



**PegaREACH Installation  
and Connection Guide**

**Release 8.1**

**July 2002**



© 2002 Pegasystems Inc.

All rights reserved.

This document and the software described herein are provided pursuant to a License Agreement containing restrictions on their use. This document and the software contain valuable trade secrets and proprietary information of Pegasystems Inc. and are protected by federal copyright law, international laws or applicable treaties.

Neither this document nor the software may be copied, modified, translated or distributed in any form or medium, disclosed to third parties, or used in any manner not provided for in said agreement, except with written authorization from Pegasystems Inc. Refer to your written agreement with Pegasystems Inc. which outlines your rights and obligations in detail.

This document is current as of the date of publication only. Changes in the code, and hence in the document, may be made from time to time at Pegasystems' discretion. This document remains the property of Pegasystems and must be returned to it upon request.

This document may include references to subsystems and functionality of the Pegasystems product which have not been licensed by your company. If you have questions about whether a particular capability is included in your installation, please consult your Pegasystems client consultant.

Pegasystems, PegaSYSTEM, PegaARCHIVE, PegaCALL, PegaCARE, PegaCHECK, PegaCONNECT, PegaINDEX, PegaLINK, PegaPAYMENTS, PegaPOWER, PegaPRISM, PegaREACH, PegaREELAY, PegaSEARCH, PegaSURE, PegaTEL, PegaVIEWACE, PegaWEB, PegaWORKS are trademarks of Pegasystems Inc.

Other brand or product names are trademarks or registered trademarks of their respective holders.

This document is the property of:  
Pegasystems Inc.

101 Main Street  
Cambridge, MA 02142-1590  
(617) 374-9600, fax: (617) 374-9620

Document: PegaREACH 8.1 Installation and Connection Guide

July, 2002

Order #: @DREAINS81

**Confidential - Reproduction is prohibited.**

# Contents

<b>Introduction</b> .....	<b>1-1</b>
What is PegaREACH? .....	1-3
Editions .....	1-4
User Edition.....	1-4
Professional Edition.....	1-4
Full Edition.....	1-5
Benefits of PegaREACH .....	1-6
Hardware and Software Requirements .....	1-7
Minimum Workstation Hardware .....	1-7
Required Workstation Software.....	1-8
PegaSYSTEM Hardware and Software .....	1-9
Alternatives to PegaREACH .....	1-10
Contacting Pegasystems Inc.....	1-11
Support.....	1-11
ActionPlus .....	1-11
Offices .....	1-12
<b>Server Configuration</b> .....	<b>2-1</b>
Defining the ZISK Agent.....	2-2
Editing the PegaSYSTEM Preference.INI File .....	2-3
Starting the ZISK Agent .....	2-7
<b>Installing PegaREACH</b> .....	<b>3-1</b>
Upgrading versus Installation.....	3-1
Validating the Version of Internet Explorer.....	3-3
Planning Your Installation .....	3-4
Running the Setup .....	3-5
Installation Warnings and Tests .....	3-10
NT Bootstrap Installation .....	3-11
Upgrading.....	3-12
Creating and Using a Silent Installation File .....	3-13
Installation from a Network Drive .....	3-15
Un-installing PegaREACH .....	3-16
To un-install:.....	3-16
<b>Connections and Signon</b> .....	<b>4-1</b>
Starting PegaREACH Professional .....	4-2
Entering Connection Parameters .....	4-3
Entering Pool Information.....	4-6
Connect and Sign On.....	4-7
Starting PegaREACH.....	4-9
Run Time Operations .....	4-10
Interacting with Internet Explorer .....	4-11
<b>File List</b> .....	<b>A-1</b>
Temporary Files .....	A-3
Executable Programs.....	A-4
PegaREACH Program Libraries.....	A-6

Microsoft and Other Vendor Files .....	A-8
PegaREACH ActiveX Controls.....	A-9
Third-party ActiveX Controls .....	A-11
Help, INI, Text, PTR, and Other Files .....	A-12
Image Files.....	A-17
Conversion Utility Files.....	A-19
Java Class Files .....	A-20
Obsolete Files .....	A-21
Word Correspondence Files .....	A-22
<b>REACH.INI Preferences .....</b>	<b>B-1</b>
[PegaREACH] Section .....	B-2
[REACHSizing] Section.....	B-4
[Workbench Sizing] Section .....	B-6
[FRMPGLST] Section.....	B-7
<b>How to run PegaREACH 8.1 with a 7.1 PegaSYSTEM .....</b>	<b>C-1</b>
Procedures.....	C-2
Migrating the DEFquery.txt file .....	C-3
Moving the Files .....	C-3
<b>Handling Installation Problems .....</b>	<b>D-1</b>
Installation is slow or stalled.....	D-2
Word Correspondence installation problems .....	D-2
Reach does not run after installation (Desktop or Laptop) .....	D-3
Reach does not run after installation (Laptops).....	D-5

# *Chapter 1*

## *Introduction*

---

This document describes PegaREACH 8.1 installation and connection. It is written for system administrators and those responsible for installation and workstation technical support.

PegaREACH Release 8.1 was released in July 2002 and operates best with Release 8.1 of the PegaSYSTEM. Release 8.1 of the PegaSYSTEM was released in July 2002.

However, almost all features of PegaREACH 8.1 work with Releases C98.1, C98.2, 7.1, and 7.2 of the PegaSYSTEM. Proper handling of lists of tag-data objects on these versions requires that you apply some data modifications to the host PegaSYSTEM. See Appendix C for details. The ability to manage tag-data objects in projects and to move them via the PegaMOVE utility are only supported on a Release 7.2 or higher PegaSYSTEM.

This manual provides information on:

- ◆ PegaREACH compared with other PegaSYSTEM client products
- ◆ Minimum workstation hardware and software

- ◆ Required PegaSYSTEM server configuration for communications
- ◆ Installation
- ◆ Connection configuration

Appendices provide reference information on

- ◆ Files installed with PegaREACH
- ◆ Contents of the REACH.INI preference file
- ◆ Modifications to prior version PegaSYSTEMs to support tag-data object lists
- ◆ Handling Installation Issues

For information on using PegaREACH, or for the Workflow Architect who is configuring a PegaSYSTEM for use with PegaREACH, consult the help files that are installed with PegaREACH:

- ◆ **WBHELP.CHM** — Configuring the PegaSYSTEM
- ◆ **PROHELP.CHM** — Using Professional
- ◆ **WORKBENCH.CHM** — Using Workbench
- ◆ **PEGAWEB.CHM** — Using PegaWEB
- ◆ **IOS.CHM** — ImageNet Output Server
- ◆ **ARCHIVE.CHM** — PegaINDEX and PegaSEARCH
- ◆ **OBSOLETE.CHM** — Obsolete Files

These files are installed when you install PegaREACH 8.1.

## What is PegaREACH?

PegaREACH is a 32-bit Windows client software product that works in conjunction with a PegaSYSTEM Central Server, or with a distributed PegaSYSTEM that includes a Central Server plus one or more satellite servers.

PegaREACH operates on Microsoft's 32-bit platforms (Windows 95, Windows NT 4, Windows 98, Windows 2000, and Windows XP) and works in conjunction with the C97.1 release PegaSYSTEM or later. (C Series PegaSYSTEMs use the C++ programming language.)

PegaREACH does not support direct connections to P Series PegaSYSTEMs, regardless of version. If you have a P Series PegaSYSTEM, PegaREACH can work with your PegaSYSTEM only indirectly, through a satellite C Series PegaSYSTEM. The primary P Series platform, IBM OS/390 CICS, uses the PL/1 (P Series) programming language.

## Editions

PegaREACH has three editions: the User Edition, the Professional Edition, and the Full Edition. Each edition is designed for a specific user community.

### User Edition

The User Edition provides features used by the most users and has the smallest memory, processor, and disk space requirements. It provides full access to HTML forms that have been configured for your company's workflows, terms, and user interface standards.

You can configure the menus and other features of the User Edition to allow "production line" users access only to those features needed. Eliminating unnecessary features makes the User Edition easier to learn and use.

The look and feel of the User Edition is similar to World Wide Web browser interactions. The User and Professional Editions incorporate the display and interaction components of Microsoft's Internet Explorer, version 4 or higher.

### Professional Edition

The Professional Edition is for those users who are not expected to learn or use PegaSYSTEM rule files, but who can benefit from some analytical, management, and diagnostic features.

For example, the Workflow Tracing, Management Reporting Wizard, and Action Wizard are available in the Professional Edition, but not the User Edition.

Professional Edition users can either enter commands (such as IENT and EMAI) or execute GMENU HTML input forms. Almost all capabilities of the PegaSYSTEM are available from the Professional Edition.



## **Full Edition**

The Full Edition includes Professional and Workbench. Workbench is an optional, add-on module for Workflow Architects who use the RULE command to create and maintain the rule configuration on their PegaSYSTEM.

Although it is possible to work on most Rule records in the Professional Edition, the Workbench component provides an easy-to-use, productive, and attractive presentation of PegaSYSTEM rule forms.

Workbench users must have the Professional Edition installed. The Workbench edition requires Windows NT software, and substantially more memory, disk space, and processor power than the Professional or User Editions.

## Benefits of PegaREACH

Both the PegaREACH User Edition and the PegaREACH Professional Edition offer fundamental advances over previous PegaSYSTEM client software:

- ◆ Substantial configuration commonality with PegaWEB
- ◆ Full HTML version 4 support for pages in the Session Panel, including tables, client-side image maps, and local anchors, offering true WWW look and feel.
- ◆ Open Authoring of HTML using many Web authoring tools, such as Microsoft's Front Page, Softquad's Hot Metal Pro, and Sausage Software's Hot Dog.
- ◆ 32-bit operation takes advantage of your Pentium class hardware and operating system.
- ◆ Microsoft native Winsock-based TCP/IP communications, eliminating third-party software needed for such communications in Windows 3.1 and PegaVIEWACE.
- ◆ Secure, reliable dialup connections can be achieved from Windows NT clients using RAS and PPP protocol.
- ◆ Built-in "Explorers" let users define and keep shortcuts to particular work items, rules, and operations.
- ◆ Extensive facilities in Workbench to support the productivity of Workflow Architects, including Project Tracking and PegaMOVE.
- ◆ Performance and response improvements and reduced network traffic, through selective caching of scripts, images, and DHTML fragments.

# Hardware and Software Requirements

## Minimum Workstation Hardware

### User and Professional Edition

- ◆ 166 MHz Pentium chip processor
- ◆ Local disk space of 60 megabytes (half of this is for Microsoft's Internet Explorer, including cache space)
- ◆ 256 colors
- ◆ SVGA screen resolution (800 x 600 pixels) or better
- ◆ 32 MB of main memory

### Workbench Edition

For a user of the Workbench Edition, the minimum hardware requirements are:

- ◆ 266MHz Pentium
- ◆ 64 MB of real memory

**Note:** Resolution higher than 800 x 600 is highly desirable for Workbench.

## Required Workstation Software

Users must have write access to create local, temporary files on the disk that also contains the executable and read-only files. PegaREACH can not be “executed” from a shared, read-only network drive.

The local operating software for the Full or Professional or User Edition should be:

- ◆ Windows NT 4.0 Workstation with Service Pack 3 or later

**Note:** Microsoft strongly recommends that NT 4 Service Pack 3 be installed prior to any installation of Internet Explorer Version 4.0 or 4.01. Pegasystems has not tested PegaREACH with NT Service Pack levels below SP3.

The Professional or User Edition workstations can use:

- ◆ Windows 95
- ◆ Windows 98
- ◆ Windows 2000
- ◆ Windows XP

All workstations must have Microsoft’s Internet Explorer, version 4.01 SP1 or Version 5 installed. PegaREACH does not operate with version 3 of Internet Explorer.

**Note:** PegaREACH 8.1 does not require that

- the workstation have an internet or intranet connection
- Microsoft’s Internet Explorer be the only browser installed
- Internet Explorer be the default browser.

Version 3.5.1 of NT is *not* supported.

## PegaSYSTEM Hardware and Software

PegaREACH connects to any Central Server or satellite PegaSYSTEM that uses release C98.1 or later.

However, certain PegaREACH 8.1 facilities require later releases of PegaSYSTEM server software. Some features require release C98.2. A few features require a release 7.1 or higher PegaSYSTEM. Project tracking and PegaMOVE support for Tag-Data objects require release 7.2 of the PegaSYSTEM or higher.

PegaSYSTEM C Series software is available on any of the following platforms:

- ◆ IBM RS/6000 systems using AIX
- ◆ Sun SPARC systems running Solaris
- ◆ Hewlett Packard HP-UNIX
- ◆ Windows NT 4.0 Server

PegaREACH *cannot* connect to PL1-based PegaSYSTEMs. If you have a P-Series PegaSYSTEM (version P97.1 or later), you must install a C Series satellite to use PegaREACH..

