



Opera 3
Installation &
Upgrade Guide



Opera 3
Installation Guide



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Introduction	4
About this Guide	4
Platform Specific Information.....	4
Other Opera 3 Guides and Help	4
Pegasus Scheduler: Open Source Licences	5
Feedback.....	5
Deployment Options	6
Installation Fundamentals	6
Database Considerations	7
[VFP] Microsoft Visual Foxpro	7
[SQL] Microsoft SQL Server.....	7
Windows User Account Control	8
Document Management & Pegasus Dashboards	9
Document Management.....	9
Pegasus Dashboards.....	9
Dashboards Manager.....	9
Installing Opera 3 for the first time on Stand-Alone PCs	10
Installing Opera 3 for the first time on Client-Server installations	11
Upgrading from earlier versions of Opera 3	12
Upgrading from Opera II to Opera 3	13
Activating the Software and Logging On	14
Running Updating Data Structures	15
Removing Opera 3	16
Repairing Opera 3	17
Installing or Upgrading Pegasus Scheduler with server-side processing (2.0 or later)	18
Installing or Upgrading Pegasus Stocktake	19
Appendix A – Opera 3 Server Folders	20
Folders for Static Data (Read).....	20
Folders for Dynamic Data (Read/Write).....	20
Appendix B – Opera 3 Client Folders	22
Folders for Program 'Static' Data (Read).....	22
Folders for 'Dynamic' Data (Read/Write)	22
Appendix C – Opera 3 Share Names	23
Appendix D – Stocktake Folders	24
Folders for Static Data (Read).....	24
Folders for Dynamic Data (Read/Write).....	24
Appendix E – Pegasus Scheduler Folders	25
Folders for Static Data (Read).....	25
Folders for Dynamic Data (Read/Write).....	25
Appendix F – Scheduler Share Names & Installation Notes	26
Microsoft Windows (32-bit).....	26
Microsoft Windows (64-bit).....	26
Microsoft SQL Server or SQL Server Express.....	26
Firewall Settings TCP ports.....	26
TCP ports.....	27
SMTP Email Server.....	27
Local System Account Windows user.....	27
Appendix G – Programs and other Important Files	28
Appendix F – iTextSharp Licences	29
GNU LESSER GENERAL PUBLIC LICENSE	29
MOZILLA PUBLIC LICENSE Version 1.1	33



About this Guide

This Installation Guide provides information concerning the installation and initial configuration of Opera 3. It also includes guidance for upgrading from Opera II to Opera 3.

The guide assumes you are conversant with networking environments, and have prerequisite knowledge of the supported Microsoft Windows server and desktop editions and other software environment applications identified in this guide.

The guide does not cover the configuration of a network environment.

A separate guide, the System Requirements guide, details the computer hardware and software specifications that are required to install and use Opera 3 and Opera 3 SQL. It also includes guidance on using Opera 3 in a Terminal Services environment.

Platform Specific Information

Opera 3 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.

Other Opera 3 Guides and Help

The following user documents are on the Opera 3 CD and in the Opera 3 Client installation's main folder, normally C:\Program Files\Pegasus\O3 Client XXX\User documents (32-bit Windows products) or C:\Program Files (x86)\Pegasus\O3 Client XXX\User Documents (64-bit Windows products) where XXX is either VFP or SQL.

Some guides are also available on the Opera 3 button menu.

Readme File

The Readme file contains late breaking news and other release-specific information. You can also view the file from the Opera 3 CD installation menu.

Demonstration Data Guide

This guide is provided to assist in the use of the demonstration data. It is recommended that the Help is used at the same time.

Implementation Guide

The Implementation Guide provides a high-level view of Opera 3 and how to approach an implementation. It details how the modules are integrated, and recommends the order in which elements should be set up.

System Requirements Guide

The System Requirements Guide details the recommended hardware and software requirements that are required to install and use Opera 3 and Opera 3 SQL. Check this guide on your Opera CD for the latest supported Windows products. It also includes guidance on using Opera 3 and Opera 3 SQL in a Terminal Services or Remote Desktop Services environment.

Tip: The guide is published on the **Opera 3 Info Centre** at www.pegasus.co.uk/opera3infocentre/ProductHelp.htm.

Opera 3 Help

Opera 3 Help includes details of the new features in this release of Opera 3 and provides details of all the functions available in the application.

Information	Description
Concept	An 'Introduction to ...' topic that gives an overview of an application, describes the different areas of an application, and includes a chart of how the applications link together.
Reference	These topics describe the different boxes on each form in Opera 3.
Task	These topics describe the steps required to do tasks in Opera 3.
New Features	A 'What's New' Help file provides information on features in a new release, plus other information that is relevant to the release that can be read on-screen.

Document Management & Pegasus Dashboards Guides

Installation Guides are available for both Document Management and Pegasus Dashboards. A user guide is also available for Pegasus Dashboards. Help for Document Management is in the Opera 3 Help. The guides are in the respective folders on the Opera 3 CD and can be accessed from the Opera 3 CD Installation Menu.

