 25) and [Appendix B](#) (page 26).
- If your Opera II installation includes bespoke software, make sure that the software has been tested to ensure it works with this release of Opera II. This must be done before this release of Opera II is installed on a live system.
- If the *SPM Remote Feature* of Sales Pipeline Management is used, ensure all remote users have run the **Upload Data & End Remote Session** command.
- Read the Readme file.
- Ensure no one is logged in to the system that is to be upgraded.

Upgrading Opera II Server Installations

Important: The Opera II Server installation updates the computer's registry as well as installing the necessary files and folders onto the hard disk. It must be installed at the file server computer and not from another computer.

From the Installation Setup menu, click **Opera II** and then click **Install Opera II**. Then follow the instructions on the screen. If a [User Account Control](#) (UAC) message is displayed, click either the **Allow** button or **Yes** button to continue. See page 8 for details.



Opera II Installation Setup menu

Note:

The Installation Setup menu should be displayed when you insert the Opera II CD into the CD drive. If it is not, double-click **Menu.exe** in the main folder on the Opera II CD to display the menu.

Stage 1 - Welcome

Please read the contents of the Welcome screen, and then continue with the setup by clicking **Next**. Click **Cancel** if you do not want to upgrade.

Stage 2 - Upgrading the Opera II Server Installation

The upgrade installation program extracts and upgrades the files from the CD or shared network drive. This will take a few minutes to complete.

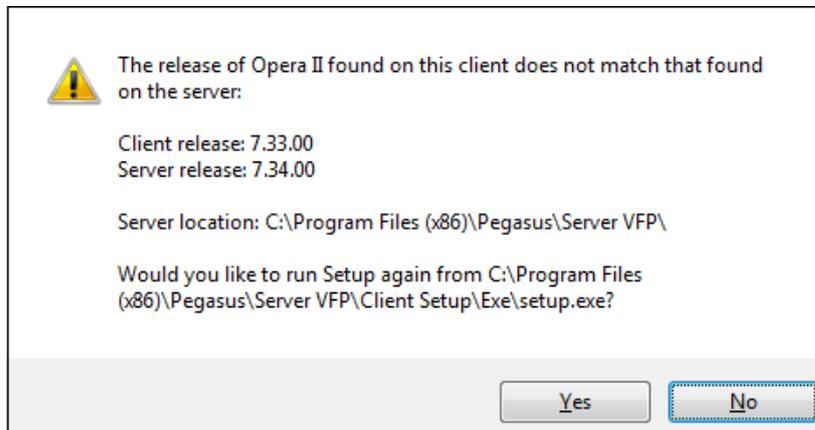
Stage 3 - Server Upgrade Completed

The Opera II Server software has been upgraded. Click **Finish** to exit the Installation Wizard. You may need to restart the server computer before installing the Opera II client installations. A message is displayed if you need to do this.

Upgrading Opera II Client Installations

If you are not using Microsoft Windows Group Policy, you must repeat this procedure on each Client computer.

The easiest way to upgrade the client installation is to run Opera as normal after the server software has been upgraded. This message will be displayed if the server software version is different to the client software version.



Opera II client upgrade message

Select **Yes** to install the client software.

The other way to upgrade the client installation is to use either Windows Explorer or Start > Run to navigate to the location of your installation, open the **Exe** subfolder and run **Setup.exe**.

Default share	\\<Server>\Server XXX Static\Client Setup\
Non-default share	\\<Server>\Server XXX Static and Dynamic\Client Setup\ folder.

where <Server> is the Opera II server name, and XXX is either *VFP* or *SQL* as appropriate for your database.

Running Updating Data Structures

Before using Opera II to perform your normal day-to-day tasks, you must log on and run Update Data Structures (UDS) for all of the company data sets. In the unlikely event that the UDS process does not complete successfully, restore your company data from your pre-upgrade backup and run UDS again.

For further information, see the [Activating the Software and Logging On](#), and [Updating Data Structures](#) sections.

