

Eze EMS

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Installation and Troubleshooting Guide

This document describes how to install and troubleshoot Eze EMS.



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Content

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SS&C Eze

<http://www.ezesoft.com/>

Documentation Conventions

The following standard conventions are used in our documentation to draw your attention to specific aspects of the functionality described.



Note: A Note highlights important information that, if not seen, may negatively affect or impede your use of a given feature. Information can also provide additional context to better understand the functionality.



Warning: A Warning calls out actions that may result in loss of data or other catastrophic system damage.

System Requirements

The following system requirements are recommended to ensure optimal performance of Eze EMS:

- **Supported OS:** Microsoft® Windows 10 or later.
- **Hardware:** Eze EMS runs on commercially available PC hardware; the best available configuration with 8+ GB RAM is recommended.
- **Broadband Connection:** Use a broadband connection with consistent ping times less than 200 ms. Standard bandwidth recommendation is 5 Eze EMS installations per T1 (T1 = 1.5 Mbps).



Note: To ensure an optimal performance environment for Eze EMS, install all critical updates and security patches for Microsoft Windows before downloading Eze EMS.

Installing Eze EMS

Eze EMS currently offers both 32-bit and 64-bit versions when downloading the software. This section explains how to download a single version (i.e., 32-bit or 64-bit) for the first time.



Warning: If you are installing 64-bit Eze EMS, and have previously had 32-bit Eze EMS installed, you need to back up your page files and uninstall the 32-bit Eze EMS. Refer to [Upgrading Eze EMS](#) for more information.



Note: Before installing Eze EMS, make sure you have full system administrative privileges, including read-write control of the installation folder.



Note: You cannot be running any SS&C Eze or third-party applications while installing Eze EMS. Close all applications before beginning installation.

To install Eze EMS:

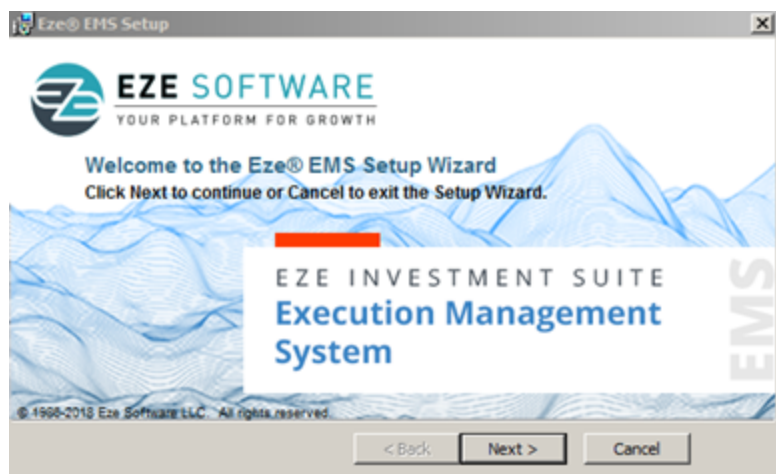
1. For 32-bit Eze EMS, navigate to: <https://www.ezesoft.com/downloads/download-ems>.

For 64-bit Eze EMS, navigate to the download link provided by your SS&C Eze client service representative.

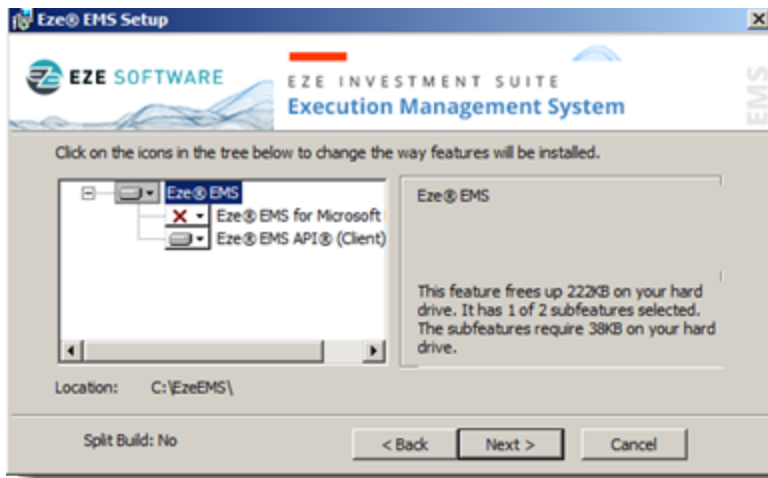


Note: If you have not received a download link for 64-bit Eze EMS, contact your SS&C Eze client service representative.