Pegasus Scheduler: Open Source Licences

Pegasus Scheduler uses the iTextSharp library licenced under the GNU Lesser General Public Licence 2.1 and Mozilla Public License Version 1.1 (detailed in Appendix F).

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 3 Install Guide" in the subject box. Please note that product support is not offered through the above email address.



Installation Fundamentals

The Opera 3 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 3 from the client computer.

Stand-Alone Installations

The stand-alone installation is the simplest deployment of Opera 3. 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 3 at any one time. This can be a laptop or desktop computer that meets the minimum requirements detailed in the System Requirements guide, which is on the Opera 3 CD.

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 3 at any one time.

[VFP] SPM Remote Installations

An SPM (Sales Pipeline Management) Remote installation is a stand-alone deployment of Opera 3. The Client and Server software are both installed on a single laptop computer.



Opera 3 uses a Microsoft Visual FoxPro database and Opera 3 SQL uses a Microsoft SQL Server database. Pegasus Document Management, which is part of both Opera 3 and Opera 3 SQL, also uses a Microsoft SQL Server database.

[VFP] Microsoft Visual Foxpro

Opera 3 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 3 installation.

[SQL] Microsoft SQL Server

Opera 3 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 3 SQL is installed.

Please see the System Requirements Guide on the Opera 3 Info Centre at www.pegasus.co.uk/opera3infocentre/ProductHelp.htm for the list of supported Microsoft SQL Server databases.



Microsoft Windows *User Account Control* (UAC) allows you use your computer without elevated administrator privileges until they are required. 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.

Before the Opera 3 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 3 and Opera 3 SQL, you need Administrator security permissions.

Installation Folders

These are the suggested locations for Opera 3 installations on these Windows products:

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

For more information about the Opera 3 folders in all supported Windows products, see [Appendix A](#) (on page 20) and [Appendix B](#) (on page 22).



Pegasus Document Management and Pegasus Dashboards are installed independently of Opera 3. Both products are included on the Opera 3 CD and have separate installation programs and related installation guides. If you are installing and activating an Opera 3 system that includes Document Management or Pegasus Dashboards, you must install these products before running Opera 3.

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

Document Management

Pegasus Document Management is an integrated Opera 3 application that provides secure document capture and retrieval functionality both in the Document Management module and throughout Opera 3. 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 3 installation. If you use the application, the latest version of the product must be installed from the Opera 3 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 3.

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

Document Management Desktop

Document Management Desktop works directly from your Microsoft Windows desktop. It 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 software does not need to be installed on the computer to use Document Management Desktop.

Pegasus Dashboards

Pegasus Dashboards provides a flexible way of displaying your Opera 3 or Opera 3 SQL data in a graphical format in Microsoft Internet Explorer. The product uses special views to display your Opera 3 data that are created by the Update Data Structures (UDS) command in Opera 3 if Pegasus Dashboards is installed.

If you use Pegasus Dashboards, the latest version of the product must be installed from the Opera 3 CD before the UDS command is run.

Dashboards Manager

The Dashboards Manager module allows you to create your own custom-designed dashboards and charts to display data for all Opera 3 modules according to your requirements. Any bespoke modifications to your Opera 3 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 3 installation.



Installation Guide

Installing Opera 3 for the first time on Stand-Alone PCs

BEFORE THE INSTALLATION

- Log on to the computer using a user who is a member of the Administrators' group.
- Close all applications.
- Install Microsoft .NET Framework 4 Extended Profile or Microsoft .NET Framework 4.5 if not already installed. Check **Roles and Features** on Windows Server editions or **Programs and Features** if you are unsure whether it is already installed.
- Insert the Opera 3 CD into the stand-alone PC to view the installation menu. The menu is displayed when you insert the CD into the PC. If it is not, double-click *Menu.exe* in the main folder on the CD.

DOING THE INSTALLATION

- Click Opera 3 and then click **Release Guide** and **Readme** to read information about the release.
- Have your licence form ready that was supplied with your software.
- Click **Install Opera 3** on the installation menu to install the Opera 3 Server installation on the PC.
- 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.
- Open the **Pegasus Opera 3 Server** desktop folder and double-click the **Install Client** shortcut to install the Opera 3 Client Installation on the PC.

USING OPERA 3

- If you use Document Management or Pegasus Dashboards, install them before using Opera 3. For instructions, click **Pegasus Document Management** or **Pegasus Dashboards** on the install menu and then click **Installation Guide**.
- If you use Pegasus Scheduler, install it before using Opera 3. See page 18 for assistance.
- Run Opera 3 using the Desktop shortcut and enter your licence details in the **Activation** form. See page 14 for assistance.
- Follow the instructions in the Opera 3 Implementation guide for guidance on how to set up the applications you have purchased.