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Upgrading Client Software using Windows Group Policy

Microsoft Windows Group Policy allows you to automate software installations. You can upgrade Opera II Client installations using Windows Group Policy and Group Policy Objects (GPOs) in an Active Directory environment.

To upgrade Opera II Client installations using Windows Group Policy you need to create a new Windows Installer (.msi) package for the version of Opera II you are upgrading to. In the package, you must use the *Pegasus Opera II Client.msi* file to install the Opera II Client. This msi file is included with the Opera II Server installation in the *Client Setup* folder. Use the file from the *Exe* subfolder to create the Windows Installer package.

For more information on Windows Group Policy, and how to create GPOs and Windows Installer packages in an Active Directory environment, refer to the [Microsoft Web Site](#).

Important: If you previously installed Opera II using Windows Group Policy, you must first remove the Windows Installer package for the previous version of the Opera II Client installation before creating the new package for the latest version.

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Migrating Data from Opera to Opera II Enterprise

By running the Upgrade Wizard and Update Data Structures commands, it is possible to migrate data from Opera for Windows to Opera II. The Upgrade Wizard migrates data from one system to another and the Update Data Structures command upgrades files to reflect the way data is stored in Opera II.

Notes:

1. Seek guidance from your Pegasus Partner prior to migrating data from Opera to Opera II. Any reports customised by your Pegasus Partner are not upgraded from Opera to Opera II.
 2. You cannot migrate data for a company with the same identifier as one you have already created in your new installation. For example, if you have set up company A in your new installation, the Upgrade Wizard does not give the option to migrate data for company A from your old system.
-

Stage 1 - Prerequisites

1. Take a full backup of the Opera installation from which you intend to migrate.
2. Read the Release Guide and Readme file for release details plus any late-breaking news.
3. Ensure no one is logged in to the system from which data is to be migrated.

Stage 2 - Migration

The following steps assume you have already completed your new Opera II installation.

1. Log in to your new Opera II installation using the ADMIN user.
2. Open the System folder, click **Maintenance** and then click **Company Profiles**.
3. Click **Action** and then click **Upgrade Wizard**.
4. A Welcome dialog confirms the use of the Upgrade Wizard and advises that Update Data Structures must be run after data has been successfully migrated. Click **Next**.
5. The Warning dialog advises that a full backup of the data and system files should have been taken. Ensure a backup has been taken and click **Next**.
6. Use the next dialog to enter, or browse for, the path to the Opera `System` folder. Click **Next**.
7. Within the next dialog you must specify which company or companies you want to migrate. Select the required company, or companies, and click **Next**.
8. The next dialog displays the default folders for the data being migrated and gives the option for the original data to be removed once the migration is complete. If more than one company's data is being migrated, the drop-down list at the top of the dialog allows you to select each company and display its settings. If required, amend the default folders by browsing for the required locations, and specify if data should be removed when migrated. Click **Next**.
9. On the next dialog, click **Start** to commence the data migration.
10. Completion of data migration is confirmed by the display of the Finished dialog. Click **Close** to close the Upgrade Wizard.
11. After using the Upgrade Wizard, you must run the Update Data Structures command in Opera II for each of the companies you have upgraded.

Stage 3 - Updating Data Structures

After migrating data, you must run the Update Data Structures (UDS) Wizard. For further information, see the [Updating Data Structures](#) section in this guide.

Stage 4 - Implementation Guide

Follow the steps for each module in the [Implementation Guide](#) to set up the modules in Opera II before they are used.

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Migrating Data from Opera II Enterprise to Opera II Enterprise SQL

Follow the instructions in this section if you currently use Opera II Enterprise and want to migrate your data from Visual Foxpro to Microsoft SQL Server. A wizard is provided in Opera II for this purpose.