## Alternatives to PegaREACH

In addition to PegaREACH, Pegasystems offers two other approaches to a PC client interface:

- ◆ **PegaWEB** — Users with a standard WWW browser such as Netscape Navigator or Microsoft Internet Explorer can access a PegaSYSTEM through an Intranet, or through the Internet, once appropriate security tests have been passed. Installation of PegaWEB requires a Netscape Commerce Server or Microsoft IIS system that supports the HTTP protocol. Client machines may be running Windows, Windows95, OS/2, Windows NT, MacOS, or any other system that supports TCP/IP and HTTP.
- ◆ **PegaVIEW ACE** — A 16-bit Windows application, ACE connects to both 1997-era C Series PegaSYSTEMs and older P Series PegaSYSTEMs, and supports IBM APPC LU 6.2 connections and DECnet Pathworks connections in addition to the TCP/IP connections supported by PegaWEB and PegaREACH. PegaVIEWACE remains the preferred client product for older PCs (486-based technology and low-end Pentium processor based PCs).

**Note:** Windows 95 and NT users can use PegaVIEW ACE (version 3.5 or later) in 16-bit compatibility mode. PegaVIEW ACE continues to be available and supported, but no enhancement releases are expected after 1998.

# Contacting Pegasystems Inc.

## Support

The Global Technology Support (GTS) organization provides customer support services for Pegasystems' production customers. A regionally based GTS Field Engineer is assigned to each customer to provide responsive support to emergency and routine issues. Various Service Level Agreements (SLA) are available with defined response and escalation procedures. GTS can also provide performance evaluation and tuning, technical planning, and information operations training.

Pegasystems provides *all – hours* contact numbers:

- ◆ North America: 1-800-414-8064
- ◆ Europe: +44 1344 845 643
- ◆ Pacific Rim: +61 1 800 243 966
- ◆ Singapore: +61 9430 6212

## ActionPlus/PartnerAction

ActionPlus and PartnerAction are one-stop resources for an ever-growing list of information supporting Pegasystems' customers and partners in their successful implementation and utilization of Pegasystems' CRM solutions. Through Web-based self-service, available 24x7, you can access the site to interact with Pegasystems online. With your unique login ID and password entered, you can:

- ◆ Create and track project action items: including system issues with a severity level of 3 or 4 (minor issues) or 5 (enhancement requests), configuration questions, requests for support or consulting services, and other general questions.

**Note:** If issues impact production PegaSYSTEMs and have a Severity Level 1 (production down with no alternative available) or Severity Level 2 (production down with alternative available), the all-hours numbers for emergency support must be used.

- ◆ Order or download product documentation and marketing materials: Including release notes, installation guides, operations guides, the latest marketing collateral, and other valuable product information.

- ◆ Participate in Discussion Groups where you can post questions, share first hand experiences and develop valuable contacts with other Pegasystems' customers and partners.
- ◆ Get up-to-the-minute Pegasystems news, including educational offerings, upcoming events and trade show appearances, and much more.

For more information, contact [aplus@pegasystems.com](mailto:aplus@pegasystems.com) or your primary Pegasystems contact. You'll need World Wide Web access from a Windows workstation equipped with Microsoft's Internet Explorer version 5.

## Offices

<b>Headquarters</b>	
Pegasystems Inc. 101 Main Street Cambridge, MA 02142-1590	Phone: 617-374-9600 Fax: 617-374-9620
<b>Alpharetta</b>	
Pegasystems Inc. Deerfield Center 12600 Deerfield Parkway Alpharetta, GA 30004	Phone: 678-566-3602 Fax: 678-566-3616
<b>Chicago</b>	
Pegasystems Inc. Three First National Plaza 70 West Madison, Suite 1400 Chicago, IL 60602	Phone: 312-214-7227 Fax: 312-214-7255
<b>Irving</b>	
Pegasystems Inc. 222 W. Colinas Blvd. Suite 1715 North Millennium Ctr. Irving, TX 75039	Phone: 972-444-8444 Fax: 972-444-0458
<b>New York</b>	
Pegasystems Inc. Three New York Plaza, 16th Floor New York, NY 10004-2480	Phone: 212-269-8850 Fax: 212-344-6818



<b>San Francisco</b>	
Pegasystems Inc. Suite 900 595 Market Street San Francisco, CA 94105	Phone: 415-512-9230 Fax: 415-512-1474
<b>Toronto</b>	
Pegasystems Co. The Exchange Tower 130 King Street West, Suite 1800 Toronto, ON M5X 1E3 Canada	Phone: 416-860-6233 Fax: 416-860-6227
<b>United Kingdom</b>	
Pegasystems Ltd. Apex Plaza Reading, Berkshire RG1 1AX United Kingdom	Phone: 44-118-959-1150 Fax: 44-118-959-1174
<b>Paris</b>	
Pegasystems Ltd. 72, rue du Faubourg Saint-Honoré Paris, 75008 France	Phone: 33-1-40 07 86 80 Fax: 33 -1-40 07 82 96
<b>Sydney</b>	
Pegasystems Pty. Ltd. Suite 2702, Australia Square 264 George Street Sydney, NSW 2000 Australia	Phone: 61-02-9251-7977 Fax: 61-02-9251-8815
<b>Melbourne</b>	
Pegasystems Pty. Ltd. Level 50, 101 Collins Street, Melbourne, 3000 Australia	Phone: 61-039-653-9345 Fax: 61-039-653-9451
<b>Singapore</b>	
Pegasystems Singapore Level 37, Singapore Land Tower 50 Raffles Place Singapore 048623	Phone: +65 3208485 Fax: +65 3208486

# *Chapter 2*

## *Server Configuration*

---

This chapter describes the configuration needed on your PegaSYSTEM to enable PegaREACH connections. Additional configuration is needed on each workstation to identify the network node, TCP/IP port number, and PegaSYSTEM known to PegaREACH.

All PegaREACH connections use TCP/IP communications, which are included in Windows NT and Windows 95/98.

On the PegaSYSTEM Server machine (a Central Server or a Satellite), a background listener process known as the **ZISK** Agent performs communications functions similar to the UNIX INETD daemon. You must define the agent's properties, assign a TCP/IP port number, and define a PegaREACH signon script. Each of these procedures is described in this chapter.

## Defining the ZISK Agent

Within the PegaSYSTEM, the **GAGENT** rule file defines which instances of agents (background processes) are active on your PegaSYSTEM. The **ZISK** agent is defined by one record in that rule file, which typically has a key of exactly **ZISK**, but may also be called **ZISKx**, where X is one alphanumeric character. PegaREACH connections to a Satellite Server require an instance of the **ZISK** agent process must be active and running on that Satellite Server, not just on the Central Server.

### To define a GAGENT record:

1. Connect to the PegaSYSTEM Central Server using Telnet
2. Use the **RULE** command to add a record with the key **ZISK** (or **ZISK1**, **2**, etc). The GAGENT Record Addition screen appears.

process name	descr	TCP/IP Connection Manager	optima	value	default
run on node	Pega001	Pega001	is primary node		
server enabled?				Y	Y
CICS trans suffix					
group identifier					
prerequisite group					
delay start (sec)				0	0
wakeup (seconds)				0	0
use I/O server?				N	N
wait when idle?				N	N
statistics?				N	N
relocatable?					
queue name					
subqueue					
queue file					
comments	TCP/IP Connection manager (replicates UNIS SNETU functionality).				

Figure 2-1. GAGENT Record through ACE

3. *If this is a distributed PegaSYSTEM*, in the Run On Node field enter the node name and PegaSYSTEM prefix ID for the satellite that you want this instance to execute on. Otherwise, enter the current node.
4. In the Server Enable field, enter Y. Leave all other fields blank or accept the default values.

## Editing the PegaSYSTEM Preference.INI File

To configure a connection between PegaREACH and a PegaSYSTEM, you must edit the preference file used when the PegaSYSTEM starts. You can use any text editor to edit the Preferences file.

This file is typically named **DDD\_PREFERENCE.INI** and is found in the **LOCALCOM** directory, where *DDD* is the a three-character identifier, known as the prefix, of the particular PegaSYSTEM.

### Connections to Windows NT PegaSYSTEMs

Follow the steps below to edit the Windows NT Preference file for connections to your PegaSYSTEM.

1. Locate the PegaREACH and PegaVIEW ACE communications sections in the **zcp** section of the Preference.ini file.

```
[comm.prof]
# define the cooperative processing connections for ACE
and PegaREACH
zcp      =& zcp_ddd@kkk
reach    =& reach_ddd@kkk
```

where *ddd* is the name of the PegaSYSTEM and *kkk* is the NT node name.

2. Define the **zisk** agent in its own section as shown below.

```
[comm.services.zisk]
zcp      =& zcp_ddd@kkk
reach    =& reach_ddd@kkk
```

3. Identify parameters for the PSON program (that is executed upon each PegaREACH connection) in the **comm.service.reach** section:

```
[comm.service.reach]
path = c:\.....\bin\zcxpson.exe
args = /zcp/zsk:%sock%/zxc/zza4
output = c:\.....\logfiles\coop_%sock%.log
```

- ◆ **args** line contains various run time switches, some of which are optional.

- ◆ **/zzcp** identifies this connection as using the PegaSYSTEM's "cooperative processing" — a group that includes PegaPRISM, PegaVIEWACE, PegaREACH and PegaREELAY. Required.
- ◆ **/zza4** identifies this connection as specific to PegaREACH. This is used *in addition* to the **L00A6** switch. Required.
- ◆ **/zxc1** (not shown in the above example), indicates that this connection is to a PegaSYSTEM that is a satellite to another PegaSYSTEM. Optional.
- ◆ **/zxc** allows connections whether or not the PegaSYSTEM is up (that is, whether or not the control process has been created by PSUP processing). This switch is useful during testing and experimentation, but should not be included for production work. Connections to PegaSYSTEMs that are down require only that the Lock Manager process and the **ZISK** agent process be running.

4. Add port information into the **comm.reach\_ddd** section:

```
[comm.reach_ddd$kkk]
node = XXXXXXx
port = NNNN
type = 4
frameformat = 1
!
```

where **NNNN**=is the TCP/IP port number - up to 5 digits - (not an Internet IP address) that you choose to assign to PegaREACH connections.

## Connections to UNIX PegaSYSTEMs

If you are running a UNIX PegaSYSTEM, you must make slightly different changes to the preferences file.

1. Locate the PegaREACH and PegaVIEWACE communications sections in the [**comm.prof**] section of the Preferences.ini file.

```
[comm.prof]
# define the cooperative processing connections for ACE
and PegaREACH
zcphost  =& zcphost_ddd@kkk
reach    =& reach_ddd@kkk
```

where **ddd** is the name of the PegaSYSTEM and **kkk** is the name of the PegaSYSTEM server.

2. Define the **ZISK** agent that supports communication. It is defined in its own section, as shown below.

```
[comm.services.zisk]
zphost
reach
```

3. Identify the PSON signon script that calls the zcxpson program and sets switches for the PegaSYSTEM. Identify this script in the **comm.service.reach** section (entering a UNIX user name to use for logins is optional).

```
[comm.service.reach]
path = /dsksubj05/c71syb/localcom/reach_login.ksh
user=the pegauser
```

The reach\_login.ksh script turns on the following switches:

- ◆ **/zzcp** identifies this connection as using the PegaSYSTEM's “cooperative processing” — a group that includes PegaPRISM, PegaVIEWACE, PegaREACH and PegaREELAY. Required.
- ◆ **/zza4** identifies this connection as specific to PegaREACH. This is used *in addition* to the **/zzcp** switch. Required.

Optional: Modify the reach\_login.ksh script to turn on other switches:

- ◆ **LJwpos**=For 7.1 only. Do not send system events to ZER4 agent.
- ◆ **Lwpvm**=For 7.1 only. Use old ZERSYEV logical file for system events.
- ◆ **/ZZFR**=For 7.1 only. Send I/O from this process to ZIO7 concentrator.
- ◆ **/zzc1** (not shown in the above example), indicates that this connection is to a PegaSYSTEM that works as a satellite to another PegaSYSTEM. Optional.
- ◆ **/zzxc** allows connection whether or not the PegaSYSTEM is up (that is, whether or not the control process has been created by

PSUP processing). This switch is useful during testing and experimentation, but should not be included for production work. Connections to PegaSYSTEMs that are down require only that the Lock Manager process and the **ZISK** agent process be running. Optional.

The **reach\_login.ksh** file looks like this:

```
#!/bin/ksh
#-----
--
# File location: $PEGAPATH/localcom/reach_login.ksh
#-----
---

cd $HOME
if [[ -a /etc/profile ]] ; then
  . /etc/profile
fi
if [[ -a $HOME/.profile ]] ; then
  . $HOME/.profile
fi
if [[ -a $HOME/.kshrc ]] ; then
  . $HOME/.kshrc
fi

mypid=$(date + reach_%y%m%d_$$)
process_log=$PEGAPATH/logfiles/${mypid}.log

date > $process_log
cd $PEGAPATH/zwork

echo "PEGASYSTEM IS: $PEGASYSTEM" >> $process_log >&1
pson /zzcp/zza4 >> $process_log 2 >&1

exit
```

4. Add port information into the **comm.reach\_ddd** section

```
[comm.reach_ddd@kkk]
node = xxxxxx
port = NNNN
format = PEGACP
!
```

where **NNNN** is the 4 character TCP/IP port number (not an Internet IP address) you selected for PegaREACH connections.



