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## PGdebt 8X trials

If you install the trial program on a PC which already has an operational earlier version, this will result in the trial version, replacing your operational version. You can revert to the previous version, as explained in this manual, but it may be safer to evaluate PG8 on a PC which does not have an operational version already installed.

*Take care with real client files.* Trial version files are now encrypted, once you have opened a file in PG8, it will be encrypted and cannot be read by PG5 or PG6.

Trial versions of PGdebt 8X are fully operational apart from a time restriction of around 6 weeks from the date you first run the program.

You need sound facilities to use the training video presentations on the CD

## Upgrading from a trial to the full program version

Using the full program CD, just repeat the same installation procedures that you used for the trial. *Do not delete anything.* Any changes made to the trial installation will be retained. You will need a License Key to install the full version.

## Windows XP

Log on as Administrator to do the installation. Refresh the desktop after installation. Make sure the PG8 icon is available on the desktop of the user groups who will use the program and that these groups have read/write privileges for the main PGdebt system folders on the local PC and and server if a network.

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## License configuration

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PGdebt from version 8.400 onwards is called PGdebt 8X and it is licensed using the CopyMinder license control system. This system works by logging onto the CopyMinder web site from time to time and checking that the license key has only been installed on one PC, (or in some circumstances, one network). To achieve this without problems you need to run PGdebt once every two weeks *whilst Internet access is available on the PC*. If Internet is not available the program will try again a few times but eventually it will lock the program until Internet is available.

After installation, the first time PGdebt runs it will ask you to configure the license. You will have three options.

- If you have a trial of PGdebt, choose the middle option “Install as a trial”
- If you have a license key starting PG8XW then choose the top option “Install as a Standalone” (do this even if you are intending to network PGdebt)
- If you have a license key starting PG8XN then choose the third option “Install as a network client” (mid 2007)

The program will contact the Internet and PGdebt will run.

If you install the same license key on two PCs the software will discover this and will take some action, probably by cutting off the first PC, so only do this if you want to *move* PGdebt to another PC. If you want to run it on both PCs you will need separate license keys for each PC. If someone else gets your license keys and uses them, it will result in YOU being cut off so please take care of your keys.

If the PC never has Internet access you will need a special version of PGdebt for the trial and a special license key which locks the program to one PC, i.e. it cannot be moved.

If you have a PG8XN license, this will restrict the number of users who can use PGdebt concurrently on a network. (mid 2007).

At the end of the trial period, the program will lock and PGdebt will not run, you will then have to either buy a license, or stop using the program.

There is only one version of PGdebt 8XW which can be used on standalones or networks, every PC must have its own license.

Users of earlier versions of PGdebt please note that “site” licensing does not apply to PGdebt 8X. The new program is licensed per PC not per site.

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## **Installation on a new PC which has not had PGdebt before**

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Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically then:

- Click the Start button
- Select Run
- Type X:\CDSETUP ( where X is your CD drive letter)
- Press OK

Follow the prompts and the program should install automatically. It should not be necessary to change any of the default settings for a trial installation. That completes the basic installation...click on the PG8 icon to start the program.

### **Configure the license**

The first time the program runs you will need to configure the license as described earlier.

### **Folders**

If you accepted the default settings, as recommended, the program will be installed in C:\PGdebt8

The data folder will be C:\PGdebt8\data

The standard letters folder will be C:\PGdebt8\stanlets

The folder for shared files will be C:\PGdebt8\common

### **Removing the program**

If you decide to remove PG8 from your computer please use the 'REMOVEPG' program. This is set up for you in the PGdebt 8 group on the Windows programs menu. Just click on the REMOVEPG item and follow the instructions. You can safely remove any files left behind. Any previous version of PGdebt will be removed at the same time...it will not revert to a previous version.

### **If you are installing on a network**

Please read the section on network configuration.

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# Upgrading a standalone PC which already has PGdebt 5,6 or 7

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## Upgrading PGdebt 5

Please ask for the separate instruction sheet

### Installation

Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically

- Click the Start button
- Select Run
- Type X:\CDSETUP ( where X is your CD drive letter)
- Press OK

Follow the prompts and the program should install automatically. The program will find your earlier version and will combine with it, retaining all your existing customisation and settings and all client files. You should be able to simply click the PG8 icon and carry on.

### Configure the license

The first time the program runs you will need to configure the license as described earlier.

### Folders

If you accepted the default settings as recommended, the program will find the previous instance of PGdebt and combine with that. The folder it goes into will depend on what it finds...it will be the folder of the first every installation of PGdebt on the PC, so it may be either C:\PGdebt7 or C:\PGdebt6 or C:\PGdebt5

It does not matter whether the main program folder is PGdebt8, PGdebt7, PGdebt6 or PGdebt5. The program knows which it is !

The data, standard letters and shared files folders will all be unchanged and will retain their previous settings.

### Make a backup soon and reset passwords

Make a backup as soon as you are sure everything is completely correct. Existing backups made with PG5 or PG6 will not be compatible with PG8. Installing PG8 removes all previous passwords.

### Removing the program...*please read carefully*

**If you want to *revert* to a previous edition of PGdebt then do *NOT* remove PG8 first**, see the section below.

If you do want to remove PGdebt permanently, use the 'REMOVEPG' program. Remember that it has already combined with PG5/6/7 and ALL PGdebt versions will be removed together...it will not revert.

Some files added since the original installation may remain behind, you can safely remove these manually.

### Reverting to a previous version of PGdebt

Do **NOT** remove PG8, just reinstall your previous version from the original (previous version) CD. This will reinstate your previous version, but certain changes made whilst PG8 was running will remain. e.g. if you change the Manager name or stats setup, this will be retained when you revert.

### If you are installing on an existing PG5 or PG6 network

It should not be necessary to do anything further to PG6 networks, but on PG5 networks you may need to copy the converted creditor list to the server. Please see the special instructions sheet.

### If you are installing on a network for the first time

Please read the section on network configuration.