Installation Guide

Installing Opera 3 for the first time on Client-Server installations

BEFORE THE INSTALLATION

-
- Log on to the computer using a user who is a member of the Administrators' group.
- Close all applications.
- Install Microsoft .NET Framework 4 Extended Profile or Microsoft .NET Framework 4.5 if not already installed. Check **Roles and Features** on Windows Server editions or **Programs and Features** if you are unsure whether it is already installed.

This is not required on Opera 3 client workstations unless you are installing Pegasus Scheduler or Pegasus Stocktake.
- Insert the Opera 3 CD into the server computer. Then click Opera 3 and then click **Release Guide** and **Readme** to read information about the release.
- Have your licence form that was supplied with your software ready to add your activation details.

RUNNING THE SERVER INSTALLATION

-
- Click **Install Opera 3** on the installation menu to install the Opera 3 Server. The installation updates the computer's registry and the necessary files and folders so the Opera 3 Server installation must be done at the file server computer rather than from a remote PC.
- Follow the instructions on the screen.
- Open the **Pegasus Opera 3 Server** desktop folder and double-click the **Install Client** shortcut to install the Opera 3 Client Installation on the server computer.
- Open the **Pegasus Opera 3** desktop folder and double-click the **Opera 3** shortcut to run Opera 3 on the server computer.
- Enter your licence details in the Opera 3 **Activation** form. See page 14 for assistance.

RUNNING THE CLIENT PC INSTALLATIONS

-
- Go to the `\\<Server>\Server XXX Static\Client Setup\` folder, where `<Server>` is the server's name, and `XXX` is either `VFP` or `SQL`. If the server software was installed in a non-default location, go to the `\\<Server>\Server XXX Static and Dynamic\Client Setup\` folder.
- Open the **Exe** subfolder and double-click *Setup.exe* to run the client installation. Repeat for each client computer.
- Ensure that everyone has the necessary security permissions on the client computer.
 1. Go to the Opera 3 client installation folder. (`C:\Program Files\Pegasus\O3 Client XXX\` or `C:\Program Files (x86)\Pegasus\O3 Client XXX\` where `XXX` is either `VFP` or `SQL`.)
 2. Right-click the Client installation's folder.
 3. Select **Properties**.
 4. Click the **Security** tab and select each user's name
 5. Tick the **Full Control** box in the **Allow** column.
 6. Click **OK**.
- If you use Document Management or Pegasus Dashboards, install them before using Opera 3. For instructions, click **Pegasus Document Management** or **Pegasus Dashboards** on the install menu and then click **Installation Guide**.
- If you use Pegasus Scheduler or Stocktake, install them before using Opera 3. See pages **18** and **19**.
- Follow the instructions in the Opera 3 Implementation guide for guidance on how to set up the applications you have purchased.



Installation Guide

Upgrading from earlier versions of Opera 3

BEFORE THE INSTALLATION

- Log on to the computer using a user who is a member of the Administrators' group.
- Close all applications.
- Insert the Opera 3 CD into the server computer to view the upgrade menu. The menu is displayed when you insert the CD into the computer. If it is not, double-click *Menu.exe* in the main folder on the CD.
- Click Opera 3 and then click **Release Guide** and **Readme** to read information about the release.
- If you have a new licence details form, have it on hand ready to add your activation details.

RUNNING THE SERVER INSTALLATION

- Click **Install Opera 3** on the installation menu to upgrade the Opera 3 Server. The installation updates the computer's registry and the necessary files and folders so the Opera 3 Server installation must be done at the file server computer rather than from a remote PC.
- Follow the instructions on the screen.
- Open the **Pegasus Opera 3** desktop folder and double-click the **Opera 3** shortcut to run Opera 3 on the server computer.
- If you have a new licence details form, enter your licence details in the Opera 3 **Activation** form. See page 14 for assistance.

RUNNING THE CLIENT PC INSTALLATIONS

- Run Opera as normal on each client PC. A message will indicate that the version of the server software is different to the client.

Click **Yes** to upgrade the client installation. Then follow the on-screen instructions.
- Ensure that everyone still has the necessary security permissions on the client computer.
 1. Go to the Opera 3 client installation folder. (*C:\Program Files\Pegasus\O3 Client XXX* or *C:\Program Files (x86)\Pegasus\O3 Client XXX* where XXX is either *VFP* or *SQL*.)
 2. Right-click the Client installation's folder.
 3. Select **Properties**.
 4. Click the **Security** tab and select each user's name
 5. Tick the **Full Control** box in the **Allow** column.
 6. Click **OK**.
- If you use Document Management or Pegasus Dashboards, install the latest versions before using Opera 3. For instructions, click **Pegasus Document Management** or **Pegasus Dashboards** on the install menu and then click **Installation Guide**.
- If you use Pegasus Scheduler or Stocktake, install them before using Opera 3. See pages 18 and 19.
- Follow the instructions in the Opera 3 Implementation guide for guidance on how to set up any new applications you have purchased.



