

Eze EMS

Installation and Troubleshooting Guide

This document describes how to install and troubleshoot Eze EMS.



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SS&C Eze

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

Eze EMS Installation and Troubleshooting Guide

Eze EMS Installation Overview

This guide describes how to install and troubleshoot Eze EMS, including:

- [System Requirements](#)
- [Installing Eze EMS](#)
- [Upgrading Eze EMS](#)
- [Troubleshooting Your Eze EMS Installation](#)
- [Configuring Eze EMS to Pass Through a Firewall](#)
- [Static IP Address List for Eze EMS Traffic](#)
- [Eze EMS Client Services Information](#)

System Requirements

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

- **Supported OS:** Microsoft® Windows 7, Windows 8, and Windows 10.
- **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).



Windows patches and all current critical updates from Microsoft are required to ensure optimal performance with Eze EMS. Please visit: <http://windows.microsoft.com/en-us/windows-vista/install-windows-updates>.

Installing Eze EMS



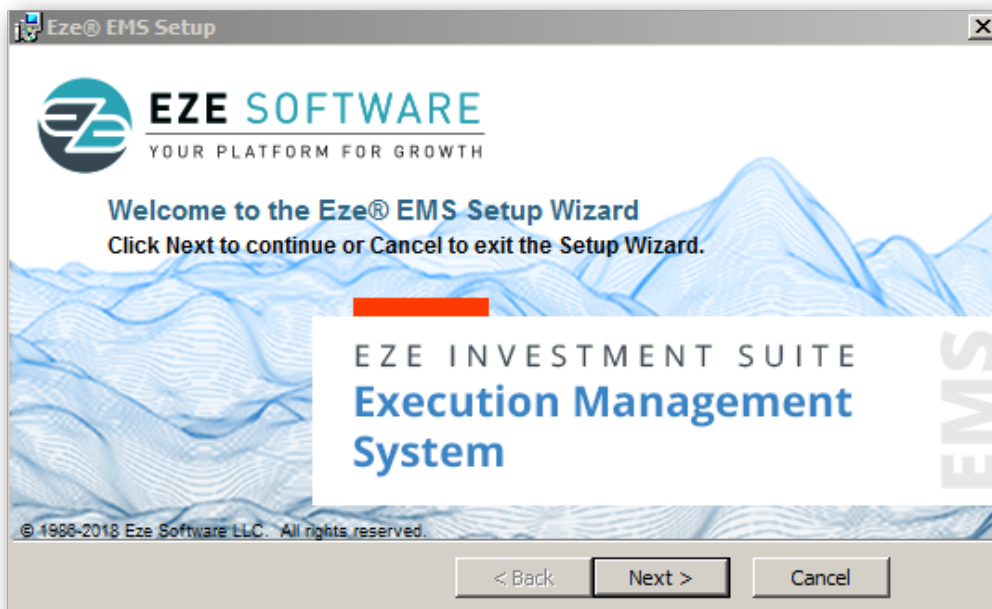
Before installing Eze EMS, make sure you have **FULL SYSTEM ADMINISTRATOR PRIVILEGES**, including read-write control of the installation folder.



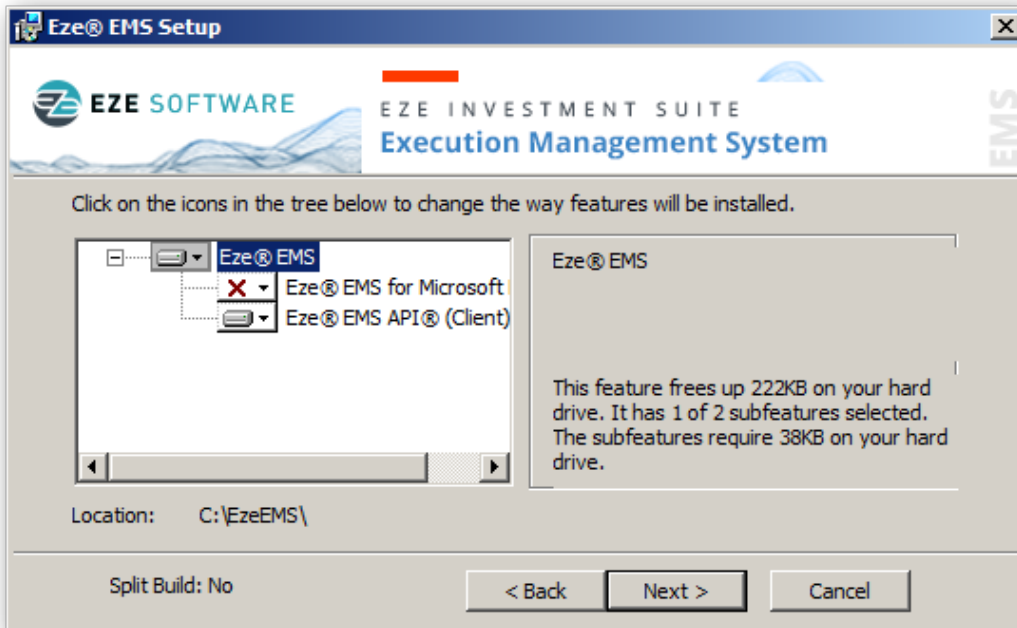
Before installing Eze EMS, close all applications currently running on your system. No EzeSoft or third-party applications should be running while you install Eze EMS.

