



## EBMS Upgrade Instructions:

1. Create a **backup** copy of your EBMS files and disable all automated backup software and **antivirus** software. If you need help with a backup, go to [www.EagleBusinessSoftware.com/UpgradeHelp](http://www.EagleBusinessSoftware.com/UpgradeHelp) and click on Backup.
2. EBMS Upgrades will be completed by you unless you've arranged for Eagle to run the upgrade for you as a billable service or you are an EBMS Plus client.
3. Make sure all Windows Updates are done on the Server and the Workstations. This includes the latest Microsoft .NET Framework installed as well. Admin privileges will be needed to complete these actions.
  - a. The server and workstations may have to have several rounds of updates installed including reboots in between some updates.
    - i. After updates are installed and the machines have rebooted, continue to check for updates until Windows reports that all updates have been installed.
  - b. We recommend that you restart your server and each workstation once more before doing the upgrade. The upgrade will begin with your server.
4. Log into EBMS as an administrator and run File Maintenance utilities. If you need help running utilities, go to [www.EagleBusinessSoftware.com/UpgradeHelp](http://www.EagleBusinessSoftware.com/UpgradeHelp) and click on **Utilities**. All users must be logged out of EBMS on your server and all workstations and stay logged out until the upgrade is complete! This includes all third-party software that connects to EBMS data must also be shut down. (ex. UPS WorldShip).
  - a. If you encounter utility errors, please contact [Support@EagleBusinessSoftware.com](mailto:Support@EagleBusinessSoftware.com) with details of the error before proceeding with the upgrade
5. On the EBMS data server (computer where the data is stored), log in as a Windows administrator.
6. If the Server is on EBMS Version 8.1.227 or higher, the upgrade will be pushed to your EBMS Server Manager program. If you have entered your administrator email in the Notification section of the EBMS Server Manager you should receive an email when the update has been downloaded. First install on your EBMS data server and run by clicking "Run EBMS Update" within the EBMS Server Manager. After the EBMS program has been installed on the server you will be prompted to upgrade your data sets.
  - a. **Please Note: Some data updates can be lengthy depending on the size of your company files, what version you are updating from/to and your computer age.**
  - b. When the data is finished updating, run all utilities again (see #4 above).
7. EBMS needs to be installed/updated on all workstations to update the local program files. Since you were on EBMS 8.1.227 or newer prior to running this upgrade, you will simply login to EBMS and you should be prompted to update. The workstations will look for the EBMS installation files in a shared "ClientInstaller" folder on your server. E.g. \\[servername]\ClientInstaller. You can access the setup.exe file there if you need to manually initiate the installation.
8. During the install if you get error messages "[FileName].DLL is not registered" you should see a "retry" and "ignore". Hit the "ignore" button for all of the errors. When it is done installing. Click "finish". Go back to step 7 and manually run "Setup.exe" again and you should get a "Repair" option

instead of the "Install" option. Select the "Repair" and this should fix the problem. If it does not, call EBMS Support for assistance. 717-442-3247 #2.

9. If you have any customizations or custom reports, test them **immediately** to make sure they work. Sometimes there are data changes that affect reports, and they need to be updated. Upgrades to custom scripts and reports are not reverse compatible and will result in a nominal fee to upgrade.
10. To import updated reports (if necessary)
  - a. Open the EBMS database you wish to import the report to
  - b. Go to the File menu in the top left corner of EBMS and then go down to Reports
  - c. Navigate to where the report is located (example: a custom invoice is probably located in Reports > Sales > Invoices/Sales Orders)
  - d. Click "New Report"
  - e. Navigate to where you saved the updated report and double click on it
  - f. When prompted with "Do you want to overwrite this report?" click Yes.
  - g. Test print the report to verify it works
  - h. Repeat steps #10c – 10g for each report you need to import into the same company dataset
  - i. Repeat steps #10a – 10g for each company dataset that needs to have new reports imported.
11. Please dispose of any DVD's, Old Installers, or Emails you may have received with older versions of EBMS.

For Technical Support, contact Eagle Solutions at 717.442.3247 Ext. 2.

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**REMINDER: Accounting files should be stored on a reliable backup regularly!**

In the past there have been companies who have experienced total data loss because of hardware failure. Please check your backup system periodically to ensure it is working properly.

Eagle Business Software is not responsible for lost data due to backup failures.

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