

# online filing manager

**Installation Guide**



Online Filing Manager

Installation Guide

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# Installation Guide

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# Installation Guide

## Introduction

This guide provides information concerning the installation and configuration of Online Filing Manager (2.xx). It assumes you are conversant with personal computers and networking environments, and have prerequisite knowledge of Microsoft Windows and other software environment applications identified in this guide.

<b>Note:</b> <i>xx</i> is used throughout this guide to represent part of the version number of Online Filing Manager, for example; 2.00, or 2.50.
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### Readme File

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

You are advised to read the contents of this file before you install or begin using the application. The Readme file (`Readme.html`) is in html format and is stored on the CD in the main Online Filing Manager folder.

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## Installing Online Filing Manager for the first time

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

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

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

### To Start the Installation

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

- Using the Windows *Start* button:
  - i. Click the Windows *Start* button, then click *Run*.
  - ii. In the *Open* box, type the following command (including the quotes), (for example, where *d* is the letter that identifies the CD drive)

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

### Installing the Prerequisites

**Note:** If your computer is running Windows XP SP2, you can skip this section and go to the [Installing Online Filing Manager](#) section.

Unless you are installing Online Filing Manager on a Windows XP computer running Service Pack 2 (SP2), you must install a number of prerequisites before you can successfully install Online Filing Manager (2.xx). These prerequisites are [Adobe Reader](#), [Microsoft Data Access Components \(MDAC\)](#), and [MSXML](#). If you attempt to install Online Filing Manager (2.xx) when any of these are missing from your computer, a message is displayed listing the missing prerequisites.

### To Install the Prerequisites

1. From the Online Filing Manager installation window, click Prerequisites.
2. Click to select the component to be installed from the list provided.
3. Follow the instructions on the screen.
4. If the setup wizard detects that your computer needs to be restarted after installing any of the prerequisites, the *Restarting the System* dialog is displayed. You must restart the system to ensure the components operate correctly, however, you may restart the system yourself later if choose to do so. If you are installing more than one prerequisite, you may decide to leave rebooting until all are installed.
5. When you have installed the prerequisites and restarted your computer, move to the next stage of the installation for Online Filing Manager (2.xx).

## Installing Online Filing Manager

If you skipped the [Installing the Prerequisites](#) section because the prerequisite components are already installed on your computer, or if you have completed the installation of the prerequisite components, follow the steps below to install Online Filing Manager.

**Note:** If you restarted your computer after installing the prerequisites, follow the instructions in the [To Start the Installation](#) section to start the installation program again.

### To Install Online Filing Manager

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

#### Stage 1 – Welcome

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

#### Stage 2 – Destination Folder

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

#### Stage 3 – Ready to Install

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

#### Stage 4 – Installing

The installation program first verifies whether the prerequisites are installed on the computer. If any are not, a message is displayed listing which prerequisites are missing. In this case, you must install the relevant prerequisites as described in the [Installing the Prerequisites](#) section.

**Note:** If you have already installed these prerequisites and they are still listed as missing, then you must restart the computer before continuing with the installation.

If the prerequisites are present on the computer, the installation program extracts and installs the Online Filing Manager files from the CD.

#### Stage 5 – Installation Completed

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

Click *Finish* to complete the installation. You can now use Online Filing Manager (2.xx).

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## Upgrading from Online Filing Manager (1.00)

If you are currently using Online Filing Manager (1.00), Online Filing Manager (2.xx) must be installed as a new installation in a new location on your computer. Do not uninstall Online Filing Manager (1.00) before installing Online Filing Manager (2.xx) as existing User & Agent details, configuration details, and Audit history are copied across automatically from Online Filing Manager (1.00).

Before starting the upgrade, close as many applications as possible and read the `Readme.html` file for any late breaking information. The file is on the CD in the main Online Filing Manager folder.

### To Start the Installation

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

- Using the Windows *Start* button:
  - i. Click the Windows *Start* button, then click *Run*.
  - ii. In the *Open* box, type the following command (including the quotes), (for example, where *d* is the letter that identifies the CD drive)

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

### Installing the Prerequisites

As you are upgrading to Online Filing Manager (2.xx) from an earlier version, all the prerequisites should already be installed on your computer. However, the Online Filing Manager (2.xx) CD includes a more up to date version of Adobe Reader - version 7.0.8. Adobe Reader (6.0) was previously included on the Online Filing Manager (1.00) CD.