To install Eze EMS:

1. Browse to <https://www.ezesoft.com/downloads/download-ems> and click the Eze EMS version you want to download under the **Current Release** heading.
2. Click **Cloud Download** for the version of Eze EMS you want to install.
3. Save the .msi file to your system and run the installation program.
4. The Eze EMS Setup window appears, as shown below.



5. Click **Next**. The Custom Setup window appears, as shown below.

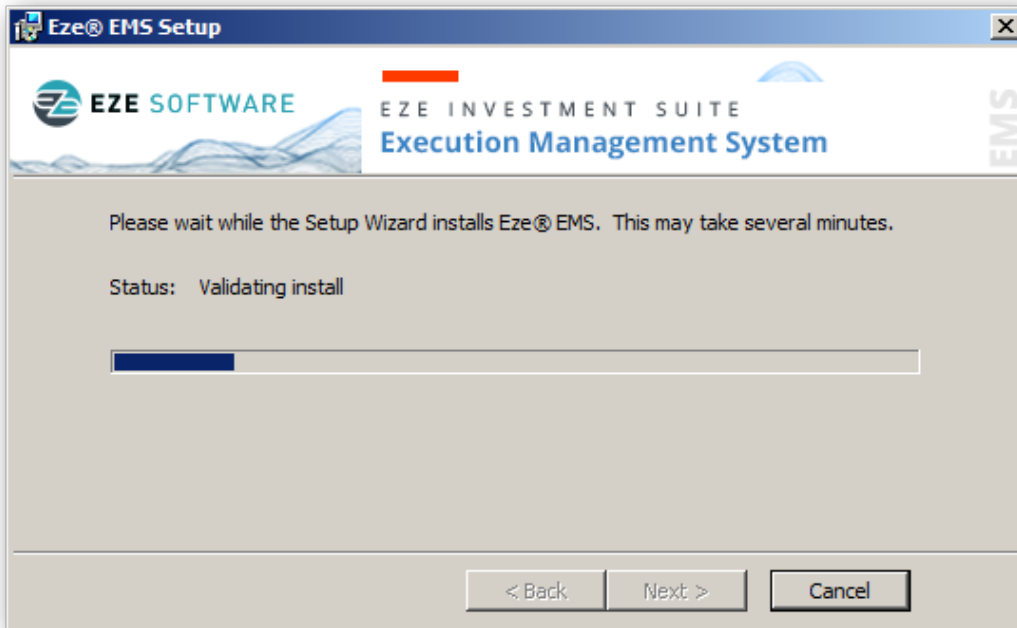


6. Select one of the following from the installation settings drop-down menu for the components you want to install:

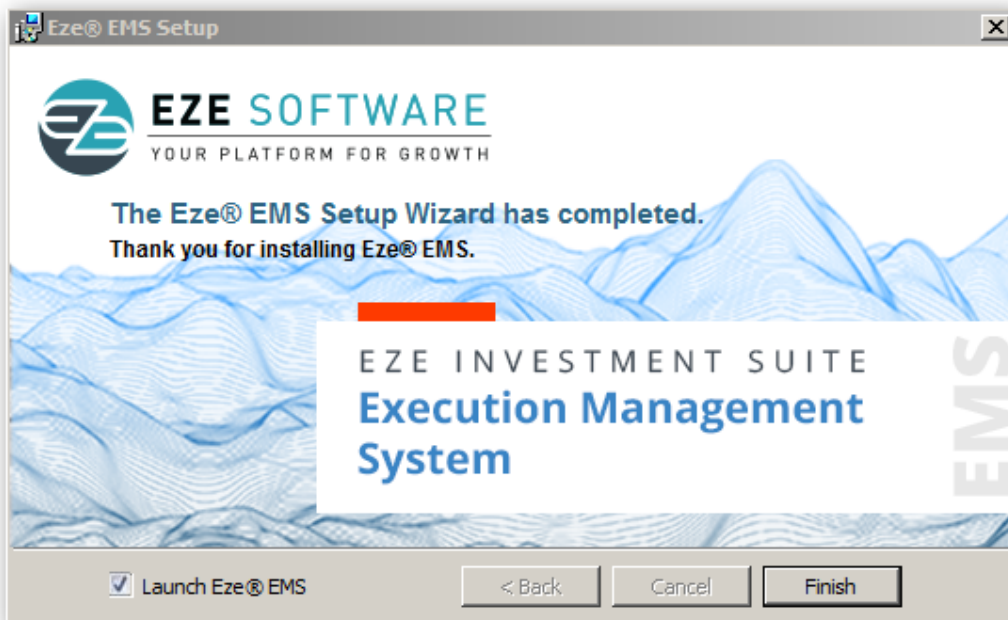
- Install the component on your computer's hard drive.
- Install the component and all related features on your computer's hard drive.
- Install the feature only when installation is required (e.g. when you want to use the component).
- Do not install the feature.

7. Click **Next**. The Ready to Install window appears.

- Click **Install**. The Installation Progress window opens, as shown below.



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

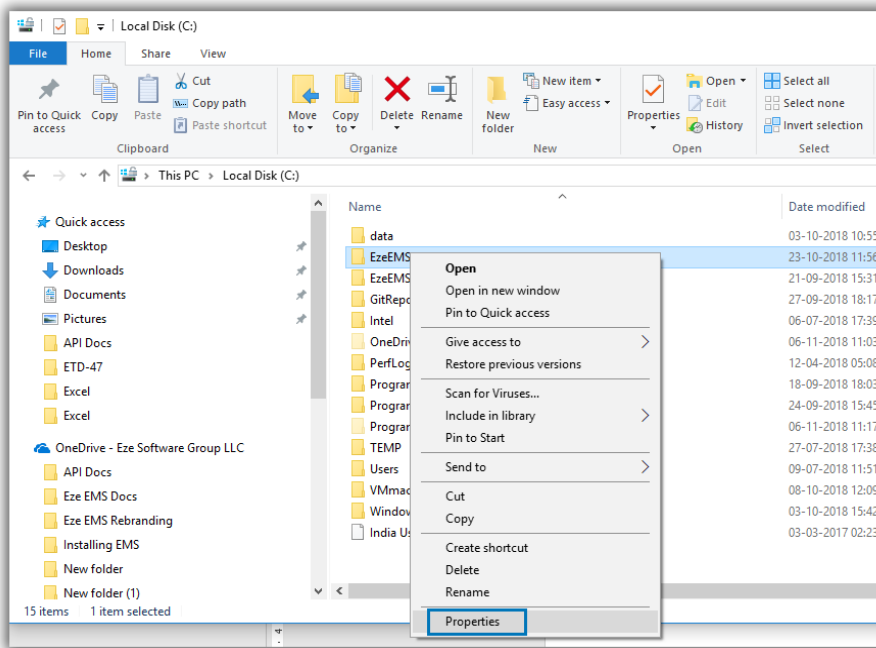


- Select **Launch Eze EMS** to open Eze EMS after the window closes. Click **Finish**.

