

Migration of Handisoft

<https://www.zones.sagehandisoft.com.au/kb//article.php?id=253>

Migrating HandiSoft programs to a new server

This article sets out some important points to note when migrating HandiSoft programs to a new server.

Before migrating HandiSoft to a new server

- Make a **suitable working backup** copy of the current HSoft Folder.

Note: SQL version requires the HandiSoft SQL database to be backed up as well.

- Make a note of the current location of Document Manager.

In Practice Manager, from the Options menu, click Document Manager and check the location of Docbase folder

During Migration

1. Copy HSoft folder across to the new location. For example c:HSoft.
2. For the SQL version only, ensure that Hssql.ini file in the HSoft / Apps folder points to the new server and has the correct SA password.
3. From the Sage HandiSoft website: [Updates](#) run the most recent Full Version followed by the upgrades to the new location.

After Migration

1. Change prefill path in HandiTax:

In **HandiTax**, from the **Options** menu, click **Tax Form Options**, and under the **Prefill Report** section **Delete** the pre-existing path, and replace it with the new one. Leave blank for Default settings. Click **Ok**.

HandiSoft

Tax Form Options

Tax Agent Reference: HANDISOFT SOFTWARE TESTER 00013-000

Automatic

- ☐ Print preview
- ☒ Update status
- ☒ Ask status
- ☐ On selection tag client
- ☒ Day time phone no
- ☒ Mobile phone no
- ☒ Email address
- ☒ Display schedule information
- ☒ Use validation reports to update status

Printing ATO Labels (Client Copy Only)

☐ 0% ☐ 33% ☐ 66% ☒ 100% **B**

☐ Print Data within Tax Returns in bold

☒ Custom client copy options **Custom**

Signature/Detailed footer **Never**

Reference/Custom

- ☐ Lodge only when ready
- ☐ Custom estimate options **Edit**
- ☐ Print PAYG Instalments on estimate
- ☐ Print warnings
- ☒ Rental summary in worksheet copy
- ☐ Edit in logical order
- ☒ Use Report Navigator after ELS session

ELS Declaration ☐ Include amounts ☐ Incl. EFT Acc details

☒ Show 2014 details in Tax Form Summary

- ☐ Also show 2013 details
- ☐ Highlight where > **10** % change

☒ Print amendment comparison

Default

- ☒ Send by ELS
- ☐ Brief entry
- ☐ Client fee

Form type **I Form**

Initial status **Not started**

Partner

Manager

Staff

Office

Prefill Report

Path **G:\Hsoft\Doc\Portal**

OK **Cancel**

Note: This setting is user and program specific and will need to be applied to all active users in the current and all the prior year versions of HandiTax.

2. (SQL Version Only) In HandiRegister, from the **Options** menu, click **EDGE Setup**, click **EDGE Details**. Adjust the **EDGE Folder** path at the top to point to the correct and existing path.

EDGE Communication Options

EDGE Folder **G:\HSoftware\Apps\Edge**

EDGE Lodgment Details - 27/01/2016

EDGE Folder:

OK **Cancel**

HandiSoft

3. (SQL Version Only) In **HandiTax**, from the **Options** menu, click **ELS Communications**. Adjust the ELS Folder path at the bottom to point to the correct and existing path.

The screenshot shows the 'ELS Options' dialog box. The 'ELS Folder' field at the bottom is highlighted with a red rectangle, displaying the path 'G:\HSOFT\ELS\'. The dialog includes the following sections:

- Registration:** ELS approval number (12345), Office of Lodgment (BRI Brisbane), Test Lodgment checkbox.
- Dial IP:** User Id (D12345), Password (masked).
- ATO Access Codes for VPN:** Code 1 (V12345), Code 2 (masked).
- ELS Password:** New ELS Password, Current ELS Password (masked), Changed At (8:22), On (27/01/2016), No change, Update expired password, Fix mistake if pwd has exp.
- Primary CEG:** ADE, BRI (selected), MEL, SYD, Specia.
- ELS User Id:** A12345, Changed At (8:23), On (27/01/2016), Show Passwords checkbox, Advanced button.

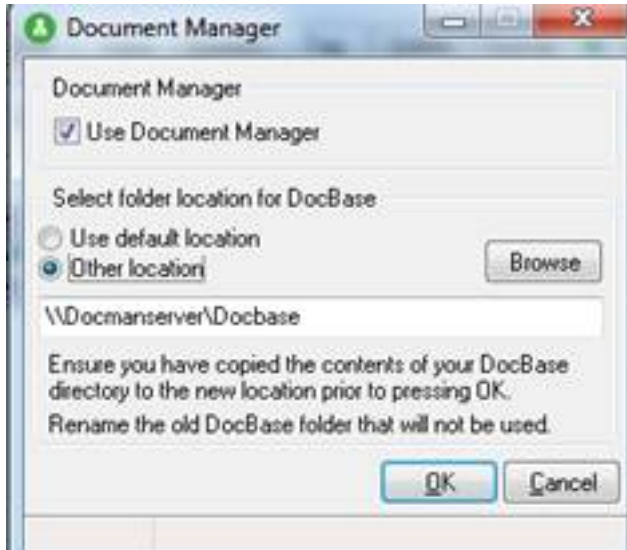
4. Ensure the HandiSoft shortcuts icons on all workstation are redirected to the new server.
5. Ensure that the HSoft folder is not being "real time" scanned by the antivirus (add to exclusion option).
6. Check the correct NTFS and Share permissions are given to all users to access the HSoft folder.
7. (SQL Version Only) Rename the HsoftAppsHsSql.ini file. Next Startup will configure HandiSoft again. (Will need SA password)
8. Check that the location of the Docbase folder is valid (refer to the section:

HandiSoft

Before migrating to a new server, above).

In **Practice Manager**, from the **Options** menu, click **Document Manager** and check the location of Docbase folder.

9. If "**Use Default Location**" is selected - no changes are needed. However, if "Other location" was selected then, ensure it is the correct location for your current docbase folder.



10. Check all users have access to the document templates created in Document Manager.

11. Please refer to the following Microsoft support knowledge base article if your Word templates are slow to open after migration: While the article refers specifically to Word 2002 and / or Word 2003, it is applicable to all versions of Microsoft Word.

<http://support.microsoft.com/kb/830561>

12. If using the HandiConnect Service refer to the article on how to start the service [here](#)

Unique solution ID: #1019

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