Installation Guide

Upgrading from Opera II to Opera 3

In this checklist, 'XXX' represents either VFP or SQL as appropriate for your installation. For information on paths and folders mentioned in this checklist, see [Appendix A](#) (on page 20). If bespoke projects are used with Opera II, they must be copied manually to Opera 3. They must be carefully tested to ensure they are compatible with Opera 3.

BEFORE THE UPGRADE	UPGRADING SYSTEM AND DATA FILES	AFTER THE UPGRADE
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Close Opera II and make sure everyone is logged out of the application.	<input type="checkbox"/> Run Opera 3, enter your activation key Log and log in to the application as <i>ADMIN</i> . See page 14 for assistance.	<input type="checkbox"/> Log in to Opera 3 again
<input type="checkbox"/> Take a full backup of your Opera II installation from which you intend to upgrade, including system, data, reports, etc.	<input type="checkbox"/> Open the Upgrade - System Upgrade form. Follow the on-screen prompts to copy the Opera II system files to Opera 3.	<input type="checkbox"/> Open the System - Utilities - Update Data Structures form and select all companies. Complete the steps to update the files to the Opera 3 format.
<input type="checkbox"/> Close all other applications. Then follow the steps in the Installing Opera 3 for the first time on Client-Server installations checklist above to install Opera 3 Server and Client installations on the same server computer as the Opera II server. These must both exist on the same computer in order to upgrade.	<input type="checkbox"/> Log out of Opera 3. If you need to move the company data, do this manually using Windows Explorer after running the System Upgrade wizard. Then change the data path on the Company Profiles form for each company to the new location.	<input type="checkbox"/> Check the details on these forms on the System – Maintenance menu are correct: People Profiles, User Profiles, Company Profiles, Report Layout and E-Mail Profiles. Check that the system preferences on the System - Utilities menu are correct. Also ask each user to check the System – Preferences form to ensure their user preferences are correct.
<input type="checkbox"/> If you are using any special bespoke applications or reports with Opera II, copy the files to the Opera 3 location.		<input type="checkbox"/> If you use Document Management or Pegasus Dashboards, install the latest versions before using Opera 3. For instructions, click Pegasus Document Management or Pegasus Dashboards on the install menu and then click Installation Guide .
<input type="checkbox"/> If you have Reporter reports appended to the Opera II menus, take a note of these. You will need to append them to the Opera 3 menus after upgrading.		<input type="checkbox"/> If you intend to use Pegasus Scheduler or Stocktake , install them before using Opera 3. See pages 18 and 19 for assistance. <input type="checkbox"/> If you had Reporter reports appended to your Opera II menus, append them to the Opera 3 menus using the Append to Menu command from the Report Manager form. <input type="checkbox"/> After using Opera 3 for a period of time, you may remove the Opera II installation if you want to. Take a full data backup beforehand.



Installation Guide

Activating the Software and Logging On

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 familiarise yourself with the software.

DEMONSTRATION AND EVALUATION ACTIVATIONS



- To evaluate the software using the demonstration data, enter either *EVAL* or *DEMO* in the **Activation Key** box.
 - DEMO opens Orion Vehicles Leasing – a demonstration company which is refreshed every time you use Opera 3 until you enter your activation details.
 - EVAL also opens Orion Vehicles Leasing and is not refreshed until a limit is reached.If you are using demonstration data with Opera 3 SQL, a form is displayed for specifying the location of the demonstration data. Select or overtype the SQL Server and Database names as required and click OK.

- Enter a User ID of either *MANAGER* or *ADMIN* and leave the password blank. Then click **Logon**.

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 on the **Activation Details** form, including the correct letter case. Then click **Activate**. You must enter your:
 - Company Name,
 - Post Code,
 - Activation Date,
 - Licence Number, Serial Number and Activation Key.If you fail to enter these details accurately, you are denied access to the software.
- In case of difficulty, consult your Pegasus Partner.
- If the licence details include SPM Remote capabilities, the activation process includes the message *'The details include Sales Pipeline Management Remote capabilities. Do you want to activate this system for remote use?'*
 - Select **Yes** if the PC will be used as an SPM Remote laptop.
 - Select **No** if the computer is part of the Opera 3 back-office system.
- Enter a User ID of either *MANAGER* or *ADMIN* and leave the password blank. Then click **Logon**.
- For security reasons, add passwords for both *MANAGER* and *ADMIN* in the **System – Maintenance - User Profiles** command. See the F1 Help for details.



Installation Guide

Running Updating Data Structures

Update Data Structures checks the integrity of the data files and ensures that the system database and company databases reflect the latest data structures defined in the Opera 3 data dictionary. The data dictionary comprises the tables and fields in the application, which change from one release to the next. Update Data Structures must be used after upgrading from Opera II, after upgrading from earlier versions of Opera 3, or after upgrading from Opera 3 to Opera 3 SQL.

If you use the Additional Systems feature, which allows more than 36 companies to be used in Opera 3, you must run Update Data Structures in each system.