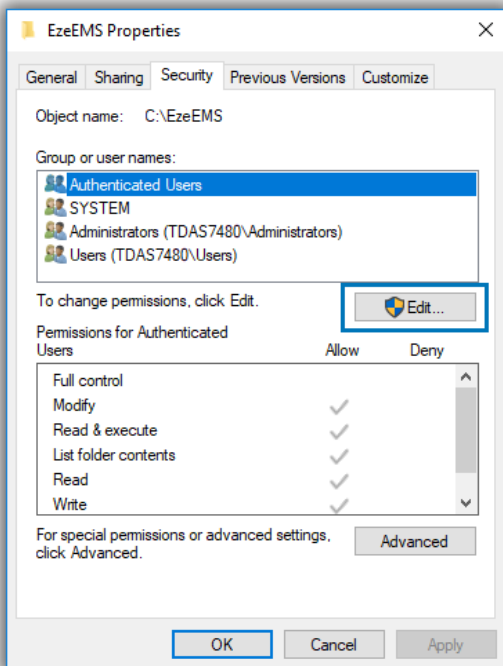
Assigning Full Access Privileges

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

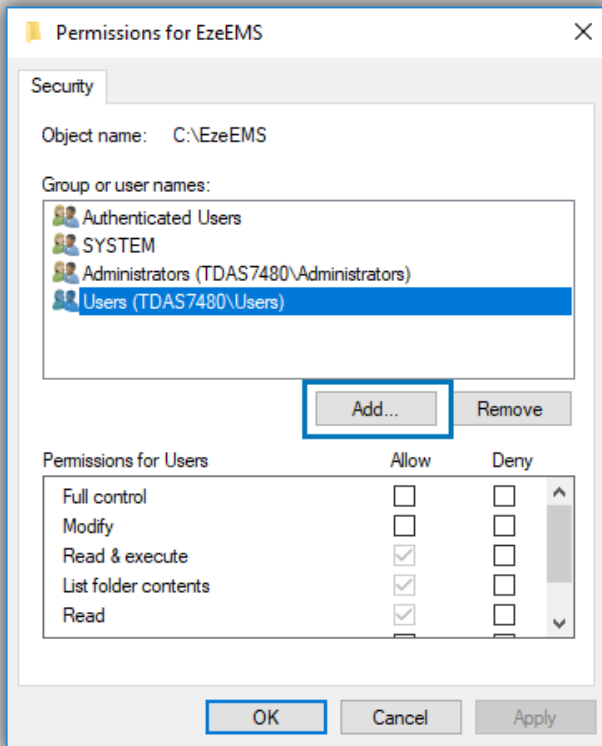
1. Go to **C** drive, right-click the **Eze EMS** folder, and then click **Properties**, as shown below.



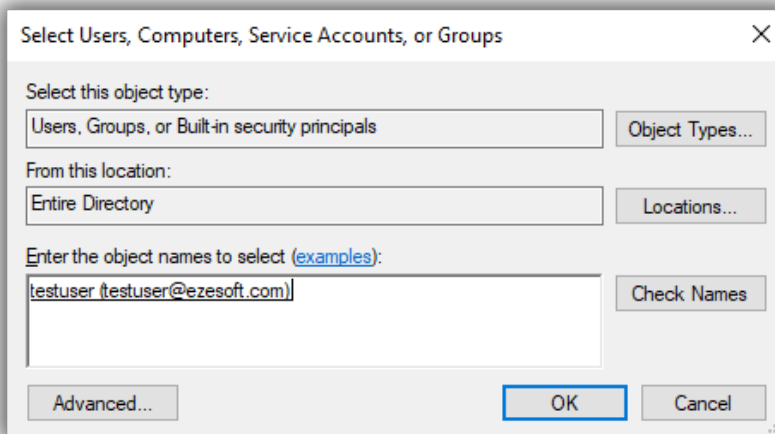
2. In the EzeEMS Properties window, go to the **Security** tab, and then click **Edit**, as shown below.



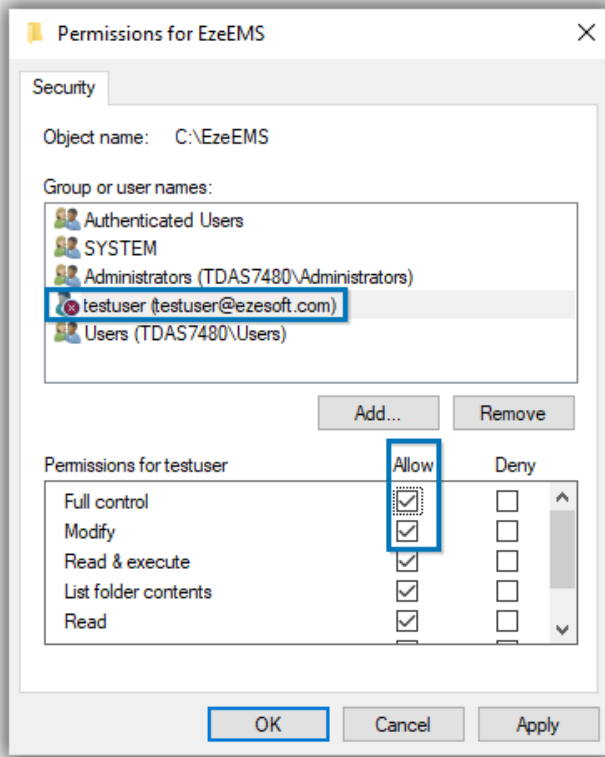
3. In the Permissions for EzeEMS window, click **Add**, as shown below.



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



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



Upgrading Eze EMS

Upgrade installation steps are the same as the standard installation procedure. See [Installing Eze EMS](#) for more information.