### Moving PGdebt to another PC

Please see the separate chapter later in this manual if you need to do this...it is not as simple as you think to retain all your data and settings.

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# Networking (before you start)

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This guide is intended to be used by the *Network Supervisor* who will be responsible for setting up PGdebt 8 on the network. It is essential that each network has a person who is responsible for its set up and maintenance.

Please do not attempt to set PGdebt up on a network unless you properly understand the contents of this chapter. You must know how to *share* and *map* drives and directories on all the computers and server, if there is one, and you must have the appropriate access permissions to do this.

Please ensure that the network is properly up and running correctly before starting. Note also that PGComputing will advise on network matters related to PGdebt only...we cannot troubleshoot your network over the phone !

The PGdebt 8 trial program will work on a network...please use the trial program to test that PGdebt will run on your network !

## Peer to peer networks

PG8 is suitable for running on simple office networks, sometimes known as 'peer to peer' networks, where every computer is more or less equal in importance and can read and write data to the other computers.

Each computer must have its own hard disc (C:) and the program must be installed separately on each computer.

*The program runs locally on each computer*, but data (client files) and other shared files may be stored in a central location on one of the computers and accessed from any of the computers.

## Client/server networks with all programs installed on the server

PGdebt is not suitable for use on the type of network where one server computer contains the program and the other workstations (computers) *use that program* and do *not* have their own copy of the program installed locally on their local hard disc. Applica networks are like this and PGdebt will not run on them.

## Client/server networks with programs on each workstation

Networks of this type should be able to install PG8 locally on the workstations and in this case, data and common files should be located on the server and accessed from any of the other computers.

There are many different network arrangements and it is not possible to say here whether a particular one will meet the above requirements. The network supervisor must decide whether PG8 can be installed as above.

## Passwords

Please *always* ensure that a 'Supervisor' password is set up to stop unauthorised users disrupting the network configuration.

## Other options

There are several checkboxes on the *Options|Supervisor|Security* screen which are of use on a network. One prevents the user at each workstation from making permanent changes to your carefully worded and laid out standard letters. The other overrides a signatory and ensures that the 'Manager' signatory is always used.

## Re-installing PG8 on a network

Make sure you have the necessary backups first !

Do not delete or uninstall anything !

Just repeat the installation routine, using the original CD. All existing configuration settings letters etc. will be retained.

## Drive directory mapping

In the next sections the server/master computer has been assumed to be mapped as (say) 'J' for simplicity. There are many variations on this, but in general it is probably better not to map the whole drive, but just the necessary directories. This restricts access to the server from the workstations.

## Windows XP

PG8 runs perfectly on XP networks, but there are sometimes initial problems due to access rights and permissions not being correctly set. Log on as Administrator to do the installation. Refresh the desktop after installation to ensure any old icons are removed. Manually delete any unwanted icons.

Make sure the PG8 icon is available on the desktop of the user groups/individuals who will use the program and that these groups have read/write privileges for:

- The main PGdebt system folder on the local PC
- PGdebt folders and subfolders on the server which hold data and other shared information

If you receive warning messages about 'access denied' or 'DBISAM errors', this is a good clue that the user does not have the permissions required to write to the folders mentioned above.

## Configure the license

The first time the program runs you will need to configure the license as described earlier.

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# Installation on peer to peer networks

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## Windows XP

Log on as Administrator to do the installation. Refresh the desktop after installation. Make sure the PG8 icon is available on the desktop of the user groups who will use the program and that these groups have read/write privileges for the main PGdebt system folder and data folders.

### **OPTION 1: Existing PGdebt 5 networks**

Request special instructions.

### **OPTION 2: Existing PGdebt 6 or 7 peer to peer networks**

If PG6 or 7 is already networked and is running OK, just install the program on each PC and just carry on. Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically

Click the Start button  
Select Run  
Type X:\CDSETUP ( where X is your CD drive letter)  
Press OK

All existing settings should be picked up. That is all there is to it. Reset all passwords as reinstalling removes these. Note that the program will be installed in the C:\PGdebt6 or 7 folder as it combines with your existing installation

### **OPTION 3: Completely new peer to peer network installations**

#### **1. First install PG8 on every PC**

PG8 runs locally on every workstation, but reads its information from one PC, called the Master. First install PG8 on each computer, Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically

Click the Start button  
Select Run  
Type X:\CDSETUP ( where X is your CD drive letter)  
Press OK

Note that the folder will be the one any previous version of PGdebt was using. It will be C:\pgdebt8 for a new installation, or C:\pgdebt7, 6 or 5 if a previous version exists. PG8 combines with the previous version, in its original folder.

Choose one of the computers which has PG8 installed, to be the 'Master' PGdebt computer. This will be the one which will hold the client data files and standard letters and a vital configuration and common database files.

After initial installation PG8 will run locally, until you configure it for the network.

#### **2. At the Master PC**

Assuming the program has installed into the default directory C:\PGdebt8.

From Options/Supervisor/File-Paths...note the names of the

Data folder	default C:\pgdebt8\data
Standard letters folder	default C:\pgdebt8\stanlets
Common files folder	default C:\pgdebt8\common
Draft letters folder	default C:\pgdebt8\draft

You may retain the defaults, or set up new folders at any convenient location. Do not delete any folders, make new empty ones at the new location, if you wish.

#### **3. Share the Master PC folders**

Ensure that these folders are shared, whether they are default or new ones.

#### **4. Fill the Master PC folders (do this before step 5)**

If you are using the default folders, move to step 5.

If you set up new empty folders in a new location, copy across the contents of the default folders (which have files in them) to the new ones (which are empty at this stage).

#### **5. Configuration...do this on each workstation PC**

Please ensure that the workstations can recognise the Data folder, Standard letters folder and Shared files folder on the master machine by a logical drive letter, it will be necessary to appropriately map the master to ensure this. (For this example, assume the directory C:\PGdebt8 on the master is mapped as logical drive J).

Choose *Options|Supervisor|Files/Paths* from the main menu then...