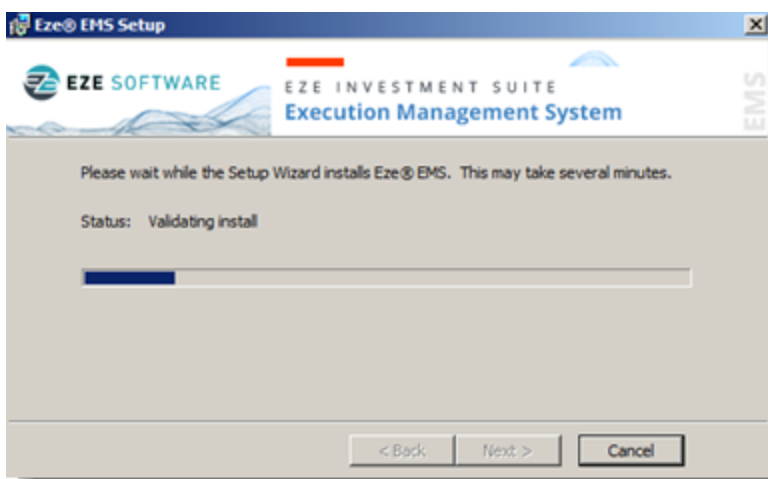
2. Click the appropriate download link (**Cloud Download** or **FTP Download**) under the **Current Release** heading.
3. Save the .msi file to your system and run the installation program. The Eze EMS Setup window appears, shown below.



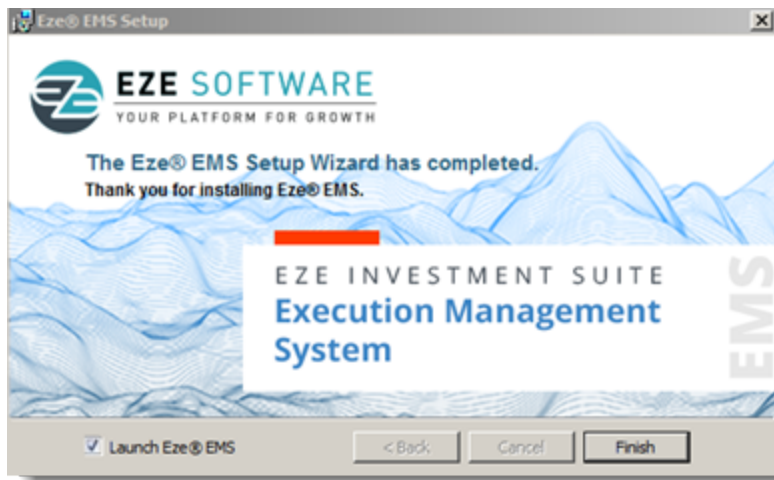
4. Click **Next**. The Custom Setup window appears, shown below. Use this window to determine how the different features are installed on your system.



5. Select one of the following from the installation settings drop-down list for the components you want to install:
 - Install the component on your computer’s hard drive.
 - Install the component and all related features on your computer’s hard drive.
 - Install the feature only when installation is required (e.g., when you want to use the component).
6. Click **Next**. The Ready to Install window appears.
7. Click **Install**. The Installation Progress window appears, shown below.



- When the installation **Status** is **Complete**, the Installation Summary window appears, shown below.



- Select the **Launch Eze EMS** checkbox to open Eze EMS after the window closes, and then click **Finish**.

Upgrading Eze EMS

If you have previously installed Eze EMS, you can choose to upgrade the software when a new version is released.



Note: Before installing Eze EMS, make sure you have full system administrative privileges, including read-write control of the installation folder.



Note: You cannot be running any SS&C Eze or third-party applications while installing Eze EMS. Close all applications before beginning installation.

This section explains:

- [Upgrading 32-bit Eze EMS](#)
- [Upgrading from 32-bit to 64-bit Eze EMS](#)

Upgrading 32-bit Eze EMS

When upgrading 32-bit Eze EMS, it is recommended that you back up your page files and uninstall the current version of Eze EMS. Once this is complete, follow the steps outlined in [Installing Eze EMS](#).