Tip: You can use Pegasus Scheduler to run Update Data Structures automatically at a chosen time. Instructions to install Pegasus Scheduler are detailed on page 18 of this guide.

UPDATING DATA STRUCTURES

-
- Log on to Opera 3 as the *ADMIN* user.
- Run the **System - Utilities - Update Data Structures** form without selecting any companies. This will update the system files for this release of Opera.
Follow the instructions on the form.
- Open the **System - Maintenance - User Profiles** form. In the **Allow Access to Companies** section at the bottom of the form, select all companies you want to include in the update and data validation process. The **Update Data Structures** command will update only the companies you select here.
Save the changes and close the form.
- Log off and then log on again as the ADMIN user. You will now have access to the companies you selected on the **User Profiles** form.
- Use the **System - Utilities - Backup** form to back up your data.
- Run the **System - Utilities - Update Data Structures** form.
Click **Next** and select the companies to update. Click **Next** again. If the Payroll application is used, select all the companies to update their statutory rates. This is necessary only if the statutory rates have not been updated for the current tax year. Click **Next** again.
Select the administrator options as necessary on the third page. Then click **Next** again to start the update.
- When the update is complete, select the **View Audit File** button to see the audit log that was created during the update. If there were any problems they will be recorded in the log.
- See the F1 Help for details about the **Update Data Structures** command.



Installation Guide

Removing Opera 3

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

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 baggage files like the DLL and OCX files that were installed are removed. 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 3 were later than those already on the computer, they will remain on the computer after the un-installation is complete.

Windows Group Policy: To remove Opera 3 Clients that were installed using Windows Group Policy, you must remove the Group Policy Object (GPO) for the Opera 3 Client installation in the Microsoft Windows Group Policy software and select the "Immediately Un-Install the software from Users and Computers" option.

-
- Open the Windows **Control Panel**.
- Click **Uninstall a Program**. 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 software from the computer. Click either the **Allow** button or **Yes** button to continue.
- Select *Pegasus Opera 3 Client* from the list.
- Click **Uninstall** and follow the on-screen instructions.
- Select *Pegasus Opera 3 Server* from the list.
- Click **Uninstall** and follow the on-screen instructions.
- Using **Windows Explorer**, check the *Static* and *Dynamic* locations for files and folders left on the computer and remove them.



Installation Guide

Repairing Opera 3

You can use the **Repair** option in the Windows **Control Panel** to repair some problems with the Opera 3 server or Opera 3 client installations. The instructions to use the **Repair** option depend on the Microsoft Windows product you use. It may however be necessary to uninstall and then reinstall the software. See the [Removing Opera 3](#) checklist for instructions on how to remove the server and Client software.

-
- Open the Windows **Control Panel**.
- Click **Programs**.
- Click **Programs and Features**.
- Select *Pegasus Opera 3 Server* from the list.
- Right-click and select **Repair**.
- Follow the on-screen instructions.
- When the server installation has been repaired, select *Pegasus Opera 3 Client* from the list.
- Right-click and select **Repair**.
- Follow the on-screen instructions.



Installation Guide

Installing or Upgrading Pegasus Scheduler with server-side processing (2.0 or later)

PREPARATION: INSTALLING OPERA 3, MICROSOFT .NET & MICROSOFT SQL SERVER

- If the latest version of Opera 3 is not installed, install it on the Opera 3 server by using either the [Installing Opera 3 for the first time on Stand-Alone PCs](#) checklist, the [Installing Opera 3 for the first time on Client-Server installations](#) checklist, or the [Upgrading from earlier versions of Opera 3](#) checklist.

Both the client and server installations must be installed.
- Install Microsoft .NET Framework 4 Extended Profile or Microsoft .NET Framework 4.5 if not already installed. Check **Roles and Features** on Windows Server editions or **Programs and Features** if you are unsure whether it is already installed.
- Install Microsoft SQL Server if it is not already installed.

See **Appendix F** on page 26 for important information about using Microsoft SQL Server.
- Make sure that no one is logged in to Opera 3.

INSTALLING THE SCHEDULER SERVER AND CLIENT ON THE OPERA 3 SERVER

- Make sure that all applications are closed and also that the Opera 3 CD is inserted in the Opera 3 server.
- At the Opera 3 Server, install the Pegasus Scheduler server software. From the CD setup menu, click **Pegasus Scheduler** and then click **Install Pegasus Scheduler**. The setup menu is displayed when you insert the CD into the server. If it is not displayed, run *Menu.exe* from the main folder on the CD.
- At the Opera 3 Server, install or upgrade the Pegasus Scheduler client software. Run *Setup.exe* from either:

C:\Program Files\Pegasus\Scheduler Server\ClientSetup (32-bit Windows)
or
C:\Program Files (x86) \Pegasus\Scheduler Server\ClientSetup (64-bit Windows).