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## 5A. Set the Data folder

The default will be C:\PGdebt8\data. Click 'Browse' to change this to the path to the *data directory on the master computer*, in the top box on this screen. e.g.. If C:\PGdebt8 on the master is 'J' this should be set to J:\data.

Check the box entitled 'Prevent user changing this folder'. This will ensure that users do not scatter their files all over the network.

## 5B. Folder for Standard letters

Set this to the *stanlets directory on the master computer*. eg. If C:\PGdebt8 on the master is 'J' this should be set to J:\stanlets. This ensures that all users will use the same pool of standard letters. You may allow users to have their own standard letters on their own computers, in this case set C:\PGdebt8\stanlets locally.

## 5C. Folder for draft letters

Set this to the *draft letters directory on the master computer*. eg. If C:\PGdebt8 on the master is 'J' this should be set to J:\draft.

## 5D. Folder for shared files This is of crucial importance !

Set this to the *shared files directory on the master computer*. eg. If C:\PGdebt8 on the master is 'J' this should be set to J:\common. All workstations **must** use the same common folder and this must be backed up frequently

**5E.** Finally set the Supervisor password to restrict access to these config settings and also the User password, both of which will have been deleted by the installation process

**5F.** Make sure every user has a default printer set up. No printer is actually required to be plugged in, but a default driver must be available

## 6. Finally copy your existing data to the Master PC

If you were previously using PGdebt on a standalone, you will need to copy your existing files across to the Master PC. Copy the contents of the Data folder, Standard letters folder and Shared files folder across to the same folders on the Master PC (the new ones if you made new folders), so that all the network can now use them. If you have PGdebt on several standalones copy all client data files across, but only copy the standard letters and common files from the best PC. Your old creditor database will not be moved, it has to be converted first as described earlier.

## 7. Dockable Laptops

If you have a dockable laptop PC, a system exists in PG8 whereby you can use it on and off the network. You will need to install PG8 network version on the laptop. Please also see the final chapter of this manual...Important tips.

**FINAL TIPS** If you get a message saying "Cannot find PGCOMMON.INI" or "access denied" the problem is probably one of these:

1. If you made new folders, you have not filled them in step 4
2. The drive mapping is not correct
3. You have not selected the correct common folder on Options/Supervisor/ Files-Paths
4. The **user** does not have full access to the data folders on the master PC

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# Installation on Client/Server networks

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## Windows XP

Log on as Administrator to do the installation. Refresh the desktop after installation. Make sure the PG8 icon is available on the desktop of the user groups who will use the program and that these groups have read/write privileges for the main PGdebt system folder locally and the pgdebt data folders on the server.

### **OPTION 1: Existing PGdebt 5 networks**

Request special instructions

### **OPTION 2: Existing PGdebt 6 or 7 client server networks**

If PG6/7 is already networked and is running OK, just install the program on *each PC*. Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically

Click the Start button  
Select Run  
Type X:\CDSETUP ( where X is your CD drive letter)  
Press OK

All existing settings should be picked up. *Reset all passwords which will have been wiped in the upgrade.* That completes the installation. Note that the program will be installed in the C:\PGdebt6 or 7 folder as it combines with your existing installation.

### **OPTION 3: Completely new client/server network installations**

#### **1. First install PG8 on each workstation**

PG8 runs locally on every workstation, but reads data from the server.

Install PG8 on each workstation, but not on the server. Place the CD in your CD-ROM drive...it should run automatically and you will see the opening screen...if it does not run automatically

Click the Start button  
Select Run  
Type X:\CDSETUP ( where X is your CD drive letter)  
Press OK

Note that the installation folder will be the one any previous version of PGdebt was using. It will be C:\pgdebt8 for a brand new installation or C:\pgdebt7,6 or 5 if a previous version exists. PG8 combines with the previous version, in its folder. It is not necessary to install PG8 on the server, but it can be done if you do not have a proper server backup system and want to use the PG8 in house backup.

After installation PG8 will run, but locally only, until configured for the network

#### **2. At the server**

Data and other common files should be located on the server, make a new folder (C:\PG) (*Don't call it C:\pgdebt8*) and four sub-folders on the server to hold them, as follows.

data folder (all client files)	e.g.	C:\pg\data
standard letters folder	e.g.	C:\pg\stanlets
shared files folder	e.g.	C:\pg\common
draft letters folder	e.g.	C:\pg\draft

Make sure the folder C:\PG is *shared*.

#### **3. Fill the new folders on the server (do this before step 4)**

**If you were previously using PGdebt on a standalone**, you will need to copy your existing files across to the server. Copy the contents of the Data folder, Standard letters folder and Shared files folder across to the folders you have just made in step 2, on the server PC, so that all the network can now use them. If you have PGdebt on several standalones copy all client data files across, but only copy the standard letters and common files from the best available PC (the one use most for PGdebt).

**OR If you have never had PGdebt before**, then copy the contents of the Data folder, Standard letters folder and Common folder from any workstation, across to the same folders on the server PC, so that all the network can now use them.

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## 4. Configuration...do this on each workstation

Please ensure that the workstations can recognise these folders on the server machine as a logical drive letter, it will be necessary to appropriately map the server to ensure this. (Let us assume for this example that the directory C:\PG on the server is mapped from the workstations as drive J)

Choose *Options\Supervisor\Files/Paths* from the main menu.

### 4A Data Directory

Change this to the path to the *data directory on the server*. eg. If C:\PG on the server is 'J' this should be set to J:\data  
Check the box entitled 'Prevent user changing this folder'. This will ensure that users do not scatter their files all over the network.

### 4B Folder for Standard letters

Set this to the path to the *directory for standard letters on the server*. eg. If the C:\PG on the server is 'J' this should be J:\stanlets. This ensures that all users will use the same pool of standard letters. If required you may allow users to have their own standard letters on their own computers, in this case set C:\PGdebt8\stanlets locally.

### 4C. Folder for draft letters

Set this to the *draft letters directory on the master computer*. eg. If C:\PG on the master is 'J' this should be set to J:\draft.