## Starting the ZISK Agent

Once the agent is configured, the **ZISK** agent process should start the next time you bring up the PegaSYSTEM using the PSUP process. When the **ZISK** agent starts, it creates a log in the /logfiles directory, typically named **ZZISK\_MMDDYY.LOG**, where *MMDDYY* is the current date.

# *Chapter 3*

## *Installing PegaREACH*

---

This chapter describes how to install PegaREACH from the CD, and how to upgrade from an older release. Included are instructions on how to:

- ◆ validate the version of Internet Explorer
- ◆ Plan your installation
- ◆ Run the setup
- ◆ Un-install previous releases of PegaREACH
- ◆ Design and perform a silent install

### **Upgrading versus Installation**

Use the installation procedure and CD to upgrade an earlier release of PegaREACH to PegaREACH 8.1, or to install PegaREACH for the first time. Do not attempt to install two copies of PegaREACH on one workstation.

If upgrading, the new files overlay and replace the existing PegaREACH files. You do not need to back up any files before upgrading. You do not

need to de-install the earlier release of PegaREACH, unless you are also changing the edition of PegaREACH. For example, you must de-install PegaREACH if you are changing from PegaREACH Professional to PegaREACH Workbench or vice-versa. This constraint is enforced by the installation procedure.

**Caution:** Do not attempt to install two distinct copies, or two distinct releases, of PegaREACH on one workstation.

## Validating the Version of Internet Explorer

Before you install PegaREACH, verify that you have Microsoft's Internet Explorer (MSIE) version 4.01, 4.01SP1, 5, 5.01, 5.5, or 6.0 on your PC.

The actual Internet Explorer executable **IEXPLORE.EXE** is not used by PegaREACH, but the display library **SHDOCVW.DLL** is used. The version of this dll provided with any of the aforementioned versions of Internet Explorer is acceptable.

Some version of Internet Explorer is typically installed on every Windows 95 or Windows NT system.

### To determine the version of Internet Explorer on your system:

1. Start Internet Explorer.
2. Select **About** from the **Help** menu. Be careful to choose information about Internet Explorer, not about Windows itself.

**Note:** Installation kits for Internet Explorer are available free from Microsoft's web site and from many other sources. The PegaREACH CD does not provide an installation kit for Internet Explorer.

## Planning Your Installation

Use the checklist below to plan your installation.

- ◆ Make sure your workstation meets the minimum hardware and software requirements described in Chapter 1.
- ◆ Make sure that you have the appropriate privileges to create directories and files on a local drive.
- ◆ Determine which top-level directory should be used or created. The default is **C:\REACH**.
- ◆ Determine which program group (for the Windows Start menu) you want to use. The default is PegaREACH.

When upgrading to 8.1 from a previous release of PegaREACH, locate the existing release's top level directory, and use it during installation. Do not un-install the earlier edition, because that process deletes your preferences and configuration files.

**Caution:** Do not attempt to install or keep two copies of PegaREACH on one workstation, whether it is the same release or different releases.

- ◆ Decide whether to install the User Edition, the Professional Edition, or the Full Edition.

**Note:** Do not install the Full edition for users who are not expected to use Workbench, as this uses additional disk space and other resources. Do not install the Full Edition on Windows 95 or 98 machines.

**Note:** You must de-install the prior release of PegaREACH if you are changing the edition that you wish to install. The PegaREACH 8.1 installation procedure enforces this constraint.

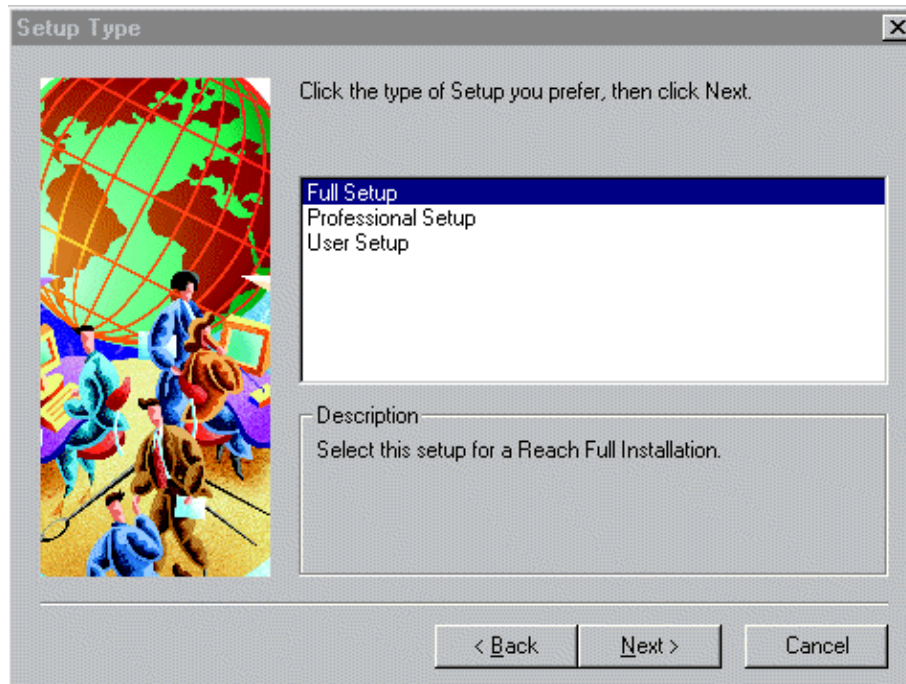
## Running the Setup

### To install PegaREACH 8.1 from the CD:

1. Exit from all other applications, including the MS Office task bar and virus detection software if present.
2. For Windows NT 4, you may sign on as Administrator. If you do not sign on as Administrator, you may receive some security alerts during the file transfer and registration parts of setup.
3. Start the Windows Explorer or File Manager, and navigate to the CD-ROM drive.
4. Double click **D:\SETUP.EXE**

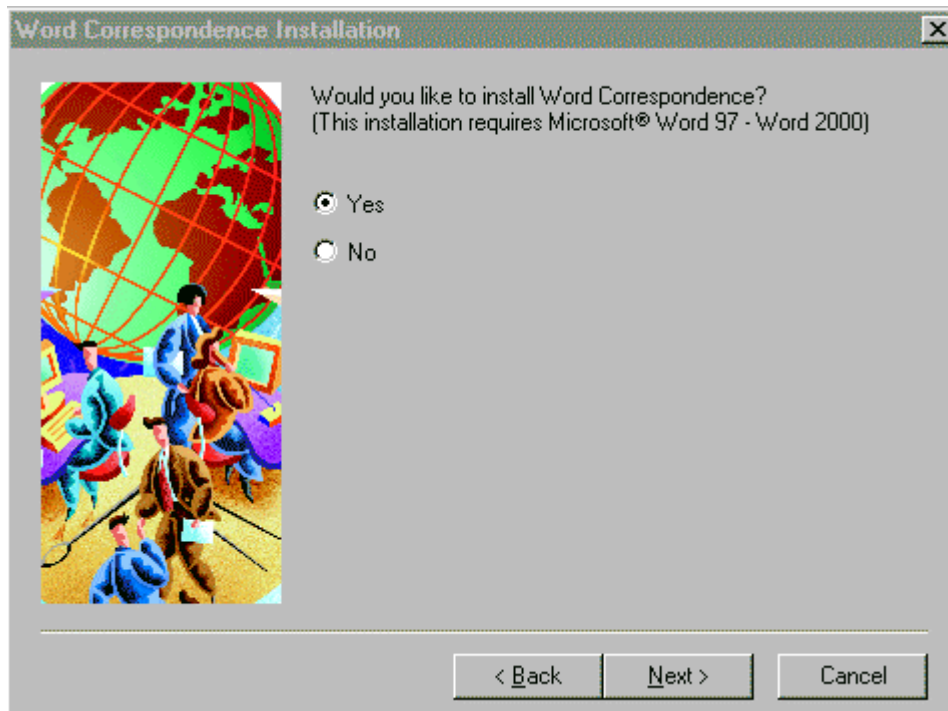


5. Click the Next button. On the next screen, select the Setup type you would like to install. Then click on the **[Next]** button. (Don't select **Full Setup** unless your workstation uses Windows NT.)



6. The next panel asks about the workstation files for Word Correspondence, which works with Microsoft Word 97 and Word 2000. If you would like to install Word Correspondence as an addition to PegaREACH, click on the **[Yes]** button. Otherwise, click on the **[No]** button.

**Note:** If you have problems installing Word Correspondence, see Appendix D.



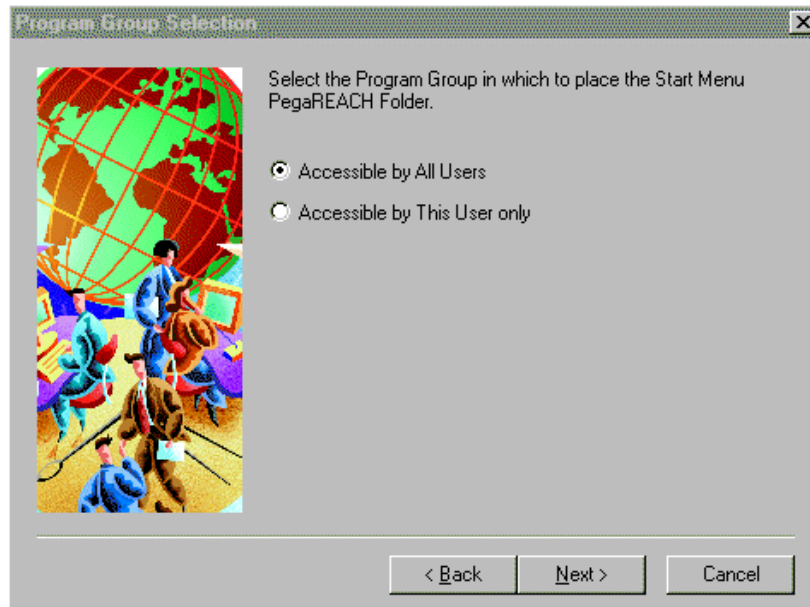
7. If you are installing (not upgrading), select the directory in which to install PegaREACH, (default: **c:\reach**), and click the **[Next]** button. This panel is not displayed if you are upgrading from a previous release. You can choose to:
  - ◆ Accept the default directory, by clicking the button on the left of the screen. Go to step 8.
  - ◆ Choose an existing directory, by selecting the Change Directory button and following the prompts until you return to this screen.
  - ◆ Choose Cancel to exit the setup, with no changes to your workstation.

**Note:** On an installation, you can accept the default directory or choose another existing directory. If the default directory does not exist, it is created.

If you are upgrading, the upgrade process always uses the same directory as was previously used. You can't work with two copies of PegaREACH on one workstation.

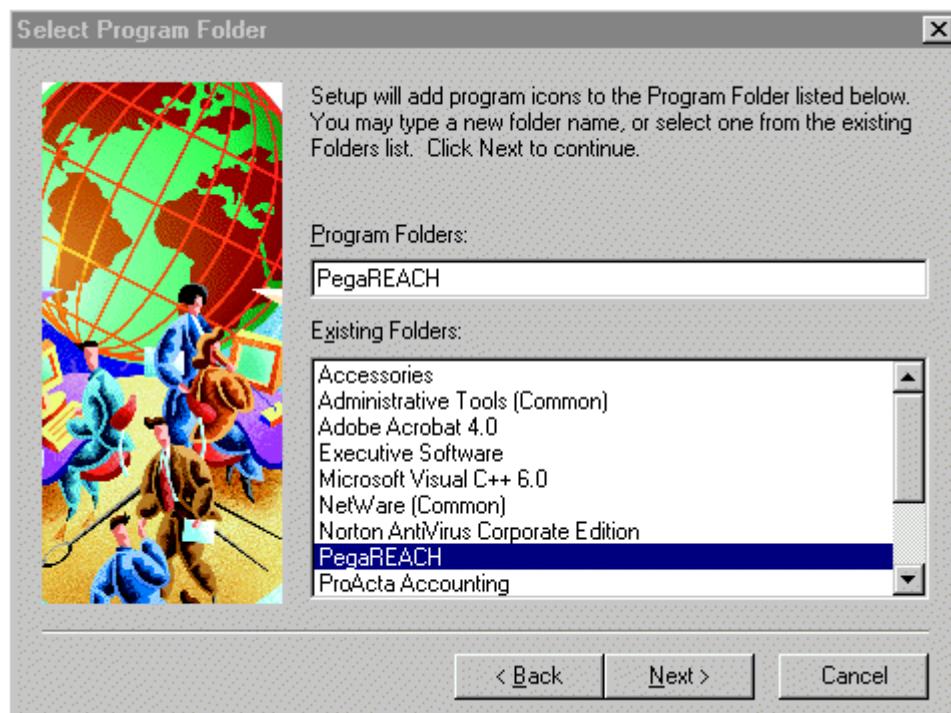


The Program Group panel appears:



8. Windows NT has separate profiles and start menus for separate users, plus a profile and start menu for all users. Determine whether PegaREACH menu items are to appear in the start menu of all users, or only the currently logged in user. (If you are using Windows 95 or 98, this panel doesn't appear).

Click **[Next]** to choose the Program Group.