You can use either versions 6.0 or 7.0.8 to view the PDF guides, but there are a number of benefits to using the later version, including performance. For more information on the Adobe Reader, see <http://www.adobe.com/products/acrobat>.

### To Install the Adobe Reader (7.0.8)

1. From the Online Filing Manager installation window, click *Prerequisites*.
2. Click *Install Acrobat Reader*.
3. Follow the instructions on the screen.
4. When you have installed Adobe Reader (7.0.8), move to the next stage of the upgrade for Online Filing Manager (2.xx).

## Installing Online Filing Manager

If you skipped the [Installing the Prerequisites](#) section because the prerequisite components are already installed on your computer, or if you have completed the installation of the prerequisite components, follow the steps below to install Online Filing Manager.

**Note:** If you restarted your computer after installing the prerequisites, follow the instructions in the [To Start the Installation](#) section to start the installation program again.

### To Install Online Filing Manager

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

#### Stage 1 – Welcome

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

#### Stage 2 – Destination Folder

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

#### Stage 3 – Ready to Install

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

#### Stage 4 – Installing

The installation program first verifies whether the prerequisites are installed on the computer. If any are not, a message is displayed listing which prerequisites are missing. In this case, you must install the relevant prerequisites as described in the [Installing the Prerequisites](#) section of this guide.

**Note:** If you have already installed these prerequisites and they are still listed as missing, then you must restart the computer before continuing with the installation.

If the prerequisites are present on the computer, the installation program extracts and installs the Online Filing Manager files from the CD.

#### Stage 5 – Installation Completed

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

Click Finish to complete the installation.

As described at the beginning of this chapter, upgrading from Online Filing Manager (1.00) consists of a new installation of Online Filing Manager (2.xx) on the same computer. When this is finished, you should check that existing User and Agent details, and Audit history were copied across to the new version.

Once you are comfortable the details have been copied across, you can remove Online Filing Manager (1.00) using the instructions in the [Uninstalling an Existing Installation](#) chapter.

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### Upgrading from earlier versions of Online Filing Manager (2.xx)

Before starting the upgrade, close as many applications as possible and read the `Readme.html` file for any late breaking information. The file is on the CD in the main Online Filing Manager folder.

If you are currently using an earlier version of Online Filing Manager (2.xx), the programs will be upgraded to the later version of Online Filing Manager (2.xx) during the installation.

#### To Start the Upgrade Installation

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

- Using the Windows *Start* button:
  - i. Click the Windows *Start* button, then click *Run*.
  - ii. In the *Open* box, type the following command (including the quotes), (for example, where *d* is the letter that identifies the CD drive)

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

#### Installing the Prerequisites

As you are upgrading to Online Filing Manager (2.xx) from an earlier version, all the prerequisites should already be installed on your computer. However, the Online Filing Manager CD includes a more up to date version of Adobe Reader - version 7.0.8. Adobe Reader (6.0) was previously included with Online Filing Manager.

You can use either versions 6.0 or 7.0.8 to view the PDF guides, but there are a number of benefits to using the later version, including performance. You should remove version 6 before installing version 7.

For more information on the Adobe Reader, see <http://www.adobe.com/products/acrobat>.

#### To Install the Adobe Reader (7.0.8)

1. From the Online Filing Manager installation window, click *Prerequisites*.
2. Click *Install Acrobat Reader*.
3. Follow the instructions on the screen.
4. When you have installed Adobe Reader (7.0.8), move to the next stage of the upgrade for Online Filing Manager (2.xx).

## Upgrading Online Filing Manager

If you skipped the [Installing the Prerequisites](#) section because the prerequisite components are already installed on your computer, or if you have completed the installation of the prerequisite components, follow the steps below to install Online Filing Manager (2.xx)

**Note:** If you restarted your computer after installing the prerequisites, follow the instructions in the [To Start the Upgrade Installation](#) section to start the installation program again.

### To Upgrade Online Filing Manager

1. In the Online Filing Manager installation window, click the *Install Online Filing Manager* option.
2. The InstallShield Wizard is displayed. Follow the instructions on the screen and click *Next* to start the upgrade installation.

#### Prerequisites

The upgrade installation program first verifies whether the prerequisites are installed on the computer. If any are not, a message is displayed listing which prerequisites are missing. In this case, you must install the relevant prerequisites as described in the [Installing the Prerequisites](#) section of this guide. If the prerequisites are present on the computer, the installation program extracts and upgrades the Online Filing Manager files from the CD.