### 4D Folder for shared files This is of crucial importance !

Set the directory to the path to the *directory for shared files on the server*. eg. If C:\PG on the server is 'J' this should be J:\common. All workstations must use the same common folder and this must be backed up frequently.

4E Finally set the Supervisor password to restrict access to these config settings.

4F Make sure each user has a default printer set up. No printer need be plugged in, but a default driver must be available.

A Technical note is available with more details and a step by step guide, this can be found at [www.pgcomputing.co.uk](http://www.pgcomputing.co.uk)

## 5. Dockable Laptops

If you have a dockable laptop PC, a system exists in PG8 whereby you can use it on and off the network. You will need to install PG8 network version on the laptop. Please also see the final chapter of this manual...Important tips.

## 6. Arrange backup procedures

Make sure you arrange for the PGdebt folders made in para 2 to be backed up frequently. Add these folders to the server's own backup if necessary, or if all else fails, load PGdebt on the server, configure it as described here and use the PG in house backup system.

**FINAL TIPS** If you get a message saying "Cannot find PGCOMMON.INI" or "access denied" the problem is probably one of these:

1. If you made new folders, you have not filled them in step 4
2. The drive mapping is not correct
3. You have not selected the correct common folder on Options/Supervisor/ Files-Paths
4. The *user* does not have full access to the data folders on the master PC

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# Backups

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PGdebt constantly changes many files whilst running, if the PC is stolen or damaged or the hard disc fails and you need to reload PGdebt from scratch, you will not be able to restore the changed files to their same state without a backup, reloading just returns it all to the state of the original CD.

***You MUST backup regularly and if you call for tech support I may ask to use the backup discs...without them I may not be able to help.***

PG8 cannot use backups made in PG5 or PG6...(and preferably not PG7) please make a fresh backup of your PG8 installation quite soon.

## **Backups on Standalone PCs (own backup system)**

PG8 has an easy built in backup system but, if you already have an established backup routine running, as many users will, then you do not need the built in backup, just add these folders to your existing backup path.

**Data Directory** (for client files)

**Standard letters directory** (for customised standard letters)

**Common files directory** (for vital statistics data and the creditor list)

## **Backups on Standalone PCs (PG internal system)**

This has been greatly simplified and, once set up, only takes a minute or so to complete.

**To set up the backup** go to Options/Supervisor/Files-Paths and set the folders to be backed up, and the place where the backup is to go, to in the bottom two boxes.

Once these are set, they will be remembered by the program. This only has to be done once.

Browse to get your data folder into the 'Folders to be backed up', all necessary PGdebt system files will be included automatically

Backup destination can be anywhere, probably a writable CD or zip is best or a floppy can hold most backups as the files are compressed.

**To make a backup** go to Options/Supervisor/backup, or File/backup. The window has two sections for backup and restore from backup. To make a backup just click the button labelled "Start Backup", follow the instructions. It is that easy.

Make backups on alternate discs so that one disc has week 1,3,5 etc. and the other has week 2,4,6 etc. This prevents one backup destroying the previous one...you always have two backups at any one time. Some people would use 3 discs !

## **Backups on Peer to Peer networks**

It is vital to back up the following folders on the PGdebt Master PC:

**Data Directory** (for client files)

**Standard letters directory** (for customised standard letters)

**Common files directory** (for vital statistics data and the creditor list)

This last item is very important, the pgcommon.ini file included in it cannot be rebuilt from scratch. It must be restored *from backup* if damaged or lost.

**NB.** The PG8 built-in backup routine can be used on the Master PC (only) to backup these folders. However most (all ?) network supervisors will already have robust network system wide backup routines in place, in which case it is only necessary to add the above folders, on the master, to the existing routine. Of course PG8 must be installed on the server to make use of the backup facility, it is not required for any other purpose.

## **Backups on Client/Server networks**

It is vital to back up the following files/directories on the *server* computer:

**Data Directory** (for client files)

**Standard letters directory** (for customised standard letters)

**Common files directory** (for vital statistics data and the creditor list)

This last item is very important, the pgcommon.ini file included in it cannot be rebuilt from scratch. It must be restored *from backup* if damaged or lost.

**NB.** The PG8 built-in backup routine can be used on the Server (only) to backup these folders. However most (all ?) network supervisors will already have robust network system wide backup routines in place, in which case it is only necessary to add the above folders to the existing routine. Of course PG8 must be installed and properly configured on the server to make use of the backup facility, it is not required for any other purpose.

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## Using PGdebt on multiple PCs

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### **This is NOT NECESSARY on networked PCs**

Subject to the ownership of appropriate multiple licences, some owners wish to install and use the program on several computers which are not networked. This is no problem, as the several installations are not linked at all and they will gradually grow to be slightly different. For instance the precise wording of a standard letter may be changed on one computer and not on the others.

If it is required to combine the statistics, from several computers then very great care must be taken to ensure that the statistics setup is **exactly** the same on each machine. The statistics setup information is stored in the statistics control file and it is **absolutely vital** that this file is **identical** on each machine.

The easiest way to achieve this is to declare one of the computers to be the 'Main' PGdebt computer and to make all significant statistics setup changes to that machine. (Please set a Supervisor password on the other machines to ensure the stats setup cannot be changed on them)

Then use the Built in 'sync' disc routine to copy the statistics control file and other important files from the main machine to the others to synchronise them. This must be done whenever the program calls for it or every two months, whichever is more frequent

### **Making the PGdebt 'sync' disc**

Go to the Options |Supervisor|Sync screen. Select the disc (floppy, CD,zip) location where the sync file will be located. Then click 'Make sync disc'. All relevant files will be copied to the disc and it can then be used to synchronise another PC.

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## **Synchronising the other PC**

Go to the Options |Supervisor|Sync screen. Place the 'sync' disc in the drive . Browse to set the location of the sync disc. Select the files you wish to be updated and click 'Sync this PC now'.