INSTALLING THE CLIENT ON THE OPERA 3 WORKSTATIONS

- On each Opera 3 workstation where Pegasus Scheduler will be used, install or upgrade the client software.

Run *Setup.exe* from the `\\<Server>\Scheduler Static\ClientSetup\` shared location (where `<Server>` is the Opera 3 server).
- Log in to Opera 3 using the ADMIN user. Then open the **System - Scheduling** folder or click the **Administration** tab on the ribbon bar and click **System - Scheduling**. Then click **Task Scheduler**.

A form is displayed so you can enter the Microsoft SQL Server details. This only applies for new installations; upgrades will use the same database as before.
- After entering the SQL Server details, update the Pegasus Scheduler **Set Options** form.

See the **F1** Help for assistance.



Installation Guide

Installing or Upgrading Pegasus Stocktake

PREPARATION: INSTALLING OPERA 3 AND MICROSOFT .NET

-
- If the latest version of Opera 3 is not installed, install it on the Opera 3 server by using either the [Installing Opera 3 for the first time on Stand-Alone PCs](#) checklist, the [Installing Opera 3 for the first time on Client-Server installations](#) checklist, or the [Upgrading from earlier versions of Opera 3](#) checklist.

Both the client and server installations must be installed.
- Install Microsoft .NET Framework 4 Extended Profile or Microsoft .NET Framework 4.5 if not already installed. Check **Roles and Features** on Windows Server editions or **Programs and Features** if you are unsure whether it is already installed.
- Install Microsoft SQL Server if it is not already installed.
- Enable SQL Server's TCP/IP protocol in SQL Server Configuration Manager if Stocktake will not be installed on the same computer where SQL Server is installed.
- Make sure that no one is logged in to Opera 3 and all other applications are closed.

DOING THE STOCKTAKE INSTALLATION

- Important:** Stocktake is a standalone application which relies on the Opera 3 Client being installed. You must install both the Opera 3 Client and Stocktake on the computer where Stocktake will be used.

Stocktake is designed to be installed on one computer only.
- From the Opera 3 CD installation menu, click **Pegasus Stocktake** and then click **Install Pegasus Stocktake**.

The install menu is displayed when you insert the CD into the computer. If it is not, double-click *Menu.exe* in the main folder on the CD.
- Follow the instructions on the screen. You are notified when Stocktake is installed successfully.

If you have upgraded an existing Stocktake installation, Stocktake is now ready to be used. For new installations, follow the instructions under "AFTER NEW STOCKTAKE INSTALLATIONS".

AFTER NEW STOCKTAKE INSTALLATIONS

-
- Run Opera 3 and open the System folder and click **Maintenance - Company Profiles** or click the **System** tab on the Ribbon Bar and then click **Company Profiles**.

On the **Options** tab on the **Company Profiles** form, tick the **Stocktake** option.
- Run the **Update Data Structures** command from the **System – Utilities** menu to create a default Stocktake Profile.
- Open the **Stock** folder and click **Stocktake** or click the **Supply Chain Management** tab on the Ribbon Bar and then click **Stock – Stocktake**.
- Select the Microsoft SQL Server installation from the list and enter the name of the database for Stocktake. This only applies for new installations; upgrades will use the same database as before.
- See the **F1** Help for assistance.



Where 'XXX' is mentioned, it refers to either VFP or SQL as appropriate for your installation. 'x86' refers to 32-bit Windows products. 'x64' refers to 64-bit Windows products.

Folders for Static Data (Read)

Windows	Folder
Windows Server 2012 R2	C:\Program Files (x86)\Pegasus\Server XXX
Windows Server 2012	C:\Program Files (x86)\Pegasus\Server XXX
Windows SBS 2011 Essentials	C:\Program Files (x86)\Pegasus\Server XXX
Windows SBS 2011	C:\Program Files (x86)\Pegasus\O3 Server XXX
Windows Server 2008 R2	C:\Program Files (x86)\Pegasus\O3 Server XXX
Windows Server 2008 (x86)	C:\Program Files\Pegasus\O3 Server XXX
Windows Server 2008 (x64)	C:\Program Files (x86)\Pegasus\O3 Server XXX
Windows 8 (x86)	C:\Program Files\Pegasus\Server XXX
Windows 8 (x64)	C:\Program Files (x86)\Pegasus\Server XXX
Windows 7 (x86)	C:\Program Files\Pegasus\O3 Server XXX
Windows 7 (x64)	C:\Program Files (x86)\Pegasus\O3 Server XXX
Windows Vista (x86)	C:\Program Files\Pegasus\O3 Server XXX
Windows Vista (x64)	C:\Program Files (x86)\Pegasus\O3 Server XXX

The following subfolders are under this location:

Folder	Purpose
Client Setup	Contains the files necessary to install the Opera 3 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)

The location of the Dynamic (read-write) data for the Server installation depends on the Windows product on the computer.

