



Installation Instructions

Planned Giving Manager Products

Planned Giving Manager/Mini Manager/Gift Annuity Manager
Version 7.7B
Network

Planned Giving Manager (PGM) can be installed onto your local hard drive or your network. There is no special licensing for networks. If you will be using your network to run more than one copy of PGM at a time, you will need to purchase additional copy licenses for each copy that you will need. Additional copies are very affordable. Please contact our Client Services Department at 888-474-2252 or support@pgcalc.com for more information about getting additional copy licenses or if you have any problems with installing PGM.

Part A. Comparison of standard installer to alternative installer

There are two ways to install PGM, and both install the same version of the software, just using different methods. While the standard installer is more automated, the alternative installer provides more flexibility for network installs, such as being able to update a network folder without having to log directly into the server, and can also be used to work around certain standard installer error situations.

	Standard installer	Alternative installer
Technology	InstallShield	WinZip
Install location	Automatically finds folder on machine where prior version of PGM was installed (if InstallShield was used).	Must manually specify target location to install or update, if not C:\PGM default.
Desktop shortcut	Automatically creates PGM desktop shortcut.	Must manually create PGM desktop shortcut, if does not already exist.
.inp file registration	Automatically registers .inp files to open in PGM when the file is double-clicked.	Must manually associate .inp files with PGM application, if not already registered.
Files affected	Overwrites PGM application files in install folder with latest versions, but does not overwrite the pgmw32.dat configuration file and documents created by users (.inp, .doc, .xls).	Same as standard installer.

See Part B for installation instructions for the alternative WinZip installer. See Part C for instructions for IT staff on the advanced topic of doing silent installs without user input. See Part D for special situations and guidance if unsure which installer to use.

Part B. Instructions for running the alternative WinZip installer

(1) Download and run the WinZip installer from the following location:

<https://www.pgcalc.com/download/pgm77bzip.exe>

(2) If you get a blue screen with the warning, "Microsoft Defender SmartScreen prevented an unrecognized app from starting," click the *More Info* link, confirm that PG Calc Incorporated is the publisher, and click the *Run anyway* button.

(3) When you run the installer, select the target folder (by default, C:\PGM) on your local or network drive into which PGM should be installed, then choose *UnZip*.

Create PGM desktop shortcut and register the .inp PGM input file type

If you do not already have a PGM shortcut on your desktop, use Windows Explorer to go to the C:\PGM or other folder where you installed PGM, right-click on the pgmw32.exe file, choose *Send To – Desktop (create shortcut)*, and then rename the shortcut to *PGM*.

To launch PGM automatically by double-clicking on a .inp file in Windows Explorer, an email attachment, or other application such as The Raiser's Edge, you may need to register the .inp file type to open with pgmw32.exe. Right click on the start1.inp file in your PGM folder, choose *Open with*, click *Choose another app*, click *Choose an app on your PC*, browse to and select the pgmw32.exe file in the folder where you installed PGM, and click the *Always* button.

Note: Using the standard InstallShield installer will perform these steps automatically. If you already have a PGM desktop shortcut on the machine, you should not need to perform these steps again.

Check files access privileges to the PGM folder

Ordinarily the user should be given full access to the PGM folder. At a minimum, the user should be given read/write access to the following configuration files: pgmw.dat, pgmw32.dat, pgm.ini, and afr.ini. A good check is to have the user who will be running PGM log on, run PGM, change one of the settings in the Customize menu, and see if they can save that change. If you do not want to grant full access to these configuration files or this location, see the instructions below on *Moving the PGM configuration files from the PGM application folder to another location* or *Locking down changes to your PGM configuration and default settings*.

Problems opening PGM help

The PGM help system uses a .chm file and, for a network installation, by default the help file is copied to a local temp folder. This works for most network configurations but if it doesn't work for you (due to lack of privileges to the temp folder, for example), go to Customize – Setup – General and turn off the option to copy the help file to a local temp folder. Then you can either:

- (a) Copy the pgmw32.chm help file to C:\windows\help.
- (b) Specify the help file location in a registry setting.

If you use either option, you will need to recopy the pgmw32.chm help file when you install future updates. To use the registry option (b), follow the following steps:

- (1) Run regedit. (Windows XP: Choose Start – Run, then enter *regedit* and click OK; Windows Vista: Choose Start – All Programs – Accessories – Run, then enter *regedit* and click OK); Windows 7/8/10: Choose Start and enter *regedit* in search box).
- (2) In the Registry Editor window, browse to the appropriate "HTML Help" folder below.