Upgrading from 32-bit to 64-bit Eze EMS

To upgrade to 64-bit Eze EMS:

1. Backup your page files so you do not lose your customized setups.
2. Uninstall the current version of Eze EMS.



Note: You need to uninstall the current version of Eze EMS before you can begin installing 64-bit Eze EMS.

3. Navigate to the download link provided by your SS&C Eze client service representative.



Note: If you have not received a download link for 64-bit Eze EMS, contact your SS&C Eze client service representative.

4. Click the appropriate download link (**Cloud Download** or **FTP Download**) under the **Current Release** heading, and proceed to follow steps 3 through 9 from the [Installing Eze EMS](#) section of this guide.

Installing 64-bit Eze EMS with 32-bit Fallback

Eze EMS provides the ability to install both 64-bit and 32-bit Eze EMS, allowing you to fallback on the 32-bit version if needed.



Note: Before installing Eze EMS, make sure you have full system administrative privileges, including read-write control of the installation folder.



Note: You cannot be running any SS&C Eze or third-party applications while installing Eze EMS. Close all applications before beginning installation.

To install both 64-bit and 32-bit Eze EMS:

1. Ensure your system is running the most recent version of the 32-bit Eze EMS. If it is not, navigate to: <https://www.ezesoft.com/downloads/download-ems> and download the Eze EMS version under the **Current Release** heading.



Note: It is recommended that you back up your page files and uninstall the existing version of Eze EMS before upgrading to the newest version. For more information on installing Eze EMS, refer to [Installing Eze EMS](#).

2. Once you have the newest version of 32-bit Eze EMS installed, navigate to the download link for 64-bit Eze EMS provided by your SS&C Eze client service representative.



Note: If you have not received a download link for 64-bit Eze EMS, contact your SS&C Eze client service representative.

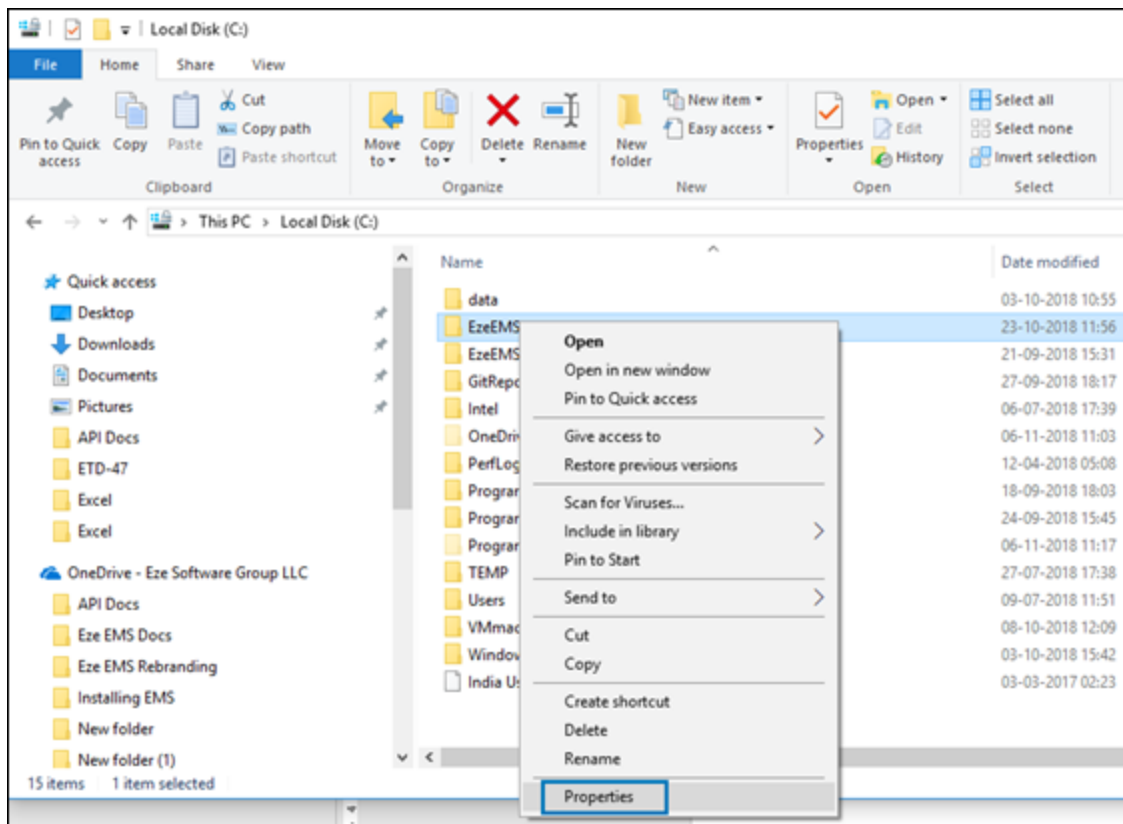
3. Click the appropriate download link (**Cloud Download** or **FTP Download**) under the **Current Release** heading, and proceed to follow steps 3 through 9 from the Installing Eze EMS section of this guide.