Updating the statistics control file cannot be deselected, but the other options should be chosen as you wish, depending on how your office and workers are organised, for instance, they may all prefer to have their own versions of the standard letters and in this case, leave the standard letter box empty.

## **When is synchronising not required on multiple PCs**

If the PCs have completely separate case loads and combined stats are not required.

If no changes are ever made to the default PG8 statistics categories

If you are not using PG8 for statistics

If the PCs are networked or if the standalone PC is using the Dockable Laptop system

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# PG8 Quick guide

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## Tutorials/Videos

The CD contains many video presentations to teach you PGdebt. Please try to find a PC with a sound system and view these to learn the program...if all else fails, these notes may help to explain the basics.

## This quick guide

This makes use of the sample files which will be set up for you by the trial installation. You can run through the main areas and facilities of PG8, following the guide...it may be easier to get a colleague to read it while you go through it on screen.

## Starting the program

Click the PG8 icon, the opening screen appears, click OK or enter password. Loading will continue and the *Main Window* appears with the *Client Details window* within it so that you can check that you have the correct client ! On first starting it will be empty. The *Financial Statement* and *Creditor Data* Windows are created, but minimised.

## Load an existing Client file

Click on the File|Open menu items and then choose the file SAMPLE JONES.PGA which is in the C:\PGDEBT8\DATA directory. The Client details will fill in the boxes. Recently used files appear at the foot of the File menu for quick access.

## Client Details

The Client details are on the first of three tabs. You can change anything at any time. Note the box for selecting the *Case Worker* and the *File Open date* and *Review date* selection boxes. To change a date, click on the date and use the calendar.

The memo is for odds and ends...it is intended for a few lines only.

Select the *Statistics tab* and change some of the items, using the drop down list boxes.

Select the *Case Record tab*. This is an area for you to enter anything relating to the case. Letters sent are recorded here and a lot of information is automatically entered into the case record. You may edit whatever is in the window and add or delete any text you wish. Press the *Preview* button to see the case record and *Print* to print it out. Close the Client Details window.

## Financial Statement Window

Open this by clicking on the minimised icon, or from the FS item on the main menu.

This window is re-sizable and contains everything related to the Financial Statement (FS). There are four tabs..click on *Inc/Exp* to view the Income and Expenditure screen. You may change anything or add new items and recalculation will be automatic. Totals are shown on the right. Changes will not take effect until you press the *Enter* key or move the cursor to another cell. You can set up your own standard lists for these pages and save them in the 'New Weekly' and 'New Monthly' templates.

Put the cursor over the expenditure grid...see the help comment on the status line at the foot of the screen. It shows the 'suffixes'. To show how these work, add a new expenditure item of 'Insurance' costing £100 annually. To do this enter 100a ( A for Annual) in the amount column and when you press enter it will change to the pro-rata amount per week. (£1.92).

Use the help system now to learn more about suffixes..Click the *Help* menu item then *Index* then type in 'suffix'...the highlight will jump to the correct help item...double click on this to see the help topic. Please use the help system...a lot of work has gone into making it very comprehensive, most things are covered ! Close the help window.

Click on the *Priority* tab. This shows the Priority Debts Screen, enter a new debt...'Lloyds bank', £3000. Note that you must put in the negotiated repayment yourself...make it £6.00. PGdebt does not calculate Priority repayments, these are set by negotiation with the creditors.

Click on the *Non-Priority* tab. Note the payments. Enter a new creditor (make it Vodafone, £100 !). You will not be able to put the cursor in the 'Payment' column. PGdebt calculates these figures for you. The payment is calculated, it is very small, the other payments are reduced.

To round up this small payment set the figure you wish to round up to (£1.00) in the *Round to* box and click *Smallest* in the Rounding Box. The smallest payments will be increased to this figure. Click *None* to stop rounding up. Try other rounding options. Click *Weekly* or *Monthly* in the *Pay Period* box and watch the payments change to that period.

In general, debt repayments should be 'equitable' or 'pro-rata' to treat all creditors equally but if you need to set a particular figure you may do so. Place the cursor *in the line you want to change* and press the *Manual* button...follow the prompts and the figure you wish will be inserted, overriding the automatic calculations. Press the *Make line equitable* button to cancel the manual payment and revert to equitable distribution.

Press the *Print Options* tab. This has various options relating to the appearance of the FS. You can show or hide the

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creditor names and repayments and adjust the wording of the four 'user lines' among other things.

Other options to change the FS are on the panel on the right of the window...Type 1 or 2 FS styles (type 2 has notes by every line). Show or hide the notes, Hide or show any empty lines (lines with no inc/exp figure are regarded as empty). Press the *Preview* button to preview the FS or the *Print* button to print it. Close the FS window.

### **Creditor data window**

Open this from the minimised icon or the main menu. This window deals with creditor addresses mainly. Clicking on the two big VCR (video) type buttons at the bottom left takes you through each creditor in turn. The screen shows the Creditor's name and address, debt category for statistics, and a record of letters sent. Move through the creditors until you come to Vodafone.

Click on the 'Show database' checkbox at the top, and the right of the screen will change to show the Creditor database which holds details of your creditor list. The left of the window refers to your client, the right refers to the general creditor list.

Use the database to put in the address for VODAFONE, it should be already there. The database will automatically find the nearest creditor name for you. If it is correct, then press the button with the green arrow and the details will be entered on the left for you. Change any items you wish, if required.

If the creditor found is not the right one, search the database using its own more complex database VCR controls at the bottom right. If the correct address is not available, then type in the details on the left and press the 'Add to database' button to add it for next time !

If the database does not search automatically every time you move to a new creditor, then press the 'Search DB' button. See the help files to set 'automatic search' mode.

Page through the clients' creditors to Lloyds Bank and give this creditor an address, then close the window.

### **Mail merge standard letters**

Press the *Mailmerge* item on the Main menu and the *Word Processor* window will appear.

This is a standard, windows type word processor which should be fairly easy to use. Select an existing letter from the list.