9. Select the Program Group Folder or enter a new folder name and click **[Next]**. This folder name affects how items are placed in the Windows Start Menu. If upgrading, choose the name used previously to avoid duplication of menu entries. Click **[Next]** to continue.

This causes the file transfers to start and various registration processes to be completed.

10. If you choose **[Cancel]** after you've started copying program files, the files copied so far are deleted and your system is restored to its state before the installation was started.
11. When all the files are copied and registered, a confirmation prompt appears. You have the option to review the **ReadMe.txt** file upon completion. This is the default and it is recommended.
12. Click **[Finish]**. Installation is complete. If you left the option to view the **ReadMe.txt** file, it would then appear in a NotePad window. The **ReadMe.txt** file provides a description of the contents of the Installation CD, and any last minute notifications that you should be aware of. It is recommended that you always review this file after completing an installation.

## Installation Warnings and Tests

The following additional dialogs may appear during installation. They indicate that either your workstation, your operating system, or your selections are not accepted or optimal.

### Windows NT 3.5.1

You can't install PegaREACH onto a workstation running version 3.5.1 of Windows NT.

### Internet Explorer Version

You must have Microsoft Internet Explorer 4, 5, 5.5, or 6.0 on the workstation before installing PegaREACH.

### Administrator Privileges

For Windows NT 4, installation almost always requires administrative privileges. In rare circumstances, you can ignore the warning message and install successfully.

### Windows 95/98 and Full Setup

If you choose a Full Setup on a Windows 95/98 machine, you'll receive a warning message indicating that you should use WindowsNT 4.0. You can continue with the full setup, but Workbench performance is limited and certain Windows resources (known as GDI) may become exhausted after a period of Workbench use. Running other applications simultaneously with Workbench may be unreliable.

## NT Bootstrap Installation

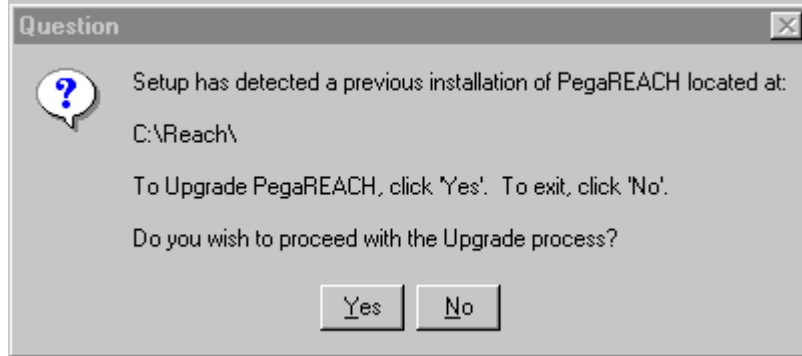
On some older Windows NT systems, installation cannot occur in one step because certain system files are older than the releases used by the Setup program. In such cases, you can “bootstrap” PegaREACH installation by performing it twice:

- ◆ When you receive a message “**Installation requires...**”, click OK. Newer releases of these system files are written. Click OK again to reboot your system.
- ◆ After rebooting, sign on again (as Administrator) and start the installation again.

## Upgrading

You can upgrade to PegaREACH 8.1 from a previous release up to and including PegaREACH 6.6.5 using this CD-ROM. Upgrade is sometimes called "overlay installation".

The installation process searches the Windows registry to locate previous releases of PegaREACH. If found, the following dialog appears:



Press **[Yes]** to upgrade, or **[No]** to end the installation process. You can't upgrade into a directory other than the directory that already contains PegaREACH.

When you upgrade to PegaREACH 8.1 from an older release, your previous configuration files (**CONNECT.INI**, **REACH.INI**, and **\*.PTR** files) are **not** overwritten.

## Creating and Using a Silent Installation File

Often it is desirable to perform an installation or upgrade repetitively, on several machines, with all installation choices and responses made identically across the machines.

At other times, it is desirable to perform the installation through a batch script or command line process, presenting no prompts or dialogs to the user.

The "silent" install uses information in a test file, rather than interactive dialogs, to control a PegaREACH installation or upgrade process. Two steps are involved.

First, you create a silent install control file that contains your responses to dialogs during a first (not silent) installation or upgrade.

The file is named **SETUP.ISS** and is placed in the **C:\Windows** or **C:\WINNT** directory.

To start installation and also create this file, type the following to a command prompt

```
D: /SETUP.EXE -R
```

Then, complete the installation normally.

To use the **SETUP.ISS** file on another machine, copy it into any (local or remote) directory which can be read from the second machine. Sign on to the second machine, insert the CD, and from a command prompt enter:

```
D: /SETUP -F1path/SETUP.ISS -S
```

No spaces should be present after F1 and the path, e.g.

```
-F1J: /SOFTWARE/REACH/SETUP.ISS
```

The installation performed on the first machine is "replayed" silently on the second machine.

**Caution:** All answers made to each dialog during the install that was recorded must be appropriate to the second install.

For example,

- ◆ An ISS file created during Windows NT installation won't work on a Windows 98 system.
- ◆ An ISS file created by recording an upgrade on a workstation that has no earlier copy of PegaREACH won't work.
- ◆ An ISS file created that places all files on an E: drive won't work on a workstation that has no write access to any E drive, and so on.

The silent installation creates a log file (**SETUP.LOG**) in the temporary directory of the destination machine, but deletes it when installation is complete.

Use the **-F2** switch to place the logfile in another directory, assign it another name, or prevent it from being deleted when installation is complete. Place a full path and file name after the switch. For example:

```
SETUP -F1C:\WINNT\SETUP.ISS -F2C:\MYLOGS\RLOG.LOG -S
```

=

## Installation from a Network Drive

You can execute the entire installation from distribution files located on a network directory containing the entire CD-ROM contents. From the command line or Windows NT Explorer, start **SETUP.EXE** on the network directory.

Any log files or temporary files created during installation are stored on the local workstation drive, typically in **C:\WINNT** or **C:\WINDOWS**.

This eliminates the need to pass around a single CD-ROM to perform multiple installations, but still allows individual control over the choices made during installation, if desired.

You can combine a network-source install with a "silent" install procedure.



## Un-installing PegaREACH

It is not necessary to un-install older releases of PegaREACH before upgrading.

If you wish to un-install, make a backup copy of the following configuration files. Once you are done with the installation, you can restore these files over the installation releases:

- **REACH.INI**
- **CONNECT.INI**
- All **\*.PTP** files
- **KBRDRCH.INI** (if you have customized the Professional or User keyboard map)

### To un-install:

1. Exit from all applications.
2. Select **Settings** after pressing the **[Start]** button on the Task Bar.
3. Select **Control Panel**.
4. Double click the **Add/Remove Programs** icon from the Control Panel to start it.
5. Select **PegaREACH** and press **[Add/Remove]** to un-install.

Note: You may need to scroll down to find this entry, and there may be more than one. This indicates how many past PegaREACH installations have occurred, not how many copies reside on your computer.

6. Choose any one of the files and click **[Yes]** to start the un-install process. Ignore any "file not found" messages (they may be numerous).
7. Repeat this process until PegaREACH does not appear on the Un-install list.

Note: You do not need to delete the **C:/REACH** directory, or any of the sub-directories. You can delete **\*.CAC**, **\*.TMP**, and **\*.HTM** files. Do not delete **\*.TXT**, **\*.JPG**, or **\*.GIF** files.

# *Chapter 4*

## *Connections and Signon*

---

Workstation connections can be defined once you have completed the PegaSYSTEM Server configuration described in Chapter 2, and after you installed PegaREACH following the instructions in Chapter 3.

Define connections between PegaREACH and a PegaSYSTEM in the **CONNECT.INI** file using PegaREACH Professional. You need the following:

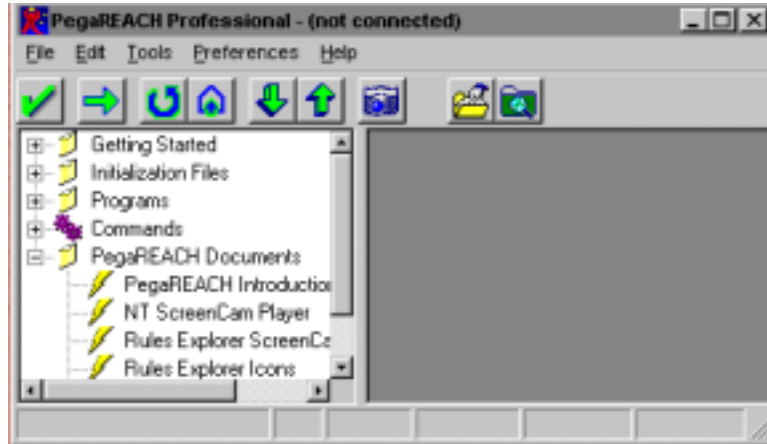
- ◆ A unique Connection ID
- ◆ A text description that you wish to be visible to users during the connection process
- ◆ The network node of the computer that the PegaSYSTEM resides on
- ◆ The TCP/IP port number assigned in the **Preference.INI** file during the ZISK configuration described in Chapter 2.

If only one connection is defined in the **CONNECT.INI** file, you can also configure an Autoconnect feature, so that starting Professional starts the connection process. If more than one connection is defined, users can review and select from the list of available connections after starting Professional.

## Starting PegaREACH Professional

Follow the steps below to start PegaREACH Professional:

- ◆ From the Windows Start menu or your desktop icons, start Professional (module **PRPRO.EXE**). The main window appears:



To complete the installation you must:

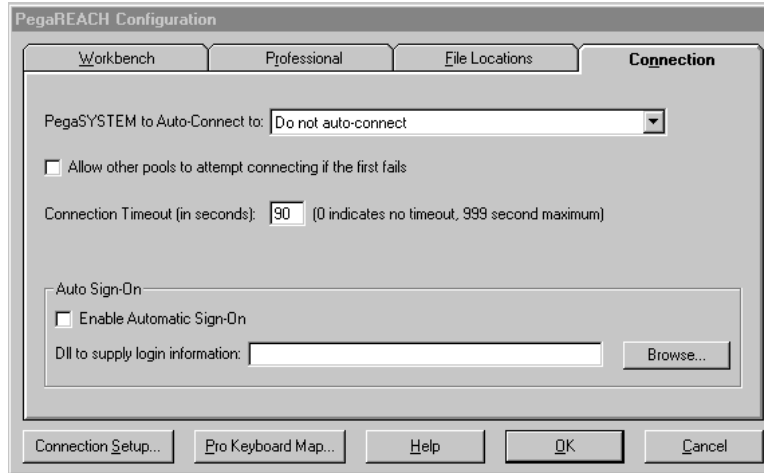
- ◆ Enter the Connection Parameter Information
- ◆ Enter Pool Information
- ◆ Connect and sign-on

## Entering Connection Parameters

PegaREACH uses the Connection Parameter information to connect to the PegaSYSTEM. This information is in your **CONNECT.INI** file.

**Note:** Changes to the **CONNECT.INI** file are effective immediately.

1. Select Configuration from the Preferences menu. The PegaREACH Configuration dialog box appears:



2. Press the Connection Setup button to display the Connection Setup dialog. Your connection list may initially be empty.

The screenshot shows the 'PegaREACH Server Connection Setup' dialog box. At the top, the 'Connection file:' field contains 'C:\Reach\Connect.ini'. Below this is the 'Connection List' section, which contains a list of connection IDs: WCLIENTNT, SERVE, PEGSUJ, SDEVBYSN, SPEGWHS, and SHELPNT. To the left of the list are up and down arrow buttons. Below the list are 'New ID' and 'Delete ID' buttons. The 'Connection Information' section includes fields for Name, Description, Node name, and Port number. There is a checkbox for 'Enable password encryption (for pre-7.1 only)'. Below that is a field for 'GDOO to run on STOP:'. At the bottom of this section is a checkbox for 'Use for Mobile Processing' and a 'Browse...' button. The 'DII Path:' field is at the bottom of the dialog. At the very bottom are buttons for 'OK', 'Cancel', 'Help', and 'Pool Creation -->'.

### To add a connection:

1. Click the New ID button.
2. Enter a unique connection name of up to 12 alphanumeric characters. The value you choose is arbitrary and need not correspond to any other configuration element.

3. Enter a text description that distinguishes this PegaSYSTEM from others.
4. Enter the node name (the network name of the computer).
5. Enter the TCP/IP port number (up to five digits) that was assigned for PegaREACH communication during the ZISK agent configuration in Chapter 2. This is not an Internet or IP address.
6. Click on **[OK]** to save your work in a revised **CONNECT . INI** file.

**To delete a connection:**

1. Highlight the Connection ID.
2. Click the **[Delete ID]** button.

**To alter any of these settings:**

1. Select a Connection from the Connection List. The connection information appears in the lower portion of the dialog box.
2. Modify the information as necessary and press **[OK]**.

## Entering Pool Information

This step is optional. Pool connection information can be set up at any time. You use a pool connection when you want PegaREACH to attempt to connect to a series of PegaSYSTEMs in sequence. It typically is used to connect to any one of multiple satellites of one Central Server.

See the topic entitled Professional Configuration Preferences - Understanding Weights and Pools in the PegaREACH Professional help file (**PROHELP.CHM**).