Assigning Full Access Privileges

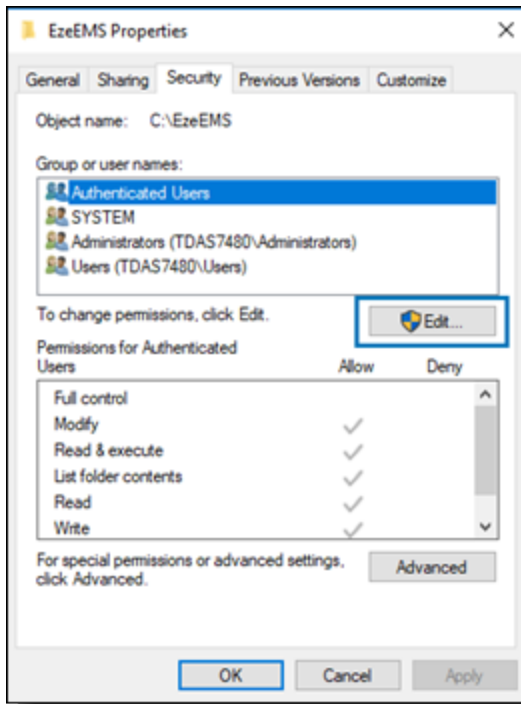
After you have installed Eze EMS, perform the following steps to ensure you have full access rights to the C:\EzeEMS folder.

To assign full access privileges:

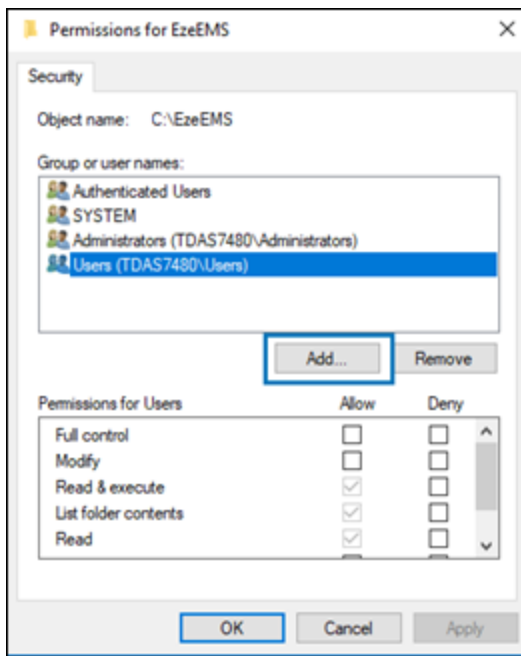
1. Navigate to your computer's C:\ drive, right-click the **EzeEMS** folder, and then click **Properties**, as shown below.



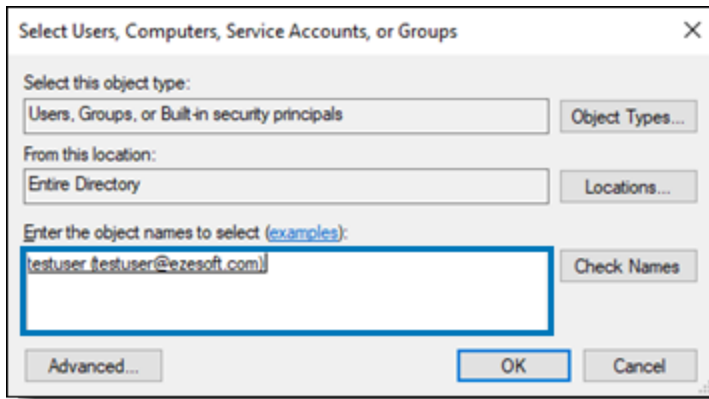
- In the EzeEMS Properties window, go to the **Security** tab, and then click **Edit...**, as shown below.



