

EazyEFT Installation Guide #4

Last updated 14 March 2022

Introduction

EazyEFT can be installed on a standalone machine to which no one else will have access, or it can be installed on a network server and accessed from multiple client machines. You **CANNOT** install two separate copies of EazyEFT on two separate machines pointing to two separate data files. This is prohibited by the terms of the [Software License Agreement](#)

This guide will explain how to move EazyEFT from an existing server to a new server (e.g. migrate to new server). If you require a different type of installation then please select a different guide from our [Installation Guides](#)

If you are unsure which type of installation is best for your organisation, then please contact our Customer Helpline number above and we can advise accordingly.

Steps Involved

In order to successfully move EazyEFT from one server to another, there are five essential steps that need to be carried out in sequence, as follows :-

- 1) Disable EazyEFT on the existing server.
- 2) Install EazyEFT on the new server.
- 3) Copy your existing data file from the existing server to the new server.
- 4) Reconfigure existing client machines to point to the new server.
- 5) Uninstall EazyEFT from the existing server.

You **CANNOT** simply copy the EazyEFT folder from the existing server to the new server. This will **NOT** work. You must follow each of these five steps as outlined in detail below.

Requirements

Before you proceed, it is advisable that you download the latest version v3.0.0.0 of the EazyEFT installation program from our [Downloads Page](#). When downloading, if you are prompted to 'Run' or 'Save' we would advise that you choose 'Save', as you will use this same installation program to do the initial install on the server and then to do the client install on each required client machine.

You will also need a USB key, an external hard disk or some other mechanism of copying the data file from the existing machine to the server.

Before you start, you should run EazyEFT on an existing client machine and go into Payments >> Files Created. When you click on 'Go' all the previously created files will be listed. Make a note of the 'Internal Reference' of the most recent file. We will use this later to check that you have successfully copied across the existing data.

Transfer File Type	Transaction Type	Internal Reference	Requested Date	Business To Business	File Creation Date	Number Of Transactions	Value Of Transactions
SEPA XML File	Debits	5000093	07/09/2016	<input type="checkbox"/>	02/09/2016 13:47	1	10.00
SEPA XML File	Debits	5000092	11/08/2016	<input type="checkbox"/>	03/08/2016 10:19	1	10.00
SEPA XML File	Credits	5000091	25/07/2016	<input type="checkbox"/>	25/07/2016 12:57	2	25.00

Also go into Set Up >> Company Maintenance and make a note of the output folder. You will need to move this folder and all its contents to a corresponding folder/share on the new server.

Company Maintenance	
Company Name	Lir Software
Output Folder	C:\Sepa
Only Create Files In This Folder	<input type="checkbox"/>
UMR Handling	Allow System to Generate UMRs (Recommended)
Debits File Type	SEPA PAIN.008 XML File
Credits File Type	SEPA PAIN.001 XML File
Default Bank Account	[None]

Prerequisites

Before EazyEFT can be installed on a machine, 'Microsoft .Net Framework 4.8' and 'Crystal Reports Runtime' must also be installed. If you are running Windows 10 / Windows Server 2012 or later, then 'Microsoft .Net Framework 4.8' will be installed already as part of the operating system. 'Crystal Reports Runtime' may or may not be installed already, depending on what other applications you have previously installed on the machine. The EazyEFT installation program will automatically detect if either of these two prerequisites are not installed and will guide you to the relevant download for each, if required.

Step 1 - Disable EazyEFT On Existing Server

- 1.1) To ensure that none of your users inadvertently log into EazyEFT while you are migrating servers you should first disable EazyEFT on the existing server.
- 1.2) First ensure ALL your users have exited out of EazyEFT.

1.3) Now go into Control Panel >> Administrative Tools >> Services on the existing server.

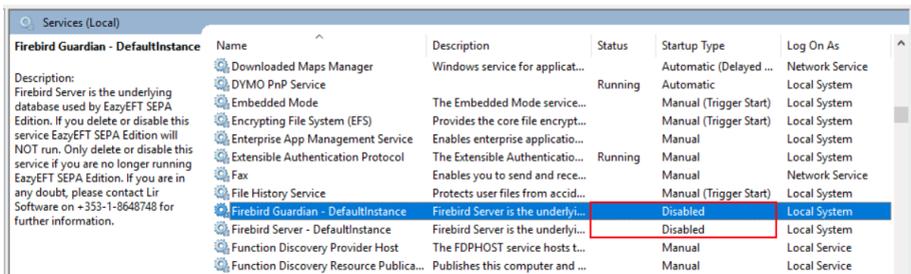
1.4) Scroll down through the list of services until you see Firebird Guardian

1.5) Right click on the Firebird Guardian service and select 'Stop'. This should also stop the Firebird Server service directly underneath.