## Connect and Sign On

### To start PegaREACH:

1. Select the Start button on the Task Bar.
2. Choose Programs.
3. Choose PegaREACH. This starts the program=**PRPRO.EXE**, which starts the communications program **PRCOMM.EXE**. The PegaREACH Professional main window appears with the phrase "(not connected)" in the window title.

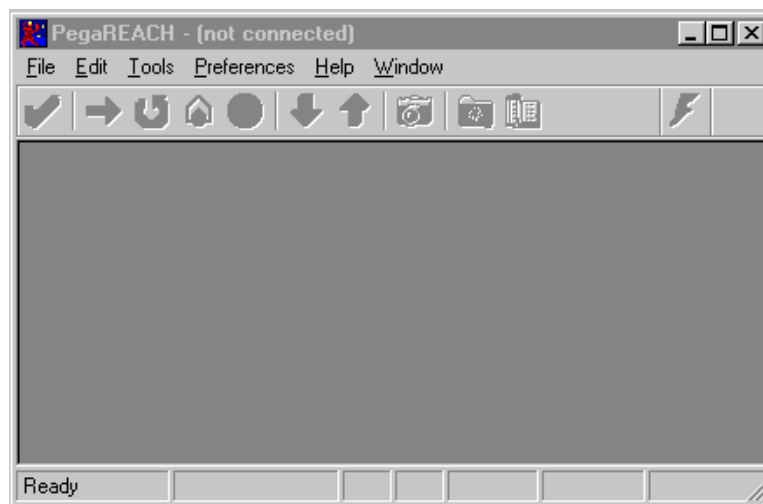


Figure 4-1: Professional Main Window

4. From the File menu, select **Open**. The Select a Connection dialog box appears (Figure 4-2).



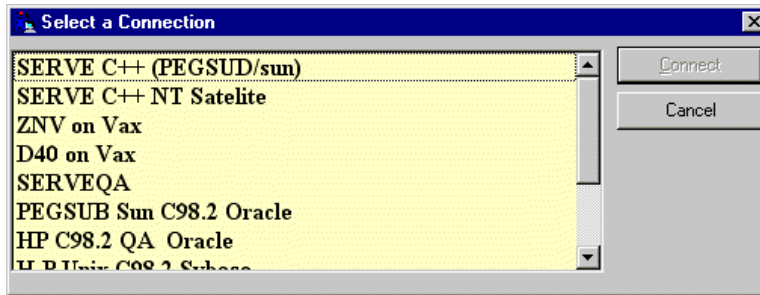


Figure 4-2: Connection List

5. Highlight one row in the list and select the **[Connect]** button.

After a delay of a few seconds, the signon screen appears from the PegaSYSTEM. You are connected, but not signed on.

The signon screen may vary from the “typical” signon screen if an authored GMENU has been configured.

If the **DDD\_PREFERENCE.INI** script for PegaREACH, discussed in Chapter 3, includes the **/z zxc** switch, you can connect to a PegaSYSTEM that is not “up,” as long as the both the Lock Manager and **ZISK** agent are running.

In an ordinary production setting, you should connect only to a PegaSYSTEM that is “up”. A PegaSYSTEM is up if it has these two processes running, plus the control process, plus the numerous other agent processes.

## Starting PegaREACH

User workstations should be configured (through the REACH.INI file) to AutoConnect to a particular PegaSYSTEM or pool. That way, when the user starts the PRPRO.EXE program, it automatically attempts the connection(s). See the topic entitled Professional Configuration Preferences - Connection Tab for more information.

PegaREACH Professional and Full Edition users can start PegaREACH by auto-connecting or by using the File Menu and choosing Open to select a connection from a list of options.

To start Workbench, start PegaREACH Professional and press the **F12** function key. You can also start Workbench by running the PRWBENCH.EXE program.

## Run Time Operations

With PegaREACH running and connected to a PegaSYSTEM, the **PRPRO.EXE** provides communications. **PRPRO.EXE** communicates with the PegaSYSTEM using Winsock-based TCP/IP communications.

When you start Workbench, a second executable module **PRWBENCH.EXE** communicates with the PegaSYSTEM.

**PRWBENCH.EXE** communicates with **PRPRO.EXE** using Microsoft OLE automation.

Execution of PegaREACH creates numerous small temporary files on the user's local disk. All permanent and valuable business data resides only on the PegaSYSTEM.

The user's Explorer files (with a PTR file type), preferences files (**INI** file type) and other "personal" data such as the Scratch Pad (**TXT** file type) are also retained (only) on the local PC.

## Interacting with Internet Explorer

PegaREACH/Professional uses an HTML rendering “engine” built into Microsoft’s Internet Explorer, version 4, which is sometimes identified as MSIE.

**Note:** This does not mean that PegaREACH users must use MSIE as your default Internet or Intranet browser. You can use Netscape’s browser (Netscape Navigator or Communicator) or others.

It does mean that MSIE must be installed and registered on your system before PegaREACH/Professional is installed, and that certain preferences you set when using MSIE may affect how PegaREACH looks and works.

The initial values of most Internet Explorer 4 preferences are acceptable without modification.

### To review or change preferences:

1. Start Internet Explorer version 4.01SP1, version 5 or version 5.5.
2. Select Internet Options from the Views menu.

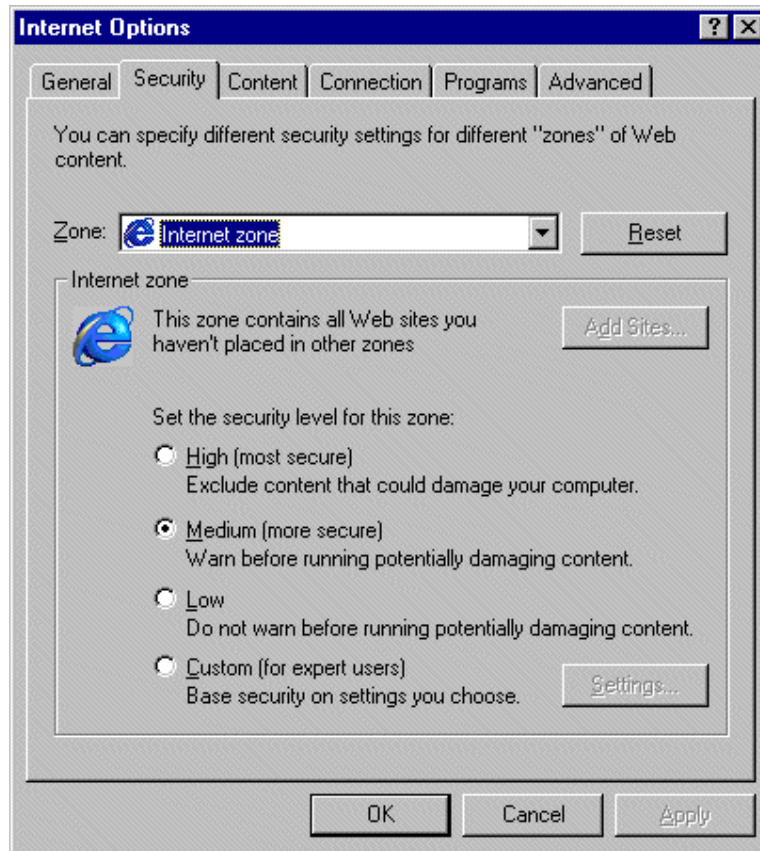


Figure 4-3. Internet Options Selection Dialog Box

3. Set the security level to Medium for all “zones” except the Restricted Sites zone, which can be set to High if desired.
4. You can set the security level for the Restricted Zone to High if desired.
5. Press **[OK]**.

# *Appendix A*

## *File List*

---

This appendix documents the workstation files shipped or used with PegaREACH. The files are shown according to the following categories:

- ◆ Temporary files
- ◆ Executable programs
- ◆ PegaREACH program libraries
- ◆ Microsoft and other vendor files
- ◆ PegaREACH ActiveX controls
- ◆ Third party ActiveX controls
- ◆ Text, PTR, and help files
- ◆ Image files
- ◆ Conversion Utility Files

- ◆ Java Class Files
- ◆ Obsolete Files
- ◆ Word Correspondence Files

## Temporary Files

PegaREACH (User and Professional) creates temporary files in the **C:\TEMP\reachtmp** directory, with a file name of **ZFHxxxxx** and a file type of **HTM**. You can change the directory by modifying your **REACH.INI** file. These temporary files contain the HTML source text for Professional pages in the Session Panel.

Workbench creates temporary files of type **TXT**, also in the **Wycbj myeÉ~ÅÜí ãé** directory. These contain the text messages sent between the PC and the PegaSYSTEM.

You can delete these files anytime that PegaREACH is not running, but the total space consumed by these files is small.

These files don't contain any passwords.

To change the directory from **C:\TEMP\reachtmp** to another directory, modify your **REACH.INI** file. Add a line to the **[PegaREACH]** section that reads **TempDir = C:\new name**.



## Executable Programs

The **.EXE** file type identifies executable (main) programs. The list below includes Pegasystems-produced, Microsoft, and third-party produced main programs. For more information, see the help file topic entitled [PegaREACH Installation Files - Executable Programs](#).

Module	Description
<b>GSW32.EXE</b>	This program is part of the Pinnacle BPS Graph Control. It supports Bits Per Second Ltd graphing.
<b>HHUPD.EXE</b>	This program is a Microsoft utility to install or upgrade HH.EXE, the HTML Help display engine, and its components. It is not needed after installation of HH.EXE.
<b>HRCHLIST.EXE</b>	This is an alternate utility to display reachlists using HTML. It is currently under development and is intended for PegaSYSTEMs use on certain advanced development projects. A more complete and fully documented version will be provided in an upcoming release.
<b>PEGALOG.EXE</b>	This program is the PegaREACH Log Analyzer. It is a standalone program that can be started from the Tools Menu in PegaREACH Professional.
<b>PEGAMOVE.EXE</b>	This program is the PegaMove facility that can be activated from the PegaREACH Workbench File Menu.
<b>PMEXPLORE.EXE</b>	This program is used with PegaMove. It is the Briefcase Explorer Executable. It helps users find files stored in briefcases (.move files).
<b>PRCOMM16.EXE</b>	The PegaREACH Log Analyzer and other programs use PRCOMM16.EXE to perform Windows bitmap printing of forms. PRCOMM16.EXE creates a splash screen and keeps track of GDI resources.
<b>PRGQUA.EXE</b>	This program is used to provide a 1997 ReachList display. It is derogated.
<b>PRFLDHLP.EXE</b>	This program is a PegaREACH Professional applet that provides a List Help display from HTML forms. It replaces PRSERVE.EXE.

---

<b>PRPLIST.EXE</b>	This program runs ReachLists.
<b>PRPRO.EXE</b>	PRPRO.EXE is the User and Professional main program.
<b>PRWBENCH.EXE</b>	PRWBENCH.EXE is the PegaREACH Workbench main program
<b>WIZLIST.EXE</b>	This is the Menu Wizard accessed from the GMENU form.

---

## PegaREACH Program Libraries

The PegaREACH program libraries are listed in the following table. For more information, see the help file topic entitled [PegaREACH Installation Files - Libraries](#).

Library	Description
<b>CHKPOINT.DLL</b>	An applet that can download and upload clipboard pages. For more information, see the help file topic titled <a href="#">GVB Command - Move Clipboard Pages from one PegaSYSTEM to another PegaSYSTEM</a> .
<b>CLIPBRD.DLL</b>	Clipboard review applet library. Start this applet by using the toolbar clipboard tool.
<b>EDITTAG.DLL</b>	Applet for GEDT command configuration support. Start this applet by entering HELP/@GEDT.
<b>FRAMEWIZ.DLL</b>	Supports creation of HTML frames. Start this applet from the PegaREACH Workbench Tools Menu.
<b>GQUERYED.DLL</b>	GQUERY editor applet.
<b>IPRIGEN.DLL</b>	Applet for IPRIGEN rule file.
<b>OBJED.DLL</b>	An editor used to represent clipboard data in an object-oriented manner.
<b>PEGAEDIS.DLL</b>	Applet supporting some EDIS and ECNL command capabilities. (Used only in-house at Pegasystems.)
<b>PEGAEMAI.DLL</b>	Applet supporting some EWRKcommand capabilities. (Used only in-house at Pegasystems.)
<b>PEGAFLOW.DLL</b>	Visio interface from the Workflow Charter in PegaREACH.
<b>PEGPCOUT.DLL</b>	Supports the 98.X ?PAL action alert dialog.
<b>PRCHART.DLL</b>	This applet is for PegaChart, which graphs numeric data generated by a report.  After configuring the appropriate GRFIELDS and GCLIPMAP records, use the GVB command to run PegaChart.