Notes:

1. Seek guidance from your Pegasus Partner prior to migrating your data.
 2. You cannot migrate data for a company with the same identifier as one already in your new installation. For example, if you have already set up company 'A' in Opera II Enterprise SQL, the wizard does not give the option to migrate data for company A from your old system.
-

Stage 1 - Prerequisites

Before migrating the data, you should:

1. Install Opera II Enterprise SQL and have an available Microsoft SQL Server installation.
2. Read the Opera II Enterprise SQL Readme file for details of any late-breaking news.
3. Take a full backup of your Opera II Enterprise installation from which you intend to migrate. Run the various 'housekeeping' commands to optimise your existing data. This reduces the time needed to migrate the data to a Microsoft SQL Server database. Consider commands like:
 - i. Period Ends (Sales, Purchase, Nominal and Stock modules)
 - ii. Reorganise procedures (Cashbook, POP and SOP modules)
 - iii. Tidy Sales and Purchase History (Sales and Purchase modules)
 - iv. Tidy VAT Files and commit to VAT (System module)
4. Ensure no one is logged in to your existing Opera II Enterprise installation.

Stage 2 - Migration

1. Log in to your new Opera II Enterprise SQL installation using the ADMIN user.
2. When prompted, enter the location of your Microsoft SQL Server installation. Accept the Demonstration Data's suggested name for its database and click **OK**.
3. In Opera II Enterprise SQL, select the System - Maintenance - Company Profiles command, click **Action** and then click **Upgrade Wizard**.
4. A Welcome dialog is displayed. Read the text and then click **Next** to continue.
5. The Warning dialog is displayed. Read the text and then click **Next** to continue.
6. A dialog is displayed for you to enter or browse to the location of your Opera II Enterprise installation's *System* folder. Then click **Next** to continue.
7. A dialog is displayed for you to select the data you want to migrate. Tick the required companies, and then click **Next** to continue.
8. The next dialog displays data locations for the selected companies and gives you the option to remove the original data after the migration. A drop-down list allows you to view and change the settings for each selected company. If required, amend the location of the Opera II Enterprise data (*Old Opera data*), the future location of certain data baggage files (*New Opera data*), and the location of your MS SQL Server computer (*SQL Server*). Then specify whether to remove the data after the upgrade, click **Next** and then click **Start** to commence the data upgrade.

Stage 3 - Updating Data Structures

After migrating your data, you must update your data in Opera II Enterprise SQL using the System - Utilities - Update Data Structures command. For further information, see the [Updating Data Structures](#) section of this guide.

Installation Guide

Activating the Software and Logging On

Updating the Activation form

When launching the software for the first time, the Activation form is displayed. At this point you can choose to activate your software with the unique activation details for your installation or use a demonstration database in order to familiarize yourself with the software.

Demonstration Activations

There is a choice of two activation keys for the demonstration database:

- DEMO provides access to a single company database, with the identifier of Z, which is recreated every time you start the software, until your unique activation details are entered.
- EVAL provides access to a single company database, with the identifier of Z, which 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 use a demonstration database, enter either DEMO or EVAL in the Activation Key field of the Activation form. Then click **OK**. The Module Selection dialog is displayed. Select the required modules and click **OK**.

For further information about using the demonstration database or implementing a new system, refer to the Demonstration Data Guide or the Implementation Guide.

[SQL] If you are using demonstration data with Opera II on the SQL Server database, a dialog is displayed for specifying the location of the demonstration data. Select or overtype the SQL Server and Database names as required and click **OK**.

Customer Activations

To activate your software with the unique activation details for your installation, enter the activation details supplied with your software exactly as shown, including the correct letter case.

You must enter:

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

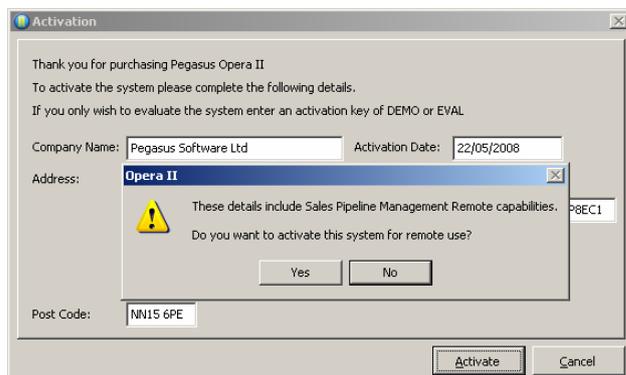
If you fail to enter the above security details accurately, you are denied access to the software. In case of difficulty, consult your Pegasus Partner.