To do this choose *Letters|Open Standard letter* from the main menu and then choose letter 'OFFER.RTF' from the list. The *offer* letter will load onto the screen...you could change it, but do not do so now. Note that it is full of mail merge codes.

Before printing the letter we must *merge* it and before that we must decide who to merge it to ! On the right of the window is the *merge to* box...choose the third item down *All Non Pri*. Now press the *Merge* button and the merge will take place. All the codes will disappear and be replaced with text appropriate to the merge. In this case we merged to all the non priority creditors and the letters to them are now on the screen as separate pages.

Print the letters by pressing the *Print* button, then *OK*, after which a dialogue box allows you to enter a comment. This comment will go into the Case Record automatically recording that the letter was sent. Add something if you wish then press *OK*.

Now press the button labelled *Summary* and that completes the Mail merge.

The letters will all be merged with correct names, references and details of payments etc. Just sign them and fold them into window envelopes for posting. The summary sheet is a copy of the last letter and a list of all addresses it went to. Staple these pages together and keep them as a record of what was said to whom in the letter!

Now preview the Case Record again, and you will see that the letter you just sent has been recorded in the record along with the creditors it went to. Print it out for your records.

### **Save the file (not if you want to preserve the original sample file)**

Choose *File|Save* from the main menu to save your data. The File saving dialogue box allows you to set (or ignore) the File 'status', review date and review reason. It is worth taking the time to set these as you will see when you...

### **Print the File list**

Choose *Statistics | Client file list* from the main menu and a list of all files in the current data directory will appear. Sort it in the order you wish and then press *Print* to print out a hard copy of your current case load !

### **Try some statistics**

Choose *Statistics|View latest stats run*...the stats form appears but it will be rubbish until you do your first stats run. Click on the button 'New stats run'...then *OK*...then *YES*...Then press 'Start/Add'...then click *NO* (to another folder)...Your stats will be compiled for the cases in the directory C:\PGDEBT8\DATA. Play around with the buttons on the right and print out your stats !

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# PG8 training and advice

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## Training tutorials videos on the CD

The PGdebt 8 CD contains a number of training, audio/video presentations. These amount to around two hours instruction. To run the videos, place the CD in the drive and allow it to auto-run, if it does not do so then:

- Click the Start button
- Select Run
- Type X:\CDSETUP ( where X is your CD drive letter)
- Press OK

The main installation menu will display, and it has a list of the videos available, simply select the one you want then click the 'View video now' button.

The videos have a soundtrack and you must have a sound card in your PC to hear this as well as speakers. Almost all modern PCs have these facilities but failing this you may take the CD to another PC which has sound and play it there.

If you have a sound card, but no speakers attached, it may be possible to connect a headset to the card and listen through that. It is not possible to use the headset plug on the front of the CR-ROM. Headsets are quite cheap at a high street electronics shop... (£10 upwards) only a cheap one is needed.

While the video is running you can pause it and restart it simply by pressing the space bar on your keyboard. While paused, a small video control panel appears and you can use the mouse to adjust various items and the sound level, if required. It is fiddly to get the mouse onto the panel but it can be done !

## PGdebt web site

This is at [www.pgcomputing.co.uk](http://www.pgcomputing.co.uk)

The PGC web site is intended to provide a service to PGdebt users and potential users. It contains a large amount of information about PGdebt with sections on Self help, FAQ's, Problems, Technical Notes, Reviews, Users comments etc. etc. as well as a download area for Manuals, help files and other items.

## Quick Start Guide

If you cannot view the videos, try the quick guide, included in this manual

## E-mail (preferred) and telephone

E-mail address for advice is [support@pgcomputing.co.uk](mailto:support@pgcomputing.co.uk)

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## Moving PGdebt to another PC

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Occasionally it may be required to move PGdebt from an old standalone PC to a new standalone PC, possibly upgrading at the same time as moving. Please use the following procedure. A more detailed description is in a tech. bulletin on the PGC Web site [www.pgcomputing.co.uk](http://www.pgcomputing.co.uk)

NB. Do not use the "backup" disc for this, the results are unpredictable when a backup is restored on a different PC from the one it was made on, as the file and folder structure may not be the same. Copy the files manually, it will only have to be done once.

If the original PC has PGdebt5 on it (PG5). This procedure will not move the old PC creditor database. This will have to be sent to PGC for conversion. Check the PG web site and see the tech bulletin about this.

- 1 Install PG8 on the new PC, test it, then close down PG8
- 2 At the OLD PC, locate the folders for:
  - Client data files (usually C:\pgdebtX\data or samples)
  - Standard letters (usually C:\pgdebtX\stanlets)
  - Shared files (usually C:\pgdebtX\common) \*\*\*VITAL\*\*\*
  - Draft files (usually C:\pgdebtX\draft) (PG7 and 8 only)"X" may be 5/6/7/8 depending on your PG usage history  
These folders are shown on the Options/supervisor/files-paths screen if you are not sure what they are.
- 3 Copy the files contained in these folders across to the equivalent folders on the new PC, using floppies if necessary. It may be better to copy one folder at a time to keep it simple. Don't *replace* the folders on the new PC, there may be files in them which are needed, just copy the contents of the folders adding the files to those already there, overwriting if prompted.
- 4 Start PGdebt and check the items at Options/supervisor/defaults and update these if required.
- 5 This method does not copy across certain configuration files, screen positions etc, but they are of minor importance and you can soon sort these out in the normal course of using the program.

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# The CFS in PGdebt 8

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The Common Financial Statement is an initiative of the British Bankers Association and the Money Advice Trust. Questions about the principles of the CFS should be directed to these organisations.

## Principles

The main difference with the CFS is that the concept of trigger figures is introduced and consideration must be given to sale of assets. The trigger figures place a limit on what may be regarded as normal expenditure and within these figures, is expected to be accepted by creditors who accept this system, without question. If the expenditure exceeds the triggers, an explanation is required.

There are layout changes and some other minor aspects but these are minor compared with the first two. PG8 has retained the PGdebt Financial Statement (FS) layout, with only small changes.