Troubleshooting Your Eze EMS Installation

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

Installation Troubleshooting Procedures — Issue #1	
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.

Installation Troubleshooting Procedures — Issue #2	
Issue	Upon launching Eze EMS, you receive an error message that states "The Install failed." Then another message appears: "tal/registry-request-failed."
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.

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 below.

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

Eze EMS Client Service Information

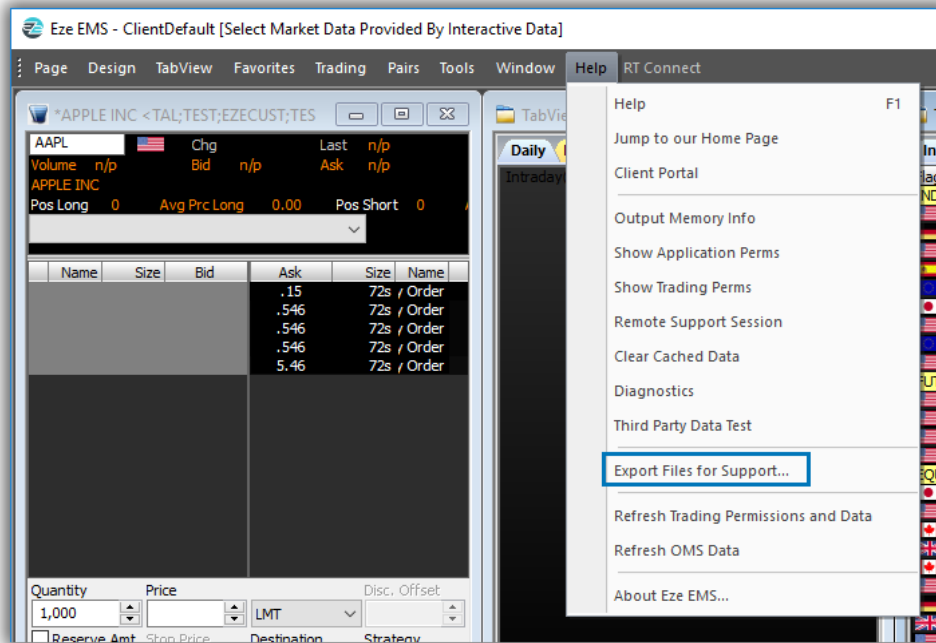
For support inquires related to Eze EMS, contact your Eze client service representative and be prepared to supply the information listed below. Note that space has been provided for you to record the requested information.

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

Also, follow the steps below to use the **Export Files for Support** feature to create and send a zip file to your client service representative that contains screen shots of the issue and system logs.

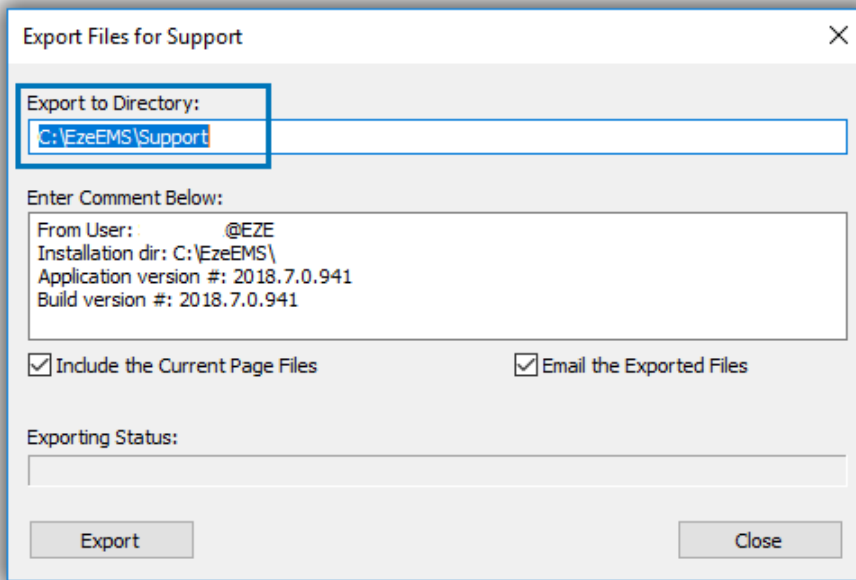
To export and send files to your Eze EMS client service representative:

1. From the Product... 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 **Email the Exported Files** is selected.
 - c. Click **Export**. The email window with the support files attached and addressed to support services appears.
3. Send the email with the support files via your email client such as Microsoft Outlook, as shown below.