Important: If you are installing and activating an Opera II system that includes Document Management or Pegasus Dashboards, you must install these products before using Opera II. See the **Document Management and Pegasus Dashboards Installations** section for details.

[VFP] Activating SPM Remote Back-Office & Laptops

If the licence details include SPM Remote capabilities, the activation process includes a message that you need to respond to.

The message is displayed after the **Activate** button is selected.



Select **Yes** if the computer will be used as an SPM Remote laptop

Select **No** if the computer is part of the Opera II back-office system (the file server or computers permanently linked to the file server).

Activation form message

After Activating the Software

Once you have activated the software, the Login dialog is displayed. Two default user records, MANAGER and ADMIN (both without passwords), are provided when the software is installed.

In addition to all standard functions, the MANAGER user has access to User Profiles and Company Profiles in order to control user passwords, and the companies, menus and commands to which other users have access.

The ADMIN user has the same access rights as the MANAGER user, with additional abilities such as running Update Data Structures unattended, automatically rebuilding indexes during Update Data Structures, amending report layouts, and upgrading from Pegasus Opera and Pegasus Capital Gold.

Tip: For security reasons, passwords for both of these user records should be created using the User Profiles function once you have completed the logon procedure.

Enter a User I.D. of either MANAGER or ADMIN, leave the password field blank, and click Logon to access the software.

Installation Guide

Updating Data Structures

The Update Data Structures Wizard checks the integrity of the data files and ensures that the system database and all company databases reflect the latest data structures defined in the data dictionary. It must be used after migrating data from Opera for Windows or Opera II on a different database, and after upgrading from a previous version of Opera II with the same database type.

1. If not already logged on, log on to your new Opera II installation as the ADMIN user.
2. Open the System folder, click **Maintenance** and then click **User Profiles**.
3. In the **Allow Access to Company Codes** box, click to select all companies you want to include in the update and data validation process. You can only run the Update Data Structures command on companies to which you have access rights.
4. Click **Save current changes** on the toolbar and then click **Close**.
5. Log off and log on to your new Opera II installation as the ADMIN user to activate the change in access to company codes.
6. Ensure no one else is logged on to your new Opera II installation.
7. Open the **System** folder, click **Utilities** and then click **Update Data Structures** to launch the Update Data Structures Wizard.
8. The first dialog confirms the use of the Update Data Structures Wizard and advises that a full backup of the data files should have been taken and no one else should be logged on to the system. Ensure a backup has been taken and no one else is logged on, and then click **Next**.
9. Within the next dialog you must specify which company or companies you want to update. Select the required company, or companies, and click **Next** to continue.
10. If you logged on as ADMIN, the next dialog allows you to specify if you want to force rebuilding of all indexes and tables, and/or run the update unattended.
 - **Force rebuilding of indexes and tables**
Forcing the rebuilding of indexes and tables defragments data, and ensures efficient data retrieval.
 - **Run unattended**
Before data is updated, it is checked to determine if it needs to be audited. An audit is usually required on data updated from Opera (16-bit) or when a new release of Opera II is installed. The audit ensures that existing data conforms to the business rules defined in the data dictionary. When run attended, the audit operates interactively; a data validation tool presents details of any data anomalies on-screen and you can change values to reflect valid entries. If you choose the Run unattended option, the process runs without any operator intervention and details of any data anomalies are written to an audit file. The name and location of the audit file can be amended by overtyping or browsing for a new location.

Click **Next** to continue.