The trigger figures are supplied by MAT/BBA and cover four family groups. Each of these has separate and different trigger figures. The figures have been agreed at BBA/MAT and are reviewed from time to time. The trigger figures are stored within PGdebt 8. The new system is only available to new clients. Your existing files will be retained exactly as now, they cannot be converted directly.

## Tutorials

The PGdebt CD contains tutorials on the subject of the CFS and trigger figures

## Client details

The only real difference here is the “Dependents” section. This has the existing box for children and a new one for dependents who are not children (young adults or older people). Just put in figures as now. A new box for ages is required for the CFS fill this in as if you were writing it after the word aged ( e.g. 5, 7 and 12, or perhaps 11, 12 and over 65 ). PG8 will sort all this out and put it on the CFS at the top.

## Templates

At present PG8 has two templates for New Monthly and New Weekly clients, the new system adds a further template for the CFS and choosing this allows the appropriate triggers to be selected.

Click on the one you want and the program starts as normal.

You may save the CFS template, in the same way as saving a normal PG8 template, but there is little that can be changed, probably user lines 3 and 4 are the main variables. The income and expenditure lines cannot be changed by the user, these are drawn from a special file when required. Note that there is only ONE CFS template, which has 4 sets of triggers stored in it automatically.

## Trigger figures

These are stored within PGdebt. From time to time they may be expected to be updated by the MAT/BBA. If another set of figures is imminent, these are also stored in PG8 and the change over will be automatic on the appointed day. There are also ways to change these figures manually if necessary.

Bear in mind that if the CD is used to install the program on a new PC in the future, the trigger figures installed will be those that were current when the CD was produced. You should download the latest triggers from the PGdebt web site or from the BBA or MAT web sites and update the figures.

Note that if the program is reloaded, it is recommended that this is done ‘over the top’ of the existing installation. In this case the original triggers will be retained, as these might have been updated.

## Income and Expenditure

The CFS is MONTHLY and cannot be changed, though you may enter figures for any time period with a suffix, as before (12.00A becomes 1.00 per month). “Notes” are now referred to as “Comments”

The FS screen is much as now, but the background colour for CFS cases is green to avoid confusion. The income and expenditure items are already filled in for you, you cannot change these. This is at the request of BBA/MAT. They come from the MAT/BBA budget sheet which covers every sort of Income and Expenditure, you may find it easier to use this sheet. The type of trigger figures (single/couple etc) is in a green box at the top of the screen

The triggers themselves cannot normally be seen by the adviser. This is at BBA/MAT request and is to prevent the figures being seen by clients who may be sitting nearby. Advisers will soon know these figures off by heart, but they can be brought into view if required by clicking the green box at the top with the type of triggers in it, and holding the mouse button down. This is deliberately not *too* obvious, to ensure that a deliberate action is needed to show these figures, by someone who knows the program. Releasing the mouse button hides the triggers again. At the top of the triggers

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column, is the version number of the triggers.

Triggers only exist for certain expenditure items, at the foot of the list and coloured red/brown, entering expenditure in excess of the figures will cause the expenditure amount to go red and an orange warning appears at the lower right of the window

At the top is a checkbox called "Sale of assets considered". This is a CFS requirement and will always be empty for a new client. If you place a tick in the box then a suitable statement appears at the top of the FS. Leaving the box empty leaves out the statement...(it does NOT cause a negative statement to be printed.)

The popup menus, obtained by right clicking in the Income and Expenditure grids are changed...sorting is not possible nor can lines be added or deleted. It is possible to change to another family grouping so if you start off with a COUPLE FS and then realise it should be COUPLE WITH CHILDREN, you can change the triggers without starting again. You can also change a current file to the latest trigger figures, if these have changed recently.

### **FS Options**

The four User lines still remain, but the top two are not available to you as they are used by PGdebt for automatic CFS data about assets, dependents etc. You may still use and save the last two lines. The HOUSEHOLD button is not available, this is now automatic on the CFS user line 2.

### **Printing the CFS**

This is exactly as now except that the Agency name at the top is missing. The Agency (bureau) is identified by postcode. The top of the FS has been slightly redesigned. Both 1 col and 2 col layouts available. If comments are required, use the 1 col layout (Type 2) but if there are no comments the 2 col layout (Type 1 classic) will enable much more to be printed on one page. I have left in the option to hide unused lines to save even more space.

### **Agency Postcode**

This is a new box on the Options/Supervisor/Defaults screen and only has to be set once. It is only required for the CFS

### **Saving and opening CFS files**

The nature of the FS is saved with the file and always stays with it thereafter. If you open an old style file it will still be just the same as before, the CFS files also retain the CFS system. The triggers are also saved in the file, so if the default triggers change between a particular file being saved and opened again, the old figures will be retained, however if you did want to replace the old triggers with the latest ones, the popup menu for Expenditure allows this to be done.

### **One omission (CCJ)**

The paper CFS shows a special column to indicate whether a debt is subject to a court judgement. It has not been possible to incorporate this into the CFS. If a debt has a court judgement, you should note this in the comments column...(CCJ or whatever)

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## Changing the trigger figures

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This process has been hidden in the “Supervisor only” part of PGdebt and even then I have made it difficult to change the figures by accident, requiring a user to confirm the changes by typing “yes” or the effective date in a special format, to achieve the changes. This means that changes can only be made deliberately by a person determined to do it !

The trigger figures have been agreed and are set by an agreed process. They will be reviewed from time to time and updated if necessary. All that is necessary is to update the figures is to place a special file, containing the updated information, in the PGdebt folder. This file will be available for download from various locations to be agreed. The file contains a “effective” date and it will take over automatically on that date. This is so that the file can be made available early and bureaux can incorporate it when convenient, ahead of the effective date ready for automatic take over.

It is expected the figures will also be made available in printed format so that a user who does not wish to use the ready made solution by replacing the file can update manually. It is possible to manually update the existing trigger figures file, or manually make a new file for use at a particular date in the future and save it so that it will take over automatically. This procedure will also allow errors or omissions in the ready made file to be easily corrected locally if required.