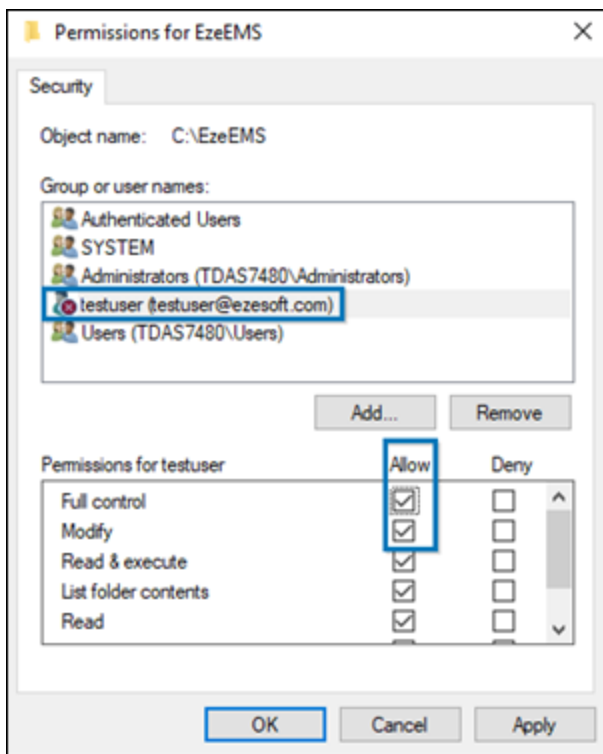
- In the Permissions for EzeEMS window, click **Add...**, as shown below.



- In the **Enter the object names to select** field, type the desired email address, as shown below. Then click **OK**.



- In the Permissions for EzeEMS window, select the newly added email ID, and then select the **Allow** checkbox for **Full control** and **Modify**, as shown below. Then, click **OK**.



Troubleshooting Your Eze EMS Installation

The following tables describes common troubleshooting procedures for an Eze EMS Installation.

Eze EMS Installer Runs Instead of Eze EMS Application	
Issue	After you have installed Eze EMS, the Eze EMS installer runs when you first click the Eze EMS icon.
Reason	A third-party application was running while the Eze EMS installer was running.
Solution	Shut down all applications and run the repair option in the installer. Reboot the machine.

Install Failed Error Appears When Launching Eze EMS	
Issue	Upon launching Eze EMS, you receive an error message that states: <i>The Install failed</i> . Then another message appears: <i>tal/registry-request-failed</i> .
Reason	You do not have rights to access the registry.
Solution	You need read access to a specific registry key. The Windows Administrator must perform this change.

Eze EMS Client Service Information

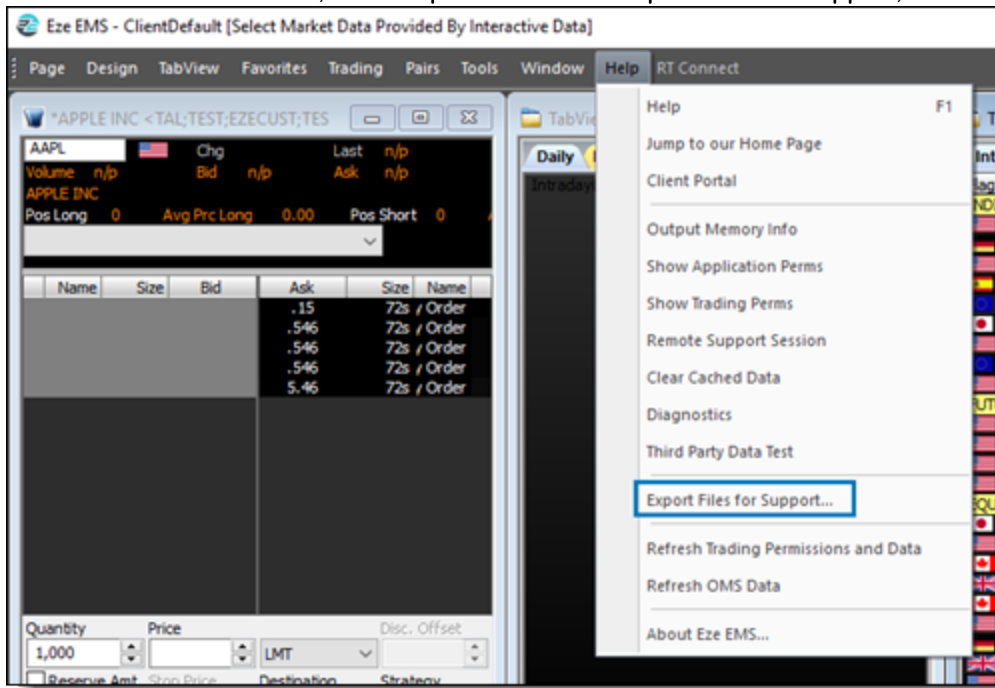
For support inquiries related to Eze EMS, contact your SS&C Eze client service representative and be prepared to supply the information listed below. Note that space has been provided for you to record the requested information.