Windows version	Registry key location
XP Vista 7 32-bit	HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\HTML Help
7 64-bit 8 10	HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\HTML Help

- (3) Right-click "HTML Help" and choose New – String Value.
- (4) Enter *pgmw32.chm* (with no quotes) as the name, double click the name (or right-click and choose Modify), and enter as the value data the path name of the folder where pgmw32.chm is stored on your local computer (e.g. C:\PGM). When done, click OK.
- (5) Pgmw32.chm should now appear among the registered help files listed in the right-hand panel of the Registry Editor window. The path for the folder where pgmw32.chm is stored will appear in the "Data" column.

- (6) Copy the pgmw32.chm from the network folder where PGM is installed to the local folder specified.
- (7) Run PGM from your network and try opening a help topic. It should open normally.
- (8) Close Regedit.

Moving the PGM configuration files from the PGM application folder to another location

Ordinarily the configuration files used by PGM are stored in the PGM application folder. While you can lock down rights to the PGM application folder for security reasons (such as in a Citrix environment) so that individual users cannot make changes, that would also prevent users from making configuration changes, including updating the IRS discount rate table with the new rate that comes out each month. To lock down rights to the PGM application folder without preventing configuration changes, you can move the PGM configuration files from the PGM folder to another location where the users would be able to modify them. Below are the steps to do that:

- (1) Create the following environment variable (through a Citrix script or autoexec.bat script). This can point to a local or network location that users have the right to modify. If you want users to share the same configuration, specify a network location. If you want each user to have their own configuration, specify a local location or individual folder on the network. For example, you might create a PGMCONFIGURATION subfolder on the C: drive of each user's machine, then set the PGMLIB environment variable as follows:

```
set PGMLIB=C:\PGMCONFIGURATION
```

- (2) Copy the following files from the PGM application folder to the new location:

- pgmw32.dat (configuration file)
- pgm.inp (optional default settings file)
- *.ini (additional configuration files pgm.ini, afr.ini, tax.ini, and optional display.ini)
- *.nar (narrative files)
- *.gar (gift annuity rate table files)
- wget.exe, libeay32.dll, libiconv2.dll, libintl3.dll, libssl32.dll (for automatic IRS discount rate update)

Locking down changes to your PGM configuration and default settings

You may wish to lock down your PGM configuration and default settings so that individual users cannot make changes to these files. If you do, you should make provisions for the monthly change needed when each new IRS discount rate is issued. The two files that control configuration and default settings are located in the PGM application folder:

- pgmw32.dat – contains your configuration settings
- pgm.inp – contains default inputs when you launch PGM (optional)

There are two methods to limit changes to these two files:

- (1) Right click on the file in Windows Explorer and choose Properties – check the Read Only box. To make changes, such as when the new IRS discount rate comes out each month, go back and uncheck this box, make your changes in PGM and save, then go back and check this box again.
- (2) Have your IT department set up a Windows security group for people who will be denied access. On the Properties screen, click on the Security tab, then remove the Modify and Write rights for that group. Leave the person you have designated to make monthly or periodic changes out of that group. If that person still has modify and write access, they should be able to make changes on an ongoing basis without having to modify the file properties each time.

Note that individual users with read only rights can still make configuration changes in PGM. These changes will only apply to that person's PGM session, and will be discarded when the user exits PGM.

Part C. Install PGM in silent mode with no input from end user

Two methods are available to do a silent install, which some IT departments find useful as an advanced way to install PGM using scripts that require no input from the end user. This can be helpful if the IT department has a large number of machines to update or maintains standard desktop configurations which they may need to reinstall or reimage automatically from time to time.

Method 1 using standard InstallShield Installer

The standard InstallShield Installer can be run in silent mode using an .iss file. We have created 3 .iss files designed to perform a fresh install for a new machine or new user, an update install to an existing PGM installation, and an uninstallation:

- (1) Download pgm77b.exe from <https://www.pgcalc.com/download/pgm77b.exe> and save to a location such as X:\folder
- (2) Download the <https://www.pgcalc.com/download/pgm77bsilent.zip> to X:\folder and unzip.
- (3) Run the desired command:

Action	Command
Install PGM the first time	X:\folder\pgm77b.exe /s /f1X:\folder\newinstall.iss To specify a target folder other than C:\PGM, edit the "szDir=C:\PGM" line in the file newinstall.iss.
Update a previous version of PGM	X:\folder\pgm77b.exe /s /f1X:\folder\update.iss
Uninstall PGM	X:\folder\pgm77b.exe /uninst /s /f1X:\folder\uninstall.iss
Create your own script file	X:\folder\pgm77b.exe /r A setup.iss file will be created in the "C:\Windows" folder, which you can then copy to X:\folder and use X:\folder\pgm77b.exe /s /f1X:\folder\setup.iss

More information on command line arguments can be found on the [InstallShield website](#).