11. On the next dialog, click **Start** to commence the update. A task list and status bars show progress. If an attended update is being run, a series of messages and any data anomalies are displayed for you to deal with as appropriate. If problems are detected that cannot be fixed in this way, the update process is halted. Such problems may have to be fixed using Visual Foxpro.
12. Completion of update is confirmed by the display of the Finished dialog. If an unattended update is being run, this dialog includes a **View Audit File** command button that can be used to access the audit file in order to resolve any anomalies highlighted. Click **Close** to close the Update Data Structures Wizard.

Important: In the unlikely event that the Update Data Structures process does not complete successfully for all selected companies, restore all the company data from the pre-upgrade backup and try again.

Installation Guide

Uninstalling Opera II

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.

Important: To remove Opera II Clients that were installed using Windows Group Policy, you must remove the Group Policy Object (GPO) for the Opera II Client installation in the Microsoft Windows Group Policy software and select the "Immediately Un-Install the software from Users and Computers" option.

The uninstall program may ask you if you want to remove shared components. If you are not sure whether to remove such components, reply 'No to All'.

Removing Opera II Client and Server Software

1. Open the Windows Control Panel.
2. Click either **Uninstall a Program** or **Add or Remove Programs** (depending on the Windows edition used).
3. Select **Pegasus Opera II Client** from the list.
4. Click either **Uninstall** or **Change/Remove** (depending on the Windows edition used).
5. Follow the on-screen instructions.
6. Select **Pegasus Opera II Server** from the list, then either click **Uninstall** or **Change/Remove**, depending on the Windows product.

Note: A message like *An unidentified program wants access to your computer* or *Do you want to allow the following program from an unknown publisher to make changes to this computer?* may be displayed before you remove the software. Click either the **Allow** button or **Yes** button to continue.

Files and folders not removed

For Server installations, the uninstall process removes the files and registry entries 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 is not removed. For Client installations, the uninstall process 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 any remaining files and folders using Windows Explorer.

If any of the Microsoft Core Components were installed because the programs supplied with Opera II were later than those already on the computer, they will remain on the computer after the un-installation is complete.

Installation Guide

Appendix A – Server Folders

Where 'XXX' is mentioned, it refers to either VFP or SQL as appropriate for your installation.

Folders for Static Data (Read)

Windows 32 bit editions c:\Program Files\Pegasus\Server XXX
Windows 64 bit editions c:\Program Files (x86)\Pegasus\Server XXX

The following subfolders are under this location:

Folder	Purpose
Client Setup	Contains the files necessary to install the Opera II client
FrameworkSupport	Contains files and additional folders concerning the application's framework for bespoke software development
Group Policy	Contains the files and settings concerning the automatic deployment of Client software

Folders for Dynamic Data (Read/Write)

Windows (32 bit & 64 bit editions) c:\ProgramData\Pegasus\Server XXX

The following subfolders are under the Dynamic Data location:

Important: The names and structure of these folders are important. They must not be renamed or amended in any way. New folders must not be created in this location using Windows Explorer.

Folder	Contains
Backup	Backup files when they are generated using the Backup function in Opera II.
Bespoke	Files relevant to third-party development
Data	Company database files
DataDict	Data dictionary used by the Opera II application
DataDictCore	A version of the data structures as they are at the time of installation. Needed for bespoke software development and Update Data Structures
DemoData	Demonstration data files (Company Z)
FrameworkSupport	Files and folders concerning the framework
Reporter	Data folder containing files relevant to the Reporter module
Reports	Report definitions
System	Various system files including company and licence information, and menu definitions

Installation Guide

Appendix B – Client Folders

Where 'XXX' is mentioned, it refers to either VFP or SQL as appropriate for your installation.