EMS Username:	
EMS Domain:	
EMS Locale:	
First and Last Name:	
Firm Name (Buy Side or Sell Side Name):	

In addition, Eze EMS allows you to create and send a zip file to your SS&C Eze client service representative that contains screen shots of the issue and system logs.

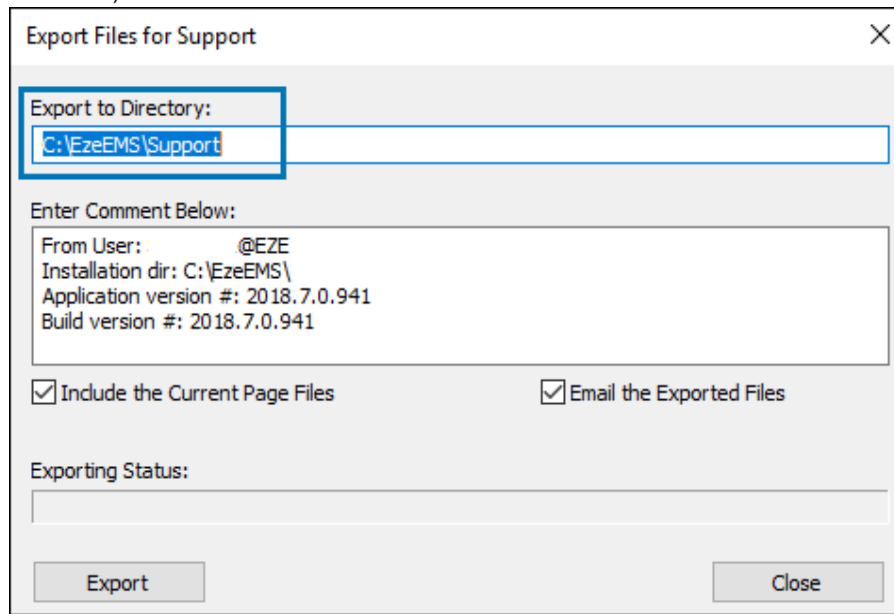
To create and send a zip file to your SS&C Eze client service representative:

1. From the Eze EMS window, click **Help** and then click **Export Files for Support**, as shown below.



The Export Files for Support window appears.

2. In the Export Files for Support window:
 - a. In the **Export to Directory:** text box, enter the path where you want the exported files to be saved, as shown below.



- b. Ensure that the **Email the Exported Files** checkbox is selected.
 - c. Click **Export**.
3. A new message window addressed to SS&C Eze client services (EZE-ClientServices@sscinc.com) appears for your email client (e.g., Microsoft Outlook) with the exported files attached. Include your Eze EMS Username, Domain, and Locale in the body of the email along with your First and Last Name and Firm Name.
4. Send the email with the support files to SS&C Eze client services.

Configuring Eze EMS to Pass Through a Firewall

Eze EMS uses port 80, 443, and 1838. If you are going through a firewall, these ports need to be open for outbound TCP connections only.

If you are also using an HTTP proxy server, port 80 and 443 traffic from Eze EMS will use your network settings (Internet Explorer browser), although Eze EMS does not support authentication on HTTP proxies. Port 1838 traffic should be configured to go directly through the firewall to the static IP subnets listed in the [Static IP Address List for Eze EMS Traffic](#) section of this guide.

Static IP Address List for Eze EMS Traffic

North America

- 63.75.60.0/22
- 63.160.212.0/23
- 63.160.214.0/24
- 63.215.120.0/25
- 198.207.140.0/24

Europe

- 193.201.255.0/24

Domain Whitelisting

IP subnets used by Eze EMS must be whitelisted at the firewall level and in some cases proxy server level. This can also be done by domain name:

- *.taltrade.com
- *.realtick.com
- *.ezesoft.com
- *.ezesoft.eu