Method 2 using WinZip alternate network installer

The WinZip alternate network installer (<https://www.pgcalc.com/download/pgm77bzip.exe>) can be run on an automated basis using the command:

```
X:\folder\pgm77bzip.exe /auto X:\targetfolder
```

If you omit X:\targetfolder in the above command, PGM will be installed to the default C:\PGM location.

Part D. Considerations for choosing a local versus network configuration

- A local install gives you access to PGM even when your network connection is unavailable, such as when taking a laptop home or on the road.
- A local install automatically creates a desktop shortcut for PGM and registers the .inp file type to open in PGM, which must be done manually for a shared network install.
- A network install means you only have to install updates in one location, rather than on each computer running PGM.
- A network install shares a common PGM configuration with all users, but that means users cannot set up an individualized configuration for themselves.
- A network install means input files are saved by default into a shared network folder, but that can also be done with a local install.

Choose the type of install and configuration below that is most appropriate for your needs.

Local install of PGM using standard InstallShield installer

This is recommended for most people. Simply follow the standard install instructions using the standard InstallShield download at: <https://marketing.pgcalc.com/pgm-77b-downld>. If you have a license for multiple copies of PGM, do a local install on each machine.

Local install of PGM application with data on network

This enables you to have your application and configuration files installed locally, but have files created by PGM automatically saved by default to a network location. First, follow the standard install instructions using the standard InstallShield download at: <https://marketing.pgcalc.com/pgm-77b-downld>. Second, launch PGM, open the *Customize - Setup* menu, choose *File Open/Save Location*, and pick the network folder where you want to save your files. If you have a license for multiple copies of PGM, installation and configuration will need to be done on each machine.

Local install of PGM using alternative WinZip installer

Sometimes the standard InstallShield installer will give errors caused by things such as interference by virus protection software or inadequate privileges to create directories, copy files, or make changes to the registry. It's best to call our Client Services Department for help resolving these errors and then use the standard InstallShield installer as described above. In rare instances, you may need to use the alternative WinZip installer for PGM. First, follow the *Instructions for running the alternative WinZip installer* below to install PGM to C:\PGM or another location on your local drive. After installation, follow the directions below to *Create PGM desktop shortcut and register the .inp PGM input file type*.

Network install of PGM using standard InstallShield installer

This is the simplest way to install PGM on a network. Pick one of the machines that will be running PGM to be the primary machine. On the primary machine, follow the standard install instructions using the standard InstallShield download at: <https://marketing.pgcalc.com/pgm-77b-downld>. When asked for the location to install PGM, click the *Change* button and select the network folder where you want to install PGM instead of the default C:\PGM location. When you do subsequent updates, remember to install PGM from the same primary machine. The PGM install program will remember and update the network location. Note: if you have already installed PGM locally on a machine, you will need to either uninstall before doing the network install or choose a different machine to use as your primary machine.

If you have a license for multiple copies of PGM, you do not need to run the installer again on the additional machines. Instead, make note of the network location to which you installed PGM, go to each of the machines, and follow the directions below to *Create PGM desktop shortcut and register the .inp PGM input file type*.

Note: If you uninstall PGM from the primary machine using *Control Panel – Add/Remove Programs*, PGM will be removed from the network folder. You should also delete the PGM shortcut from all of the other machines.

Network install of PGM using alternative WinZip installer

In some instances you may not be able to use a primary machine to install PGM with the standard InstallShield installer. If that is your situation, you may need to use the alternative WinZip installer for PGM. First, follow the *Instructions for running the alternative WinZip installer* below to install PGM to the network folder where you want

PGM to reside. This can be done once from any machine. If you have a license for multiple copies of PGM, you do not need to run the installer again on the additional machines. Go to each machine and follow the directions below to *Create PGM desktop shortcut and register the .inp PGM input file type*.

Network install of PGM for Citrix and Terminal Services

Some organizations use Citrix and/or Terminal Services to manage application use and have installed PGM successfully on these platforms. PGM only needs to be installed once on the Citrix/Terminal Services server. This can be done using either the standard InstallShield installer or the alternative WinZip installer. Typically a Citrix/Terminal Services expert at your organization will do the install and additional configuration that are needed. While PG Calc is not able to provide Citrix/Terminal Services help and does not officially support PGM on Citrix/Terminal Services, we are happy to work directly with your Citrix/Terminal Services experts if they have questions. As with other network installs, you will need an additional copy license for each user who may run PGM at the same time.