1.6) Right click again on the Firebird Guardian service and select 'Properties', set the 'Startup Type' to 'Disabled' and click 'OK'

1.7) Now highlight the Firebird Server service, as before right click and select 'Properties', and again set the 'Startup Type' to 'Disabled' and click 'OK'

1.8) The status of both services should be blank and the startup type should be disabled, as shown below :-

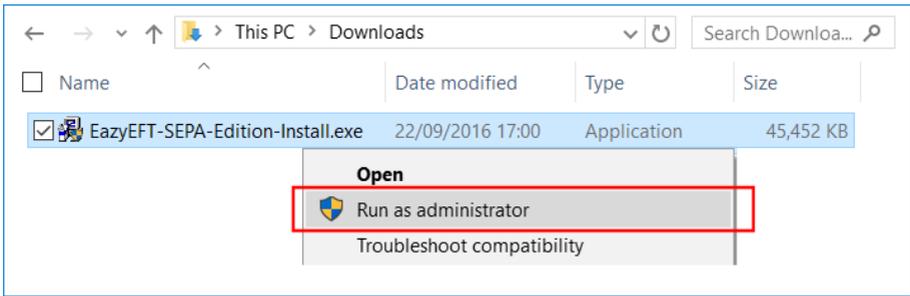


1.9) If you now try and run EazyEFT on an existing client machine, you should get an error. This is to be expected and you are now ready to proceed to step 2.

Step 2 - Installing EazyEFT On New Server

2.1) First ensure that you are logged into the new server as the Domain Administrator (or the local machine Administrator). The install must be run on the new server itself. Running the install on a client machine and pointing it to a mapped network drive or a network share will NOT work.

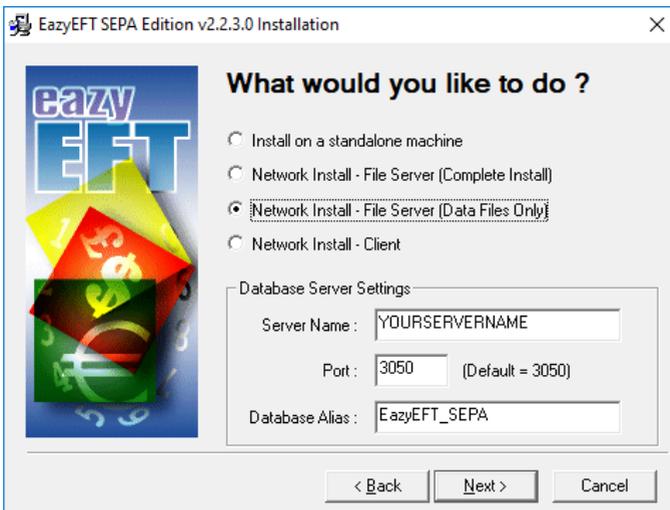
2.2) Right click on EazyEFT-SEPA-Edition-Install.exe and select 'Run as administrator' (as shown below). If prompted by User Account Control, click 'Yes' to allow the installation program to run with full administrator permissions.



2.3) The 'Welcome' screen should now be displayed. Click on 'Next'.

2.4) Read the terms of the software license agreement. If you agree, click on 'I Agree'.

2.5) When prompted 'What would you like to do?', you now have to choose between a 'Complete Install' or the recommended 'Data Files Only' install (as explained below).



Network Install - File Server (Data Files Only) : For the vast majority of our customers, this would be the preferred option. EazyEFT will never actually be run on the server itself. Only the data file will be installed on the server, and it can then be accessed from any number of client machines.

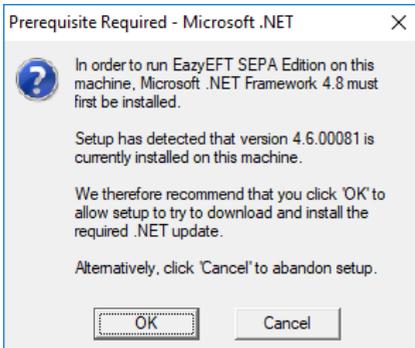
Network Install - File Server (Complete Install) : You really only need to select this option if your users are going to be logging into, and running EazyEFT from, the server itself (e.g. Remote Desktop, Terminal Services, Citrix etc.). If your users are never going to log into the server itself then you should choose the 'Data Files Only' option instead.

Once you have decided on your type of install, make a note of the 'Server Name' displayed. You will need this name later when you go to install EazyEFT on each of your

client machines.

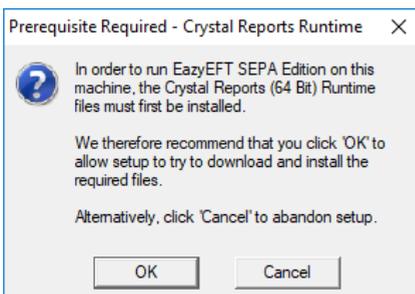
Unless otherwise advised by Lir Software, do not change the default 'Database Server Settings'. If you selected 'Data Files Only' click on 'Next' and proceed directly to step 2.9, otherwise click on 'Next' and continue to step 2.6.