---

<b>Library</b>	<b>Description</b>
<b>PRCOMM.DLL</b>	PRCOMM.DLL provides TCP/IP and Winsock communications support.
<b>PRDNLOAD.DLL</b>	This provides report download support, and the ability to export reports to Microsoft Excel.
<b>PRSECUR.DLL</b>	This applet lets users modify security groups.  Access the applet from the Tools Menu in PegaREACH Workbench. This is a replacement of SECURITY.DLL.
<b>PRINTDIB.DLL</b>	This DLL is called by PRCOMM16.EXE. It prints windows as Windows bitmap images.
<b>PRPJCNST.DLL</b>	This applet is for project tracking settings.
<b>PRREPORTER.DLL</b>	This applet runs reports and underlies PegaList and PegaTree.
<b>PRSYSEVENTS.DLL</b>	This applet supports system events.
<b>PRWEB.DLL</b>	This applet supports User Edition safe-guarding.
<b>PZPM.DLL</b>	Performance monitoring support.
<b>REPORTWIZ.DLL</b>	This is the Report Definition Wizard.
<b>UPDGMENU.DLL</b>	GMENU rule file support.
<b>WFWIZARD.DLL</b>	This is the Workflow Wizard Applet.
<b>YMMVIEW.DLL</b>	Utility routines for memory management.
<b>YUT32.DLL</b>	Utility routine library.

---

## Microsoft and Other Vendor Files

These non-PegaSYSTEM files are included in the installation. They are placed in a Windows system directory during installation of the Internet Explorer or of PegaREACH, if not already there. The PegaREACH installation does not overwrite existing files.

File	Description
<b>COMCAT.DLL</b>	Microsoft Common Dialog library.
<b>FM20.DLL</b>	Microsoft Forms support library.
<b>FM20ENU.DLL</b>	Microsoft Forms support library.
<b>GRDKRN32.DLL</b>	Apex Software Corporation True DB Grid.
<b>GSWDLL32.DLL</b>	Bits Per Second Ltd support library
<b>MFC40.DLL</b>	Microsoft Visual C++ foundation class library.
<b>MFC42.DLL</b>	Microsoft Visual C++ foundation class library. (Installed in the Reach directory).
<b>MSVBVM50.DLL</b>	Microsoft Visual Basic 5.0 virtual machine.
<b>MSVCRT.DLL</b>	Microsoft Visual C++ runtime library
<b>MSVCRT40.DLL</b>	Microsoft (R) C Runtime Library Forwarder DLL
<b>RICHE32.DLL</b>	Windows 95 Rich Text Edit Control
<b>SSFM1032.DLL</b>	Sheridan Calendar Control Support Library
<b>SSMEDT32.DLL</b>	Sheridan Masked Edit Interface Library
<b>SSSPRN32.DLL</b>	Sheridan Print support library

## PegaREACH ActiveX Controls

These **OCX** files provide ActiveX controls. Some of these can be embedded into HTML displayed by Professional and User Editions. Others are more useful in Visual Basic applets, created with the Reach Development Kit. For more information, see the help file topic entitled [PegaREACH Installation Files - ActiveX Controls](#).

OCX File	Description
<b>PEGAAGG.OCX</b>	This control supports limited types of aggregations in HTML forms. See the help file topic entitled <a href="#">Displaying Reports Used to Aggregate Columns of Data</a> .
<b>PEGACLIP.OCX</b>	This control supports clipboard page display. It is used in prwbench.exe, wizlist.exe, wfwizard.dll, reportwiz.dll, and chkpoint.dll.
<b>PEGALIST.OCX</b>	This control supports PegaList and PegaTree displays. See the help file topics entitled <a href="#">PegaList Topics</a> and <a href="#">PegaTree Topics</a> .
<b>PEGATEXT.OCX</b>	This is a group of basic controls for the Reach Development Kit. It includes PegaForm, PegaText, PegaCheck, PegaCombo, PegaOption, PegaPad, PegaRow, and the PegaLines controls.
<b>PEGAUPDT.OCX</b>	This control submits commands to the PegaSYSTEM. It is used by both PegaREACH Professional and PegaREACH Workbench.
<b>PEGAZOOM.OCX</b>	This is the Workbench Zoom control. On many Workbench forms, there is a choice between Row View and Grid View. The Row View is called the Zoom control.
<b>PRCOMBO.OCX</b>	PRCOMBO.OCX is a special combo box control. The list section can have two parts. This control is included in the GDOORULE Workbench form.
<b>PRTEXT.OCX</b>	This is a text box used on a web page to start programs. The List Help support control is an example of PRTEXT.OCX. See the help file topic

---

<b>RWEBLIST.OCX</b>	entitled <u>GMENU - Understanding the PegaREACH List Help Applet</u> . RWEBLIST.OCX is a control used in PegaREACH Professional. It is a web implementation of the PegaList controls. It is also packaged in a cabinet as RWEBLIST.CAB.
---------------------	--

---

## Third-party ActiveX Controls

Microsoft and other software companies provide these ActiveX controls.

OCX File	Description
<b>COMCT332.OCX</b>	Microsoft Windows Common controls — 3D.
<b>COMCTL32.OCX</b>	Microsoft Windows Common controls — non-3D.
<b>COMDLG32.OCX</b>	Microsoft Windows common dialog control.
<b>GRAPH32.OCX</b>	Bits Per Second Ltd graphing control.
<b>HHCTRL.OCX</b>	Microsoft HTML Help display engine.control.
<b>MSWINSCK.OCX</b>	Microsoft Winsock control.
<b>RICHTX32.OCX</b>	Microsoft Rich Text control.
<b>SPIN32.OCX</b>	Outrider Systems Inc spin button control.
<b>SSCALA32.OCX</b>	Sheridan Software Inc. Calendar Widget control. (Installed in the reach directory)
<b>SSDW3B32.OCX</b>	Sheridan Data Widgets OCX - DataGrid/Combo/DropDown Control.
<b>TABCTL32.OCX</b>	Microsoft control for file tabs.
<b>TDBG32.OCX</b>	Apex Software Grid control.
<b>THREED32.OCX</b>	Sheridan Software 3-D controls (distributed through Microsoft Visual Basic).
<b>VCF15.OCX</b>	Visual Components Inc. Formula One control.



## Help, INI, Text, PTR, and Other Files

### Help Files

The CHM file type identifies a help file in Microsoft's HTML Help format. These are displayed by the Microsoft help viewer **HH.EXE**, which calls on **HHCTRL.OCX** and **SHDOWVW.DLL**.

The help viewer is not installed with PegaREACH, but version 1.1 of the help viewer is installed with MSIE 4. To install version 1.2 of the help viewer, you can double click on the self-extracting executable **HHUPD.EXE** from Microsoft. A recent version of this file is installed but not executed with PegaREACH. (On Windows NT, sign on as Administrator before executing **HHUPD.EXE**.)

Both the older 1.1 version and the new 1.2 version of **HH.EXE** can work with these three **\*.CHM** files.

CHM File	Description
<b>PROHELP.CHM</b>	HTML Help File for Professional Edition.
<b>IOS.CHM</b>	HTML Help File for ImageNet Output Server.
<b>WBHELP.CHM</b>	HTML Help File for PegaSYSTEM configuration.
<b>WORKBENCH.CHM</b>	HTML Help File for PegaREACH Workbench.
<b>PEGAWEB.CHM</b>	HTML Help File for PegaWEB
<b>ARCHIVE.CHM</b>	HTML Help File for PegaSEARCH
<b>OBSOLETE.CHM</b>	HTML Help File that describes obsolete facilities.

## INI and TXT files

For more information about these files, see the help file topic entitled [PegaREACH Dynamic Files](#) and [PegaREACH Installation Files - Text, PTR, JavaScript and Other](#).

File	Description
<b>CONNECT.INI</b>	Defines PegaSYSTEM connections. Maintained through the Connections dialog of the Preferences menu, Configuration menu item. Do not edit with a text editor.
<b>GRIDCONF.TXT</b>	Records ReachList column widths, which are personal settings. Created again if deleted.
<b>HISTORY.TXT</b>	Supports the previous command display in the Action Completer.
<b>PEGAEDIT.JS</b>	JavaScript local editing support.
<b>PEGASAFE.REG</b>	Registration file for Pega Controls.
<b>PRCOMM16.REG</b>	Registration file for prcomm16.exe.
<b>PRGRID.LPK</b>	An Active X license package for the PRGRID control, which embeds the Sheridan grid control. Without it, the PRGRID control would not work on HTML forms or WEB pages.
<b>REACH.INI</b>	Preferences file, records many of the values set through the Configuration dialogs of the Preferences menu. May be edited with a text editor in unusual situations. See Appendix B.
<b>REPORT.CAC</b>	Holds cached ReachLists.
<b>RWEBLIST.CAB</b>	Provided with RWEBLIST.OCX
<b>RWEBLIST.DDF</b>	For Workbench HTML forms
<b>RWEBLIST.HTM</b>	Provided with RWEBLIST.OCX

---

<b>File</b>	<b>Description</b>
<b>RWEBLIST.INF</b>	Provided with RWEBLIST.OCX
<b>SSN-SCRIPTLET1.HTM</b>	Scriptlet for PegaREACH demo.
<b>SSN-SCRIPTLET2.HTM</b>	Scriptlet for PegaREACH demo.
<b>STYLE.TFT</b>	Style sheets used by Menu Wizard.
<b>TABSTRIP.CSS</b>	For Workbench HTML forms.
<b>TABSTRIP.JS</b>	For Workbench HTML forms.
<b>TEMP.VSD</b>	Visio template.
<b>TEMP.VSD</b>	Visio template.
<b>TMPLAT45.VSD</b>	Visio template for version 4.5.
<b>TMPLAT50.VSD</b>	Visio template for version 5.0.
<b>UDDMETA.TXP</b>	Supports list help (F1 key) displays in Workbench.
<b>YPDHELP.TXP</b>	Provides prompts for command parameters when the commands are entered into the Action Wizard and into the GDOORULE form.
<b>ZDBLFDEF.HTM</b>	Workbench HTML form for YDBLFDEF rule file.

---

## PTR and PTP Files

These support Explorer panel and Professional or User Edition Menu customization. Initially shipped with **PTP** rather than **PTR** file type.

Pegasystems reserves the right to overwrite **PTP** files. Pegasystems will not overwrite **PTR** files.

File	Description
<b>EXPLORERHELP . PTP</b>	Holds information for the PegaREACH Explorer Panels.
<b>INITIAL . PTR</b>	Template for PTR files. When a user adds a new session, INITIAL.PTR creates PTR files for the Explorer Panels for that session.
<b>PEGALINK . PTP</b>	For use with PegaCONNECT.
<b>PEGATREE . PTP</b>	Holds information for the PegaREACH Workbench Explorer Panel. It is saved in the Reach directory.
<b>PEGATREE . PTR</b>	This file reads in PEGATREE.PTP. It is an include file. It is saved in each session directory.
<b>PRCMND . PTP</b>	Supports Action Wizard.
<b>PRPRO . PTP</b>	Supports Professional Explorer panel.
<b>RCHMENU . PTP</b>	Defines custom Professional and User edition menu. Can be edited with NotePad and invoked through an appropriate <i>GACEDATA</i> keyword.
<b>RCHMENU . PTR</b>	Defines custom PegaREACH Professional and User Edition menus.
<b>WBCMND . PTR</b>	Supports Workbench Explorer panel.
<b>XXFAVS . PTR</b>	Supports Action Wizard, Favorites tab.
<b>XXLIKELY . PTR</b>	Supports Workbench Explorer panel, Likely tab.

File	Description
<b>XXSITE.PTR</b>	Supports Action Wizard, Site tab.

## Image Files

The embedded HTML display engine in Professional Edition, based on the Microsoft Internet Explorer (MSIE) version 3, supports image files of type BMP (Windows bitmap), GIF (CompuServe Graphic Interchange format) and JPG (Joint Photography Experts Group). If your copy of MSIE has been enhanced with the appropriate additional Internet ActiveX controls, other file formats such as AVI will also be supported in Professional Edition.

These files can be stored in the directory in which Professional Edition executes (determined by how **PRPRO.EXE** is started), but it is typically convenient to store them centrally in a directory on a network drive.

A preference (**REACHHome** value ) in the **REACH.INI** file instructs Professional Edition where the images are to be found.

For more information, see the help file topic entitled [PegaREACH Installation Files - Images](#).

---

### File

---

**BLU\_BDS.GIF**  
**BLUERULE.GIF**  
**CUST.GIF**  
**ERRORX.GIF**  
**FALSE.GIF**  
**HEAD.GIF**  
**HEAD2.GIF**  
**IMAGE19.GIF**  
**IMAGE20.GIF**  
**IMAGE21.GIF**  
**IMAGE22.GIF**  
**IMAGEMAP.GIF**  
**PIC.GIF**  
**REDFLAG.GIF**

---

---

**File**

---

**RULE4.GIF**

**TRUE.GIF**

**WORLD4.GIF**

---

## Conversion Utility Files

The following files are used to upgrade your PegaSYSTEM for use with PegaREACH 8.1.

File	Description
<b>PRDEMO_PRDEMO.move</b>	Originally provided with PegaREACH 6.6. Used to prepare host PegaSYSTEM for running the PegaREACH demo.
<b>RECORDS FOR 98.1 S.move</b>	Originally provided with PegaREACH 6.6 to prepare a 98.1 PegaSYSTEM for use with PegaREACH 6.6. Apply this move file to a 98.1 PegaSYSTEM if you have not already done so earlier.
<b>DEFQUERY.TXT</b>	Used in preparing a 7.1 PegaSYSTEM for use by PegaREACH 8.1. See Appendix C of this document.
<b>Object_r.move</b>	Used in preparing a 7.1 PegaSYSTEM for use by PegaREACH 8.1. See Appendix C of this document.
<b>OBJECT_S72FIX.move</b>	Used in preparing a 7.1 PegaSYSTEM for use by PegaREACH 8.1. See Appendix C of this document.