Windows	Folder
Windows Server 2012 R2	C:\ProgramData\Pegasus\Server XXX
Windows Server 2012	C:\ProgramData\Pegasus\Server XXX
Windows SBS 2011	C:\ProgramData\Pegasus\O3 Server XXX
Windows Server 2008 R2	C:\ProgramData\Pegasus\O3 Server XXX
Windows Server 2008 (x86)	C:\ProgramData\Pegasus\O3 Server XXX
Windows Server 2008 (x64)	C:\ProgramData\Pegasus\O3 Server XXX
Windows 8 (x86)	C:\ProgramData\Pegasus\Server XXX
Windows 8 (x64)	C:\ProgramData\Pegasus\Server XXX
Windows 7 (x86)	C:\ProgramData\Pegasus\O3 Server XXX
Windows 7 (x64)	C:\ProgramData\Pegasus\O3 Server XXX
Windows Vista (x86)	C:\ProgramData\Pegasus\O3 Server XXX
Windows Vista (x64)	C:\ProgramData\Pegasus\O3 Server XXX

Dynamic Data

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 3.
Bespoke	Files relevant to third-party development
Data	Company database files.
DataDict	Data dictionary used by the Opera 3 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



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	Folder
64-bit Windows	C:\Program Files (x86)\Pegasus\O3 Client XXX
32-bit Windows	C:\Program Files\Pegasus\O3 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	Files and additional folders concerning the application's framework
Framework Support	
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)

The location of the Dynamic (read-write) data for the client installation is:

C:\ProgramData\Pegasus\O3 Client XXX

This subfolder is under this location:

Folder	Contains
Temp	Various temporary files created during certain processes



The following table shows the network share names 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. The folders listed in the above table assume the default folder locations have been selected during the installation.

Microsoft Windows (32-bit)

UNC Share Name	Folder
Server XXX Static	C:\Program Files\Pegasus\O3 Server XXX
Server XXX Dynamic	C:\ProgramData\Pegasus\O3 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\O3 Client XXX

Microsoft Windows (64-bit)

UNC Share Name	Folder
Server XXX Static	C:\Program Files (x86)\Pegasus\O3 Server XXX
Server XXX Dynamic	C:\ProgramData\Pegasus\O3 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\O3 Client XXX

Share Permissions for Opera 3 Client and Server Installations

Everyone using Opera 3 must have full permissions for both the Client and Server folders. The installation of the Opera 3 Client and Opera 3 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.

Important: 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.



Folders for Static Data (Read)

The default location for program files contains a *Pegrel.txt* file as well as required program files. It also contains a linked help file (*Stocktake.chm*).

Windows	Folder
64-bit Windows	C:\Program Files (x86)\Pegasus\Stocktake
32-bit Windows	C:\Program Files\Pegasus\Stocktake

Folders for Dynamic Data (Read/Write)

The location of the Dynamic (read-write) data for Stocktake is:

C:\ProgramData\Pegasus\Stocktake.

This location contains a *Pegrel.txt* file which holds the version of Stocktake. The location also holds the *Settings.xml* which holds configuration settings for the Stocktake database (SQL Stocktake database details) and is recommended not to be opened or edited. Any errors which occur within Stocktake are logged here.



Folders for Static Data (Read)

The default location for program files contains a *Pegrel.txt* file as well as *ScheduleRunner.exe* – the program file for running task that are set up in Scheduler. A folder called **ClientSetup** contains the Scheduler client installation file.

Windows	Folder
Windows Server 2012 R2	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows Server 2012	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows SBS 2011	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows Server 2008 R2	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows Server 2008 (x86)	C:\Program Files\Pegasus\Scheduler Server
Windows Server 2008 (x64)	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows 7 (x86)	C:\Program Files\Pegasus\Scheduler Server
Windows 7 (x64)	C:\Program Files (x86)\Pegasus\Scheduler Server
Windows Vista (x86)	C:\Program Files\Pegasus\Scheduler Server
Windows Vista (x64)	C:\Program Files (x86)\Pegasus\Scheduler Server

Folders for Dynamic Data (Read/Write)

The location of the Dynamic (read-write) data for Scheduler depends on the Windows product on the Opera 3 server.

This location contains a *Pegrel.txt* file which holds the version of Scheduler. The location also holds various files which hold configuration settings and task results. A folder called **History** contains the audit logs for each task run in the Scheduler.

Any errors which occur within Stocktake are logged here.