**Note:** If you have already installed these prerequisites and they are still listed as missing, then you must restart the computer before continuing with the installation.

#### User, Agent and Configuration details

The upgrade installation program then attempts to copy existing Online Filing Manager User details (gguser.ini), Agent details (ggagent.ini), and configuration details (ggsys.ini) so that the details are retained after the upgrade is finished. Each file is copied to the same filename with an extension of *.bak*.

If the details cannot be copied the following message appears (the default folder location is used here):

```
Unable to preserve 'C:\Documents and Settings\All
Users\Application Data\Pegasus\OFM\<filename.ini>'.
```

The upgrade installation program then terminates.

To resolve the issue, first reboot the computer and attempt the upgrade installation again. If the message still appears, rename the User details (gguser.ini) to *gguser.bak*, Agent details (ggagent.ini) to *ggagent.bak*, and configuration details (ggsys.ini) to *ggsys.bak*. Then attempt the upgrade installation again.

If the upgrade installation program was able to take a copy of the three files, the upgrade is completed and it then attempts to update the new installation with these details. If one or more of the files cannot be updated the same message appears but, as the details were previously successfully copied, the upgrade installation program completes. You then need to rename each of the files included in the message to their original filename before using Online Filing Manager. For example, if the User detail's file was not updated, you should rename the file from *gguser.bak* to *gguser.ini*. The default location for the files is:

```
C:\Documents and Settings\All Users\Application Data\Pegasus\OFM\
```

## Restarting the computer

If the upgrade installation program determines that your computer must be restarted before you can use Online Filing Manager, a message is displayed giving the option of restarting your computer now, or quitting the setup and restarting the computer later. If this message is displayed, you must restart your computer before using Online Filing Manager.

Click *Finish* to complete the upgrade installation, then click *Exit* on the Online Filing Manager installation window.

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### Starting Online Filing Manager

#### **To Start Online Filing Manager**

1. Click the Windows *Start* menu button.
2. On your programs menu, locate and click *Online Filing Manager*.

Refer to the Online Filing Manager Help for information about using the application. You can view this from the *Help* menu.

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## Uninstalling an Existing Installation

It is possible to have more than one version of Online Filing Manager concurrently on the same computer. You must therefore ensure that you carefully select the version you require to uninstall.

### **To Uninstall an Existing Installation of Online Filing Manager (1.00)**

1. Open the Windows Control Panel.
2. Double-click Add/Remove Programs.
3. Select `Pegasus Online Filing Manager` from the list.
4. Click Remove.
5. Follow the on-screen instructions.

### **To Uninstall an Existing Installation of Online Filing Manager (2.xx)**

1. Open the Windows Control Panel.
2. Double-click Add/Remove Programs.
3. Select `Pegasus OFM` from the list.
4. Click Remove.
5. Follow the on-screen instructions.

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## Appendix A - Files, Folders and Programs

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

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

### Folders for Static Data (Read-only)

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

```
C:\Program Files\Pegasus\OFM
```

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

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

### Folders for Dynamic Data (Read/Write)

Dynamic data for the Online Filing Manager is installed and maintained in the following location:

```
C:\Documents and Settings\All Users\Application Data\Pegasus\OFM
```

The following table describes the subfolders under this location:

Folder	Purpose
Data	The folder that can be used to store the source payroll information file.
Audit	The folder in which Online Filing Manager stores copies of the files sent to and received from the Government Gateway (for example, the end-of-year payroll P14/P35 submission).

### Programs

Online.exe	The executable program for Online Filing Manager.
------------	---

### Other Files

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

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## Appendix B – Glossary of Terms

- Adobe Reader is software that allows you to read guides in portable document format (PDF).
- Microsoft Data Access Components (MDAC) is software that enables Online Filing Manager to securely link to the [Government Gateway](#) to submit online PAYE returns and forms over the internet. For more information, see the Microsoft web site at <http://support.microsoft.com/kb/842193/>.
- Microsoft's XML Parser (MSXML) is software that enables Online Filing Manager to check that the XML data that is securely sent to the Government Gateway is syntactically correct. Online Filing Manager uses MSXML version 3.0, which is also shipped with Internet Explorer 6.0 and Windows XP SP2.