## Java Class Files

These files are used by iTable, a Java applet included in PegaREACH 8.1

<b>File</b>	<b>Description</b>
<b>flapApplet.class</b>	iTable
<b>flapTable\$Renderer.class</b>	iTable
<b>flapTable.class</b>	iTable
<b>fphover.class</b>	For PegaREACH demo
<b>Fphoverx.class</b>	For PegaREACH demo
<b>Reports.class</b>	iTable
<b>tableData.class</b>	iTable
<b>tableMethods.class</b>	iTable

Consult the help files for more information on configuring iTables. Additional documentation on iTable is available in the **\Docs** folder of the PegaREACH 8.1 Installation CD.

## Obsolete Files

The following files were included in PegaREACH 6.6.x but have been dropped from PegaREACH 7.2 and higher.

---

File
------

<b>Prtables.dll</b>
---------------------

<b>Proutl.ocx</b>
-------------------

<b>Qitm.dll</b>
-----------------

<b>Qoper.dll</b>
------------------

<b>Qrole.dll</b>
------------------

---

## Word Correspondence Files

The following files are included to be used with Word Correspondence:

File	Description
<b>Corrrep32.dll</b>	Located in WinSysDir (e.g. c:\winnt\system32)
<b>Corredit32.dll</b>	Located in WinSysDir (e.g. C:\winnt\system32)
<b>Corrgen32.dll</b>	Located in WinSysDir (e.g. c:\winnt\system32)
<b>Corrgflm32.dll</b>	Located in WinSysDir (e.g. c:\winnt\system32)
<b>Corrdisp32.dll</b>	Located in WinSysDir (e.g. c:\winnt\system32)
<b>Gflm32.tlb</b>	Located in the winnt directory
<b>Crep32.tlb</b>	Located in the winnt directory
<b>Cgen32.tlb</b>	Located in the winnt directory
<b>Corr.ini</b>	Located in the winnt directory
<b>Corr.dot</b>	Located in the Word startup directory (e.g. C:\Program Files\Microsoft Office\Office\STARTUP)

# *Appendix B*

## *REACH.INI Preferences*

---

The **REACH.INI** file is maintained as you use PegaREACH. Do not edit this file unless instructed by Pegasystems staff. This file contains numerous preferences, organized into sections that are created and revised as you use PegaREACH.

Like most INI files used with Windows applications, lines in this file are organized into sections, identified by square brackets. The order of lines within a section is not significant.

The following list is for reference only.

## [PegaREACH] Section

These preferences govern the Professional and User editions, except as noted.

Keyword	Values or Description
<b>AutoConnect</b>	Identifies a PegaSYSTEM connection within the <b>CONNECT.INI</b> file that Professional should attempt to connect to whenever Professional Edition is started.  If this line is missing or has <b>AutoConnect=NONE</b> , then no automatic connection is attempted at startup.
<b>AutoToPool</b>	<b>1</b> means that if all attempted connections in one connection pool have timed out, Professional continues to attempt to connect to other satellites in a second pool, etc.  <b>0</b> indicates no further attempts to connect after the first pool is exhausted.
<b>Caption</b>	Identifies the caption that appears in the PegaREACH title bar.
<b>ChainPools</b>	Identifies a path and filename to a web browser program, such as Microsoft's Internet Explorer (usually <b>IEXPLORE.EXE</b> ) or Netscape's Navigator or Communicator. Set in the <b>Preferences</b> menu. Used in Workbench <i>GMENU</i> rule form, <b>[Preview]</b> button.
<b>HelpHome</b>	Identifies a path (not a file name) in which the CHM files (HTML Help files) are to be found. These files need not be in the same directory as other PegaREACH files.
<b>HTMLBrowser</b>	Identifies a web browser used in the Preview function of <i>GMENU</i> open authoring.
<b>JavaDirectory</b>	Identifies a path (not a file name) to a directory where Java files are to be stored.
<b>KeyMap File</b>	Identifies a path and filename containing the Professional Keyboard Map. Usually this is

Keyword	Values or Description
	<p>named <b>KBRDRCH.INI</b>. The keyboard map can be changed from the Preferences menu. (The keyboard map of Workbench is fixed and cannot be changed. It is not affected by changes to the Professional keyboard map).</p>
<b>OpenAuthorDirectory</b>	<p>Identifies a path (not a file name) to a directory where open authored files are to be stored.</p>
<b>ReachHome</b>	<p>A path (not a file name) identifying where files referenced in GMENU forms are to be found.</p>
	<p>If not specified, Professional Edition expects to find these files in the working directory, typically <b>C:\REACH</b>.</p> <p>Set this path through the <b>File Locations</b> tab on the Professional Editions <b>Tools</b> menu, <b>Configurations</b> menu item.</p>
<b>ReachSource</b>	<p>A path (not a file name) that is a source for <b>ReachHome</b>. If a file that is referenced in a GMENU form isn't found in <b>ReachHome</b>, PegaREACH looks in the <b>ReachSource</b> directory. If the file is found, PegaREACH copies the file to the <b>ReachHome</b> directory.</p>
<b>TempDir</b>	<p>Optional: To change the directory for temporary files from <b>C:\Reach</b> to something else, add a row for the temporary directory.</p> <p>For example,</p> <p><b>TempDir = C:\Temp\Reachtmp</b></p>
<b>Timeout</b>	<p>A number of seconds, after which connection attempts time out if no response is received from the PegaSYSTEM</p>

Table B-1. REACH Section Preferences

## [REACHSizing] Section

These lines record the position and state of the Professional Edition main window. Positions and size measurements are in units of twips. A twip is a fraction of a pixel. These values should all be non-negative integers.

Keyword	Description
<b>ActionWizard</b>	1 to use the Action Wizard 0 to use the Action Completer
<b>DeleteButtonCache</b>	1 to delete the button cache 0 to keep the button cache  For more information, use the help file ( <b>PROHELP.CHM</b> ). The topic title is <u>PegaREACH Professional Basics - Choosing Your Preferences, Delete HTML Cache Files on Signoff</u>
<b>DeleteHTMLCache</b>	1 to delete the HTML cache 0 to keep the HTML cache  For more information, use the help file ( <b>PROHELP.CHM</b> ). The topic title is <u>PegaREACH Professional Basics - Choosing Your Preferences, Delete HTML Cache Files on Signoff</u>
<b>DeleteToolbarCache</b>	1 to delete the toolbar cache 0 to keep the toolbar cache  For more information, use the help file ( <b>PROHELP.CHM</b> ). The topic title is <u>PegaREACH Professional Basics - Choosing Your Preferences, Delete Toolbar Cache Files on signoff</u>
<b>ExplorerPanelVisible</b>	1 to keep the Explorer Panel visible 0 to make the Explorer Panel invisible
<b>FormHeight</b>	Main window height
<b>FormLeft</b>	Left edge of main window

<b>Keyword</b>	<b>Description</b>
<b>FormTop</b>	Top edge of main window
<b>FormWidth</b>	Main window width
<b>MDIFrameState</b>	This reflects the size of the entire PegaREACH display. It can either be maximized or normal.  0 = normal 2 = maximized
<b>PanelWidth</b>	Width of (Professional) Explorer Panel
<b>ReachToForefront</b>	1 to keep PegaREACH screens in front of other windows  0 if PegaREACH screens can appear behind other windows or be minimized
<b>SaveSettings</b>	1 if the state (which nodes are expanded, etc) of the Explorer Panel is to be saved when exiting PegaREACH  0 if the Explorer Panel is to be initially collapsed when PegaREACH starts.
<b>ShowExitWarning</b>	1 to show exit warning  0 to hide exit warnings  For more information, use the Help File (PROHELP.CHM). The topic title is: <u>Professional Configuration Preferences - Workbench Tab.</u>
<b>ShowTiming</b>	1 to show timing  0 to hide timing
<b>StatusBarVisible</b>	1 if the status bar is to be visible  0 if the status bar is to be omitted from the main window
<b>ToolBarVisible</b>	1 if the toolbar is to be visible  0 if the toolbar is to be omitted from the main window

Table B-2. REACH Sizing Section



## [Workbench Sizing] Section

These lines record the position and state of the Workbench Edition main window. Positions and size measurements are in units of twips. A twip is a fraction of a pixel.

Keyword	Description
<b>FormHeight</b>	Main window height
<b>FormWidth</b>	Main window width
<b>FormTop</b>	Top edge of main window
<b>FormLeft</b>	Left edge of main window
<b>PanelWidth</b>	Width of (Workbench) Explorer Panel
<b>MDIFrameState</b>	This reflects the size of the entire PegaREACH display. It can either be maximized or normal. 0 = normal 2 = maximized
<b>ActionWizard</b>	1 to use the Action Wizard 0 to use the Action Completer instead
<b>SaveSettings</b>	1 if the state of the Explorer Panel is to be saved when exiting PegaREACH (which nodes are expanded, etc.) 0 if the Explorer Panel is to be initially collapsed when PegaREACH starts.
<b>ActionLeft</b>	Left edge of the Action Completer or Action Wizard window, in twips
<b>ActionTop</b>	Top edge of the Action Completer or Action Wizard window, in twips
<b>ToolbarVisible</b>	1 if the toolbar is to be visible; 0 if the toolbar is to be omitted from the main window
<b>StatusBarVisible</b>	1 if the status bar is to be visible; 0 if the status bar is to be omitted from the main window.

Table B-3. Workbench Sizing Section

**[FRMPGLST] Section**

<b>Keyword</b>	<b>Description</b>
<b>HEIGHT</b>	The height of ReachList report windows.
<b>WIDTH</b>	The width of ReachList report windows.
<b>TOP</b>	Identifies the location of the top of ReachList report windows.
<b>LEFT</b>	Identifies the location of the left edge of ReachList report windows.

*Table B-4. FRMPGLST Section*

# *Appendix C*

## *Running PegaREACH 8.1 with a 7.1 PegaSYSTEM*

---

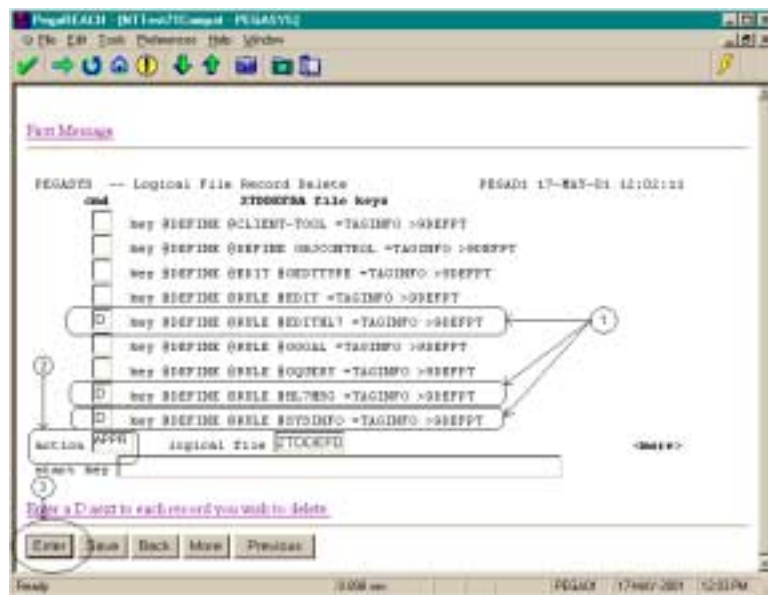
Some features of PegaREACH 8.1, primarily dealing with tag-data objects, depend on having certain records on the host. Please follow the instructions below before attempting to use PegaREACH 8.1 for workflows or configuration changes. This work will only have to be done once per host PegaSYSTEM.

## Procedures

1. Install PegaREACH 8.1 onto a Windows client machine.
2. Log into the 7.1 PegaSYSTEM.
3. Change to the Pegasys (Z) Context.
4. Issue the following command:

**GDLF**  
**ZTDDEFDA**

5. The following screen displays:



6. Place a D in the cmd field for the records indicated in the screen.
7. Type APPR in the action field.
8. Press the Enter key.
9. Note: It is possible that you may not find all of the records on the first window or in the same window. If this is the case, use the More

and/or Previous buttons to locate the aforementioned records and delete them as noted above.

## Migrating the DEFquery.txt file

1. Launch the Clipboard applet by clicking on the open book icon on the toolbar.
2. Select **Load Local Copy** from the **Import/Export** menu.
3. Navigate to the directory into which PegaREACH was installed and select the **DEFquery.txt** file.
4. Press the **Open** button.

The page will be added to the Page Names display on the left side of the Clipboard window. Although it will be marked as selected, the contents will not display. To display the contents of the page, double-click on another page and then double-click on the Defquery page. You will then see the contents of the page.