2.6) At this stage the installation program will check if the two prerequisites mentioned above are installed. If a message similar to the one below appears, then this means that the first prerequisite, 'Microsoft .Net Framework 4.8', is not installed on this machine. If this message is not displayed, proceed directly to step 2.7 below.



By clicking on 'OK' the EazyEFT installation program will begin to download and automatically install the 'Microsoft .Net Framework 4.8' from the Microsoft website. This may take a few minutes so please be patient. Once 'Microsoft .Net Framework 4.8' is installed, the EazyEFT installation program will automatically proceed to step 2.7.

2.7) If a message similar to the one below appears, then this means that the second prerequisite, the required 'Crystal Reports Runtime' files are not installed on this machine. If this message is not displayed, proceed directly to step 2.8 below.



By clicking on 'OK' the EazyEFT installation program will begin to download and automatically install the 'Crystal Reports Runtime' installation program. This may take a few minutes so please be patient. Once the 'Crystal Reports Runtime' files have been installed, the EazyEFT installation program will automatically proceed to step 2.8.

2.8) If the select 'Destination Folder' screen is displayed (as shown below), then this means that the two prerequisites are in fact installed and the EazyEFT installation program can continue, so just click on 'Next' to accept the default destination folder.



2.9) When prompted to select 'Data File Folder' we strongly advise that you leave the default data folder as is. The EazyEFT data file does NOT need to be (nor should it be) installed to a mapped network drive or a network share. In fact each client machine (and hence your users) do not even need to know where the data file is actually located, so just click on 'Next' to accept the default folder.

2.10) If you selected 'Complete Install', click on 'Next' to accept the default 'Program Manager Group' of EazyEFT SEPA Edition.

2.11) When prompted with 'Start Installation', click on 'Next'.

2.12) When 'Installation Complete' is displayed, click on 'Finish'.

2.13) If you selected 'Data Files Only' proceed directly to step 3 below. If you selected 'Complete Install', you should now be able to run and log in to EazyEFT by clicking on the EazyEFT SEPA Edition icon on your desktop.

2.14) Please bear in mind that we haven't copied across the existing data yet, so for the moment this is a new blank database. So when prompted, enter the default 'User Name' and 'Password' that were provided in the confirmation email that you should have received after you downloaded the EazyEFT installation program. Your existing logon credentials will, almost certainly, NOT work just yet.

2.15) When you run EazyEFT for the very first time it will need to build the database and do some initial configuration. Just click on 'OK' when prompted.

2.16) When the EazyEFT 'Main Menu' and 'Home Screen' are displayed, then you have successfully installed EazyEFT on the server, albeit that you have a blank database.

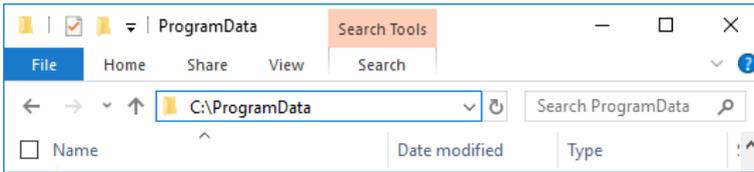
2.17) At this point you need to exit completely out of EazyEFT in order to copy across the existing data.

Step 3 - Copy Existing EazyEFT Data File To New Server

The next step is to copy all your existing data from the existing server to the new server. All your EazyEFT data is contained in a single database file called **EazyEFT.SepaEdition.Data.fdb** and by default this file will be in a 'C:\ProgramData\Lir Software\EazyEFT SEPA Edition\DataFiles' folder on the existing server.

Important : The folder you are looking for is '**C:\ProgramData**' which is completely different to 'C:\Program Files'.

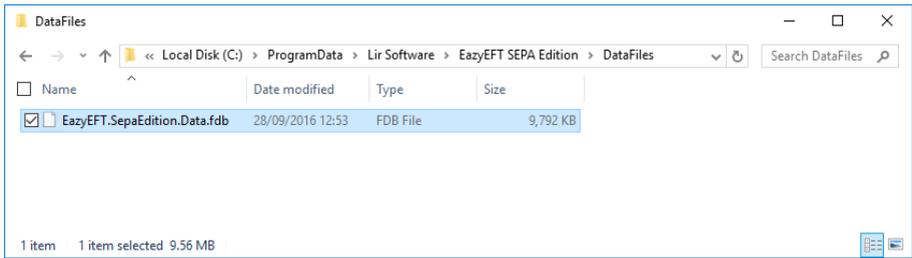
The 'C:\ProgramData' folder is normally hidden and may not be visible when you try to browse all the folders on your C: drive. If this is the case then simply type 'C:\ProgramData' in to the top of the Windows Explorer address bar (as shown below) to show the contents of this hidden folder.