Folders for Program 'Static' Data (Read)

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

Windows 32 bit editions	C:\Program Files\Pegasus\Client XXX
Windows 64 bit editions	C:\Program Files (x86)\Pegasus\Client XXX

The following subfolders are under this location:

Folder	Contains
Auxiliary	Program needed for the Sales Pipeline Management, Service Management, and Helpdesk modules
Classes	Files relevant for bespoke software development
Framework & Framework Support	Files and additional folders concerning the application's framework
PrinterInst	Programs and other files needed to create PDF reports in the application
User Documents	Demonstration Data Guide, Implementation Guide, Installation Guide, and Release Guide

Folders for 'Dynamic' Data (Read/Write)

Windows (32 bit & 64 bit editions)	C:\ProgramData\Pegasus\Server XXX
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This subfolder is under this location:

Folder	Contains
Temp	Various temporary files created during certain processes

Installation Guide

Appendix C – Network Shares for Client and Server Installations

The following table shows the network shares created during the Server installation and the Client executable installation on the server computer (where XXX is either VFP or SQL).

Where 'XXX' is mentioned, it refers to either VFP or SQL as appropriate for your installation.

32 bit Windows editions

UNC Share Name	Folder
Server XXX Static	C:\Program Files\Pegasus\Server XXX
Server XXX Dynamic	C:\ProgramData\Pegasus\Server XXX
Server XXX Static and Dynamic	If you selected an alternative location selected for the Server installation, this share includes the folders for both static and dynamic data.
Client XXX Static	C:\Program Files\Pegasus\Client XXX

64 bit Windows editions

UNC Share Name	Folder
Server XXX Static	C:\Program Files (x86)\Pegasus\Server XXX
Server XXX Dynamic	C:\ProgramData\Pegasus\Server XXX
Server XXX Static and Dynamic	If you selected an alternative location selected for the Server installation, this share includes the folders for both static and dynamic data.
Client XXX Static	C:\Program Files (x86)\Pegasus\Client XXX

Note: The folders listed in the above table assume the default folder locations have been selected during the installation.

Share Permissions for Client and Server Installations

Everyone using Opera II must have full permissions for both the Client and Server folders. The installation of the Opera II Client and Opera II Server sets each folder's share permissions to Full Control, Change, and Read. The installation then assigns the permissions to a group called 'Everyone'. This Windows group affects everyone using the server and client computers.

If you do not want everyone using either the server or client computers to have full access to these folders you should create a new group that includes only those people who need access to the folders, give the group full permissions, then lastly remove the 'Everyone' group. For example, you could create a group called Pegasus Users and assign full rights just to this group.

Installation Guide

Appendix D – Programs and Other Important Files

File Names

Program / File	Purpose
Menu.exe	The 'one-stop shop' installation menu program on the Opera II CD that allows you to run the install programs for Opera II, Online Filing Manager, Pegasus Instant Messenger, Document Management, and Pegasus Dashboards.
Pegasus Opera II Client.msi	The setup program for Client installations
Opera.exe	The application program for Opera II
Opera.chm	The compiled HTML Help system for Opera II
AppPath.ini	A file that points to the location of the Opera.ini file
Opera.ini	The Opera II initialisation file
Opera.sys	The system file containing the customer activation key
Pegrel.txt	The Pegasus Release file

Creating the Opera II PDF Printer in 64 bit Windows editions

The PDF printer is automatically created when you install the Client software. The installation program first tests whether the PDF printer exists on the Client computer. If it exists; it does not try to create it again.

If the Operall_PDFPrinter is deleted on computers running 64 bit Microsoft Windows products, Opera II cannot automatically reinstall it the next time it outputs to PDF.

To make sure that Opera II does not delete the printer driver after each print to PDF; ensure the 'Keep The PDF Printer' option is ticked on the System Preferences form in the System module. New installations of Opera II switch this on by default.

Follow these steps to re-install the Operall_PDFPrinter if it is deleted on Windows (64 bit editions).

To Reinstall the Operall PDFPrinter

1. Go to the Opera II Client (Static) folder. By default the location is C:\Program Files (x86)\Pegasus\Client XXX (where XXX=VFP or SQL).
2. Double-click the *PDFInst.exe* program. This will reinstall the PDF printer. You will need to log in to the computer with Administrator rights.