Windows	Folder
Windows Server 2012 R2	C:\ProgramData\Pegasus\Scheduler Server
Windows Server 2012	C:\ProgramData\Pegasus\Scheduler Server
Windows SBS 2011	C:\ProgramData\Pegasus\Scheduler Server
Windows Server 2008 R2	C:\ProgramData\Pegasus\Scheduler Server
Windows Server 2008	C:\ProgramData\Pegasus\Scheduler Server
Windows 7	C:\ProgramData\Pegasus\Scheduler Server
Windows Vista	C:\ProgramData\Pegasus\Scheduler Server



Microsoft Windows (32-bit)

UNC Share Name	Folder
Scheduler Static	C:\Program Files\Pegasus\Scheduler Server
Scheduler Dynamic	C:\ProgramData\Pegasus\Scheduler Server

Microsoft Windows (64-bit)

UNC Share Name	Folder
Scheduler Static	C:\Program Files (x86)\Pegasus\Scheduler Server
Scheduler Dynamic	C:\ProgramData\Pegasus\Scheduler Server

Microsoft SQL Server or SQL Server Express

Microsoft SQL Server or SQL Server Express (2008, 2012, or 2014) is required to store the Pegasus Scheduler (with server-side processing) database. The Scheduler Service needs to connect to the SQL Server to access its database. Additionally, if Opera 3 SQL is used, then the Scheduler Service will need to access the company databases.

Tip: This article may be useful - Hardware and Software Requirements for Installing SQL Server 2012 - [msdn.microsoft.com/library/ms143506\(v=SQL.110\).aspx](http://msdn.microsoft.com/library/ms143506(v=SQL.110).aspx).

SQL Server Management Studio

The required settings depend on whether Pegasus scheduler is using either:

- Windows Authentication mode - where the Windows User account is used to connect to SQL Server, or
- SQL Server Authentication mode - where a SQL Server login name and password are used to connect to SQL Server.

Windows Authentication mode

The Scheduler Service runs as the Local System account in Microsoft Windows. This Windows account is listed as NT AUTHORITY\SYSTEM in SQL Server. This login must be granted the dbcreator server role. If a standalone SQL server is being used then the SYSTEM account on the Opera 3 server must be added to SQL Server logins. To add a computer you must use a login name of "domain/computer\$", e.g. CORPDOMAIN/SERVER2\$.

SQL Server Authentication mode

Do not use the 'sa' Login for the Scheduler as this account has very broad permissions. Add a new Login using SQL Server authentication and grant it the dbcreator Server Role. Password expiration should be turned off.

Opera 3 SQL Databases

If you are running Opera 3 SQL, then the Scheduler Service running on the Opera 3 server will need access to the company databases. Opera 3 SQL company databases are located on the Opera 3 server. The Scheduler Service runs as the Local System account in Windows. This Windows account is listed as NT AUTHORITY\SYSTEM in SQL Server. This Login must be allowed to access the SQL Databases.

Firewall Settings TCP ports

You must consider firewall settings for SQL Server and Scheduler.

TCP ports

Set these ports in the incoming rules:

- On the SQL Server allow TCP port 1433 in the incoming rules
- On the Scheduler server, allow TCP port 51920 in the incoming rules
- On the mail server, allow TCP port 25 in the incoming rules (port 25 is the default - change as required if the mail server uses a different port number). The mail server may need to open up the Simple Mail Transfer Protocol (SMTP) port if it has not previously been used, or if it was previously used, but was restricted to certain machines.

SMTP Email Server

In order to configure the mail server settings in Pegasus Scheduler (with server-side processing) after the installation, you will first need to find out the appropriate SMTP settings in order to communicate with the mail server. The mail server may need configuring to allow emails to be sent to it from the Scheduler server. Instructions for this vary based on the type and version of the Mail Server software, so we cannot give exact instructions here.

Local System Account Windows user

The Scheduler Windows service uses the 'Local System Account' Windows user. This is automatically set for you when Pegasus Scheduler (with server-side processing) is installed.

Important: Permissions are not set up automatically for you; you need to set them up manually in Windows.

The Local System Account must have necessary permissions to the following:

- Full permissions to the network share name on the Opera 3 server called 'O3 Server XXX Dynamic' (where XXX is either VFP or SQL).
- Full permissions to the Opera 3 SQL databases (Opera 3 SQL only).

If a repeat invoicing task has been set up from the **Repeat Invoice** command in the Sales Order Processing or Invoicing applications and it has been set up to print to a specified printer, that printer must have been set up by a Windows user at the Opera 3 server.

Tip: If the Opera 3 data is not located on the Opera 3 server, it may be desirable to run the Scheduler Service as a different Windows account. This can be done by changing the service settings in Computer Management. The account settings for the service will have to be reapplied every time the Scheduler Service is upgraded.



Opera

Program / File

Menu.exe

Purpose

The 'one-stop shop' installation menu program on the Opera 3 CD to run the install programs for Opera 3, Pegasus Scheduler, Pegasus Stocktake, Online Filing Manager, Pegasus Instant Messenger, Document Management and Pegasus Dashboards. You can also view user guides from here.

Pegasus Opera 3

The setup program for Client installations

Client.msi

Opera.exe

The application program for Opera 3

Opera.chm

The compiled HTML Help system for Opera 3

AppPath.ini

A file that points to the location of the Opera.ini file

Opera.ini

The Opera 3 initialisation file

Opera.sys

The system file containing the customer activation key

Pegrel.txt

The Pegasus Release file



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Version 2.1, February 1999

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