Important : Before you can copy your data, you need to exit completely out of EazyEFT if you haven't done so already on the new server.

Once you have exited out of EazyEFT on the existing server and browsed to the appropriate 'DataFiles' folder, you can now copy the **EazyEFT.SepaEdition.Data.fdb** file from the existing server to a USB key or to an external hard disk. It is also a good idea at this point to make a note of the size of your existing data file.

Once the file has been copied, unplug the USB key (or external hard disk) from the existing server and plug it into the new server. If you browse to the 'C:\ProgramData\Lir Software\EazyEFT SEPA Edition\DataFiles' folder on the new server you should see an EazyEFT.SepaEdition.Data.fdb already in this folder. This is the new blank database that was installed by step 2 above and it should be about 9-10 MB in size (as shown below).



Delete this file and copy the data file from the USB key (or external hard disk) into this same folder. Once copied on, check the file size now displayed. It should be bigger than 10 MB and should match the file size that you noted from the existing server (above).

Important : Do not copy the data file from the USB key to your 'C:\Program Files\Lir Software' folder, or to any other folder on your server for that matter. This will not work. It must be copied to the exact same folder that contains the new blank database as installed by step 2 above.

To check that the existing data has been copied across successfully proceed to step 4.

Step 4 - Reconfigure Client Machines

As before, if you try and run EazyEFT on an existing client machine, you should get an error. This is to be expected as the client machine is still pointing at the existing server (which is currently disabled).

In order to repoint a client machine to the new server you need to edit the **EazyEFT.SepaEdition.ini** file on the client machine.

By default this file will be in the 'C:\Program Files\Lir Software\EazyEFT SEPA Edition' folder.

However on some older installations there may not be a 'C:\Program Files\Lir Software' folder and this file may be in the 'C:\Program Files (x86)\Lir Software\EazyEFT SEPA Edition' folder instead.

Important : Because of the default security permissions on the 'Program Files' folder on Windows 7 and greater, you will NOT be able to edit this file just by double clicking on it. The file will open, but you will not have permission to save.

The easiest way around this is to copy the existing EazyEFT.SepaEdition.ini file to a temporary folder (e.g. C:\temp), double click on it to open it with Notepad, make the necessary changes, save, and then copy the file back into the EazyEFT SEPA Edition folder.

Alternatively you can open Notepad using the 'Run as administrator' option, and then use File >> Open to select the file directly from the folder.

Once you have opened the file in Notepad, edit the line that says `ServerName=xxxxxxx` to reflect the new server name that you noted at step 2.5 above. Save the file and exit Notepad.

At this point you should now be able to run EazyEFT on the client machine and log in using the same 'User Name' and 'Password' that you would have used previously on the old server.

To check that your data has been copied across successfully, go into Maintenance >> Customers (or Suppliers) and check that all your Customers (or Suppliers) are listed.

Next go into Payments >> Files Created and click on 'Go' and make sure that all your previously created files are listed. The 'Internal Reference' of the most recent file displayed should match the 'Internal Reference' that you noted from the Requirements section at the start of this document.

Now that you can see your existing data on the new server, you need to check that you have access to your 'Output Folder'. To do this go into Set Up >> Company Maintenance.

If the output folder is a local folder as shown above (i.e. starts with C:\), then please note that this is **NOT** recommended for a client / server type installation. Instead you should use a shared folder on your new server (e.g. '\\yourservername\company shared folder\SEPA'). That way, regardless of who creates the file on whatever machine, the file will always be created in (and uploaded from) the same place.

You can click the 'Test' button, to check that the specified folder does in fact exist and that you have the required access rights to the specified folder.

Repeat step 4 for ALL your existing client machines.

When all your client machines have been reconfigured and can log in and see the data on the new server, you are then ready to proceed to step 5.

Step 5 - Uninstall EazyEFT From Existing Server

At this point it is recommended that you uninstall EazyEFT from the existing server. There are two main reasons for doing this :-

Firstly, and as mentioned previously, you cannot have separate client machines pointing to separate data files on separate servers. This is prohibited by the terms of the [software license agreement](#).

Secondly, and more importantly, the creation of SEPA compliant XML files requires that every file contains a unique file number, that every batch within a file contains a unique batch number and that every transaction within a batch contains a unique transaction number. Creating files from separate machines pointing to separate data files cannot guarantee this uniqueness, and almost certainly will cause random transactions and/or complete files to be periodically rejected inexplicably by your bank.

Please see [Uninstalling EazyEFT](#) for full step by step instructions on how to uninstall EazyEFT from the existing server.

If having followed the above steps and you are still having an issue installing EazyEFT, then please contact our Customer Helpline number above.