5. Save the page by Selecting **Save Page** from the **File** menu.
6. Enter the following value into the **Page Key** field in the dialog box that displays:

```
@DEFINE.@RULE.@QUERY=TAGINFO>@DEFPT
```

7. Press the **Save Page** button.
8. Exit the clipboard applet.

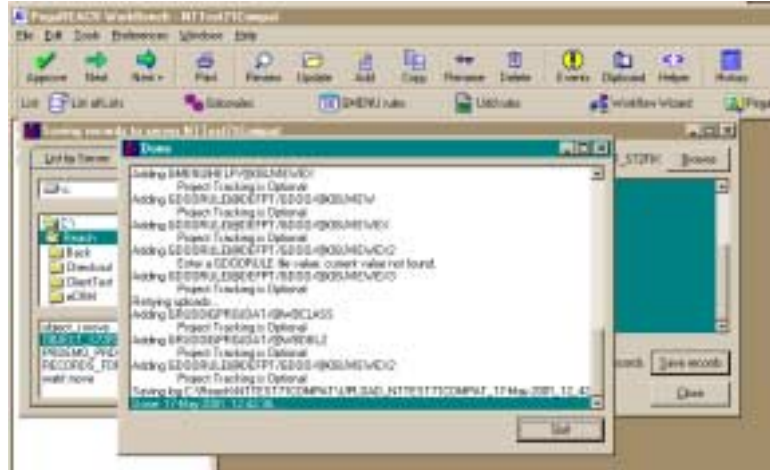
## Moving the Files

Bring up PegaREACH Workbench. Use PegaMove to move the file **OBJECT\_S72FIX.move**. This file is in the directory into which PegaREACH was installed.

1. Select **PegaMove to host** from the **File** menu, where *host* is the name of the host connection.

2. When the PegaMove Saving Records window comes up, go to the **Find Briefcase** tab.
3. Navigate to your PegaREACH directory and select the **OBJECT\_S72FIX.move** file.
4. Press the **Save Records** button.

Upon completion, the following window will display:



5. Press the **Quit** button and close the PegaMove Saving Records window.
6. Return to PegaREACH Professional. From the command window or the action completer, move to the Resource context.
7. Enter the command
 

```
GDLF
ZTDDEFDA
```
8. As before, place a D in the cmd field before the record
 

```
@DEFINE RULE IPRITEST=CONTROL>9DEFPT
```
9. Type **APPR** in the action field.
10. Press the Enter key.

11. Return to Workbench. As before, use PegaMOVE to move the file object\_R.move. This file is also in the directory into which you installed PegaREACH.
12. Close PegaREACH Workbench and your PegaREACH session in PegaREACH Professional.
13. Repeat these procedures for any host PegaSYSTEM that will be supporting PegaREACH 8.1 clients.

# *Appendix D*

## *Handling Installation Problems*

---

This appendix documents common installation problems and the corrective action to take.



## Installation is slow or stalled

In this case, close all other applications and try again. In particular, be sure that Microsoft Outlook is closed. Microsoft Outlook has been observed to stall the installation of PegaREACH on Windows NT machines.

## Word Correspondence installation problems

Word correspondence will not install on an NT machine if Microsoft Word was installed under a different user name than the one being used for the Word Correspondence installation. For this reason it is highly recommended that product installation be performed under a user id with administrator privileges.

If the Word Correspondence installation fails with a "Dialogs out of order" or "Cannot find the STARTUP-PATH setting in the Registry" error, then perform the following steps:

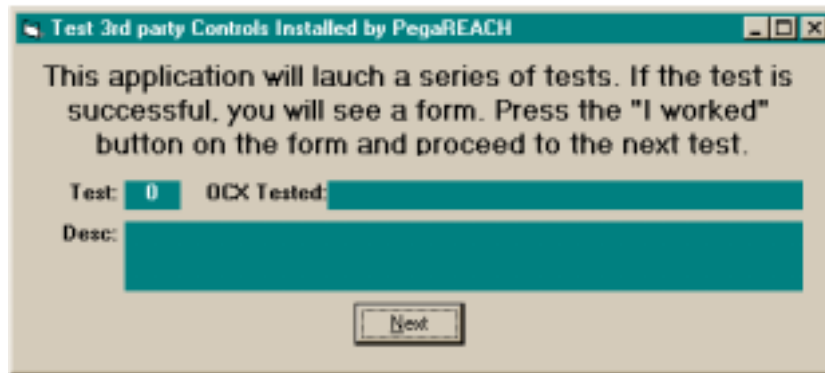
1. Open Microsoft Word.
2. Select **Tools | Options...** from the menu.
3. Select the **File Locations** tab.
4. Click on the **Startup** line.
5. Press the **[Modify...]** button.
6. Change this setting to the Office Startup folder (typically,  
`C:\Program Files\Microsoft Office\Office\Startup\`)
7. Press **[Ok]**
8. Press **[Ok]** again to close the Options dialog
9. Re-run the Word Correspondence installation

## Reach does not run after installation (Desktop or Laptop)

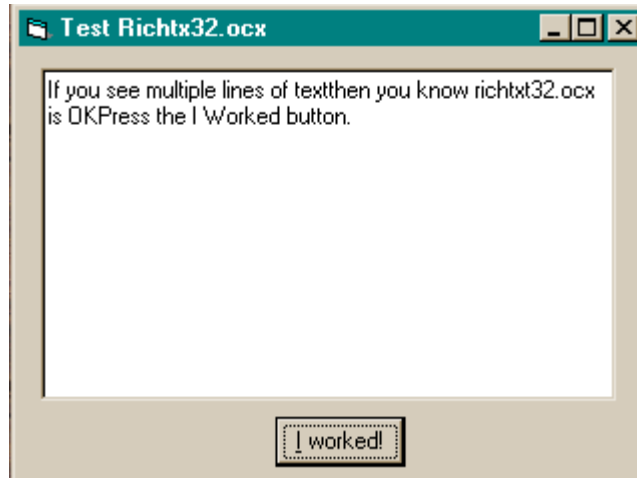
Sometimes a software configuration exists in which the system registry is not synchronized with the actual software installed. This can cause the PegaREACH installation procedure not to install one of the third party controls on which it depends.

The PegaREACH installation CD contains diagnostic programs that can identify such problems. In this case, load the PegaREACH installation CD and exit immediately. Then, from the `\Diagnostics` folder on the CD, run the program `Ct1Tests.exe`.

You will see the following window:



Press the **[Next]** button. The `Ct1Tests.exe` program will fire the remaining programs. Each program will exercise precisely one of the third party ocx's use by PegaREACH. For example, the first program executed tests the Rich Text Edit control, and displays the following window.



As you see a window popup, simply press the **[I Worked]** button. As each test is executed, the first window will display the name and version of the ocx being tested. If the window doesn't pop up, then that particular ocx has a problem. Press the **[NEXT]** button on the first window to activate the next test.

**Note:** When you test the Common Dialogue ocx, first press the **[Test]** button. When the Common Dialogue box appears, press **[Cancel]** and continue as you would with other tests.

Upon completion of all the tests, the driver program will bring up Notepad with a log of all the tests. A successful series of tests will look like this:

```

2001-06-29 11:19:01      Begin testing 3rd party controls installed by PegaREACH.
2001-06-29 11:23:39      Testing Richtx32.ocx Version 5.01.4319
                          Richtx32.ocx installed successfully
2001-06-29 11:31:29      Testing Tabctl32.ocx Version 5.01.4319
                          Tabctl32.ocx installed successfully
2001-06-29 11:31:35      Testing Comdlg32.ocx Version 6.00.8169
                          Comdlg32.ocx installed successfully
2001-06-29 11:36:08      Testing Comctl32.ocx Version 6.00.8022
                          Comctl32.ocx installed successfully.
2001-06-29 11:36:11      Testing Comctl32.ocx Version 5.01.4329
                          Comctl32.ocx installed successfully
2001-06-29 11:36:13      Testing threed32.ocx Version 1.0.0041
                          Threed32.ocx installed successfully
2001-06-29 11:36:16      Testing sscala32.ocx Version 1.0.8.0002
                          Sscala32.ocx installed successfully.
2001-06-29 11:36:19      Testing ssdw3b32.ocx Version 3.0.0034
                          ssdw3b32.ocx installed successfully
2001-06-29 11:36:21      Testing tdbg32.ocx Version 4.0.0137
                          Tdbg32.ocx installed successfully
2001-06-29 11:36:24      Testing vcf15.ocx Version 5.0.0 Build 50
                          Vcf15.ocx installed successfully
2001-06-29 11:36:26      Testing spin32.ocx Version 1.00.0044
                          Spin32.ocx installed successfully
2001-06-29 11:36:28      Testing graph32.ocx 1.0.0046
                          Graph32.ocx installed successfully
2001-06-29 11:36:30      Testing Mswinsck.ocx 5.01.4319
                          MSWinsck.ocx installed successfully
2001-06-29 11:36:36      Testing VB5 controls
                          Timer installed successfully
2001-06-29 11:36:43      Testing Pegatext.ocx
                          pegatext.ocx installed successfully
2001-06-29 11:36:48      End testing 3rd party controls installed by PegaREACH.

```

You can identify any ocx that did not test successfully by the lack of a message confirming a successful test.

## Reach does not run after installation (Laptops)

Reach will not run on laptops that run the advanced mousepad driver (**apoint.exe**). Reach will abort immediately after displaying the splash window.

If you see this behavior on a laptop, kill the **apoint.exe** process prior to opening PegaREACH. To prevent the problem from recurring, press the start button, and select **Run**. Type **regedit.exe** and the [OK] button. In regedit, go to

**HKEY\_LOCAL\_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Run**

Then right-click on the **apoint.exe** program and select delete.

# Index

## A

ACE, ..... 1-10  
 ActiveX controls  
   PegaREACH, ..... A-9  
 AIX, ..... 2-4  
 Apex Software, ..... A-8

## B

Bits Per Second Ltd., ..... A-11

## C

CHM files, ..... A-12  
 Connection List, PegaREACH, ..... 4-8

## D

Dialup Connections, ..... 1-6

## E

Editions, ..... *See* PegaREACH Editions  
 Executable program files, ..... A-4

## F

Front Page, ..... 1-6

## G

GIF file type, ..... A-17

## H

Hardware Requirements, ..... 1-7  
 Help files, ..... A-12  
 Hewlett Packard, ..... 1-9  
 Hot Dog, ..... 1-6  
 Hot Metal Pro, ..... 1-6  
 HTTP protocol, ..... 1-10

## I

IBM RS/6000, ..... 2-4

IEXPLORE.EXE program, ..... 3-3  
 Image files, ..... A-17  
 INI files, ..... A-13  
 Installation, ..... 3-5  
 Internet Explorer  
   executables, ..... 3-3  
   interacting with, ..... 4-11  
   setting preferences, ..... 4-11  
   verifying versions, ..... 3-3

## J

JPG file type, ..... A-17

## M

memory, ..... 1-7  
 Microsoft vendor files, ..... A-8  
 MSIE, ..... 4-11

## N

Netscape Commerce Server, ..... 1-10

## O

OCX files, ..... *See*  
 Outrider Systems Inc., ..... A-11

## P

P Series, ..... 1-9  
 PegaREACH  
   connection list, ..... 4-8  
   connection list, adding, ..... 4-4  
   connection list, deleting, ..... 4-5  
   connection list, modifying, ..... 4-5  
   pool information, ..... 4-6  
   program libraries, ..... A-6  
   run time operations, ..... 4-10  
   starting Professional, ..... 4-2  
 PegaREACH Editions  
   defined, ..... 1-4  
   user edition, ..... 1-4

- workbench edition, ..... 1-5
- PegaSYSTEM
  - hardware, ..... 1-9
  - software, ..... 1-9
- PegaVIEW, ..... 1-10
- PegaWEB, ..... 1-6, 1-10
- PL1 PegaSYSTEMs, ..... *See*
- Pool Information, ..... 4-6
- Preference file, ..... 2-3
- Professional edition, ..... 1-4
- Professional Edition
  - minimum workstation hardware, ..... 1-7
  - software, required, ..... 1-7
- PTP files, ..... A-15
- PTR files, ..... A-15
  
- R**
- Reach Development Kit, ..... *See*
- REACH.INI file, ..... B-1
  - FRMPGLST section, ..... B-7
  - PegaREACH section, ..... B-2, D-2
  - REACHSizing section, ..... B-4
- RS/6000, ..... 2-4
- Run Time Operations, PegaREACH, .. 4-10
  
- S**
- Security Level, ..... 4-12
- Setup, running, ..... 3-5
- SHDOCVW.DLL library, ..... 3-3
- Solaris, ..... 1-9
  
- T**
- Temporary files, ..... A-3
- Text files, ..... A-13
- True DB Grid, ..... A-8
- Txt files, ..... A-13
  
- U**
- UNIX, ..... 2-4
- User Edition
  - defined, ..... 1-4
  - minimum workstation hardware, ..... 1-7
  - software, required, ..... 1-7
  
- V**
- Vendor files, ..... A-8
- Virus Detection, ..... 3-5
- Visio, ..... A-14
- VSD file type, ..... A-14
  
- W**
- Workbench Edition, defined, ..... 1-5
  
- Z**
- ZISK agent, ..... 2-3, 2-5
- Zisk Agent, defining, ..... 2-2
- zone, ..... 4-12
- zza4 switch, ..... 2-4, 2-5
- zzcl switch, ..... 2-4, 2-5