### To view the existing triggers

1. Click Options/Supervisor/triggers
2. Click “View Edit current trigger values”

They will appear, and can be edited as required.

### To save any changes as the CURRENT figures:

1. Click “Save table as current trigger values”
2. Click Yes
3. Type in “YES”
4. Type in the version number (v1...v2...v3 etc)

The figures will be saved

### To view/edit/input future trigger figures

1. Click “View/edit future trigger values”

A window with 4 choices will appear

- 1 Find if any preloaded figures are available.** This option will automatically check to see if any future triggers are pre-loaded and ready for use. If none are found this is not necessarily a fault, there may be none available because they have not been loaded yet. If you change any figures please remember to save them, see next section.
- 2 Search for the file containing the future triggers.** If you have downloaded a file containing future trigger figures, this option will bring up a dialogue box to allow you to find this file on your PC and load it. You must know the name and location of the file, of course. When you find the file its figures will be loaded into the grid and saved for future use, no further action is required unless you change anything, in which case please save the figures
- 3 Load the existing values and modify these.** This simply loads the current figures into the grid to make it easier to modify these than start with an empty grid as in the next option. Remember to save the finalised figures.
- 4 Type them in from scratch.** This empties the grid to allow you to start afresh and type in all figures, the previous option may be easier. Remember to save the finalised figures.
- 5 Do nothing**

Choose whichever method you wish and input the future values into the table.

### To save the figures for future use

1. Click “Save table as future trigger values”
2. Click OK
3. Enter the date the new figures are to start in a special format dd/mm/yyyy. (e.g. 01/01/2002)
4. Enter the new version number

The figures will be saved and will take over on the due date automatically. If the date format is wrong the process will cancel.

### PC date setting

Do not run PGdebt with an incorrect date on the PC or the wrong triggers may be used !

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# Important tips / Known problems

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## Letter Margins

The system which sets the left and right margins has changed with PG7 and 8. The effect of this is that left and right margins, (on *letters* only), may move 1/4" when the letter set up in PG5 or PG6 is used with PG7 and 8.

The solution, if this is critical, is to open the letter, adjust the margins from Letters/Page setup for letters, and then save the letter again with the same name. This only has to be done once, but it does have to be done for each standard letter. It is not possible to automate this change I am afraid which is due to a tiny bug in the way PG5 and PG6 set margins.

If you have 'right aligned' any text or parts of the address, phone no., date, etc. then please check the position of the right align tab to see that it is not now outside the margins, move it back to a position within the margins if this occurs.

## Backups

Backups made using the PG5 or PG6 internal built in backup system are not usable with PG8, please make a PG8 backup as soon as you are sure everything is working correctly, if you rely on the PG internal backup.

The new PG8 internal backup is much simpler to use and combines both system and client files.

## Reset your passwords after installation

Installing PG8 removes all previous passwords !

## Spellchecker

Some versions of PG8 have a spellchecker which underlines mis-spelt words in red. These versions will not pick up your old 'user' dictionary, you will have to re-make this in the normal course of using the program.

## Windows XP

PG8 runs perfectly on XP networks, but there are sometimes initial problems due to access rights and permissions not being correctly set. Log on as Administrator to do the installation. Refresh the desktop after installation to ensure any old icons are removed. Manually delete any unwanted icons.

Make sure the PG8 icon is available on the desktop of the user groups/individuals who will use the program and that these groups have read/write privileges for:

- The main PGdebt system folder on the local PC
- PGdebt folders and subfolders on the server which hold data and other shared information.

If you receive warning messages about 'access denied' or 'DBISAM errors', this is a good clue that the user does not have the permissions required to write to the folders mentioned above.

## Dockable Laptops

PG8 contains a system for using dockable laptop PCs both on and off your network. The laptop basically runs in the normal way on the network just as if it was a normal network workstation. If you wish to take it off the network, you close down in a particular way which copies across certain system files and a few client files for use in standalone mode. Next startup the PC will be in standalone mode and you can use it normally for PG8. When finished, close down again in a special way and the PC reconfigures for network mode and copies all important files back to the network when you next connect to the network.

The docking system has to be switched on before use for the first time.

Please see the tutorial on this subject on the PG8 CD, it is also fully explained in the help files.

## Common Financial Statement (CFS)

The CD contains a tutorial on the CFS. See also next section on p.25.

The BBA/MAT CFS is available with trigger figures built into PG8

## Word processor enhanced

Now supports headers/footers/tables/logos. Spellchecker now has autocorrect.

## Financial statements

Can now set default FS and set availability of FS types...eg CFS only etc

## Sync disc

Can now be on any removable disc, CD, zip, floppy etc

## Stats setup check

Stats setup checked regularly to pick up faults...auto corrects

## Reloading PGdebt

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Note that in general, if you decide to reload PGdebt you should do this “over the top” of the existing installation. What this means is: Do not delete anything before starting the reload.

The reason for this is to preserve all the changes and customisation made to the program whilst you have been using it. The reload will refresh all important system files whilst at the same time preserving all data, letters, statistics, creditor database and trigger figures. Reloading removes passwords, remember to reset these.

### **Known problems**

#### **Word processor**

On some PCs, with certain printers, the word processor allows words and letters to overprint at the end of the lines of letters after merging. It looks OK on screen, but the printout shows a few words or letters pushed together. The solution is to Click Options/supervisor/security and put a tick in the box labelled “Use WP simple mode”.

#### **Networks using Windows Terminal Services, Citrix, Applica etc.**

PGdebt must be installed locally on each workstation and will not run properly on networks which do not allow this. Installations outside this requirement are outside the program’s design criteria and we will not support these. Although you may be able to install the program and get it running, there is a considerable chance of data corruption and this will lead to trouble sooner or later. The only way to avoid trouble in these situations is to ensure that the program is only used by one person at a time. PGdebt is not designed for this type of network.