



Upgrade Instructions



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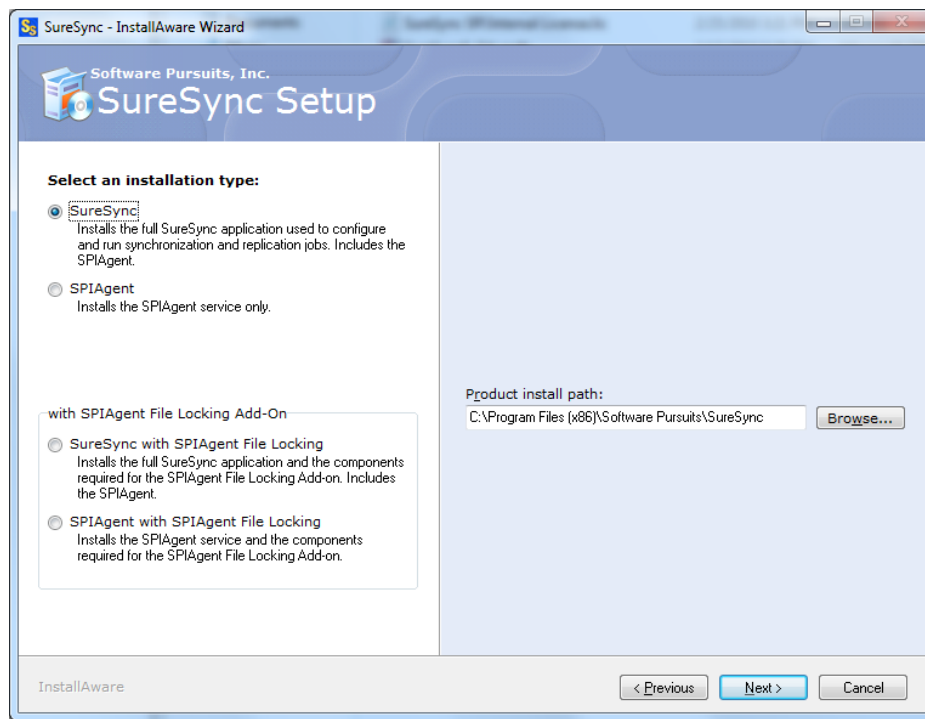
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Introduction

This document outlines the process of upgrading from all previous versions of SureSync to the current SureSync 6 release. Please follow the steps in this document carefully to ensure an easy upgrade of SureSync.

SureSync 6 introduces a new consolidated installer. This single installer can install SureSync, the SPIAgent and the SPIAgent File Locking Add-On components. This is accomplished by selecting an installation type on the panel shown below. For example, to install the SPIAgent only on a machine you would select the “SPIAgent” option. This greatly simplifies the installation process.



System Requirements for SureSync 6

SureSync's basic operating system and hardware requirements are:

- **Supported Operating Systems:** Windows Server 2008 R2; Windows Server 2008; Windows Server 2003 R2; Windows Server 2003; Windows 7; Windows Vista; Windows XP
- **Processor:** 400Mhz Pentium Processor or equivalent (Minimum); 1 Ghz Pentium Processor or equivalent (Recommended)
- **RAM (total for system):** 256MB (Minimum); 1GB (Recommended)
- **Hard Disk:** 30MB for application files; 20MB+ for database
- **Display:** 800x600, 256 colors (Minimum); 1024x768 high color, 32-bit (Recommended)

SureSync is a 32-bit application but will run on 64-bit versions of Windows. 64-bit editions of Windows include full featured emulation for running 32-bit code which allows SureSync to run on these operating systems. The SPIAgent File Locking Add-on is 64-bit compatible.

SureSync can synchronize data to operating systems such as Windows 95, Windows 98, Windows NT 4.0, Windows 2000, and non-Windows machines such as Macintosh and Linux machines via UNC path but the software itself must be installed on one of the supported operating systems listed above.

SureSync requires a database which is used to store configuration information. The following formats are supported:

- Microsoft Access (default)
- MSDE 2000 / SQL Express 2005 / SQL Express 2008
- SQL Server 2000 / SQL Server 2005 / SQL Server 2008

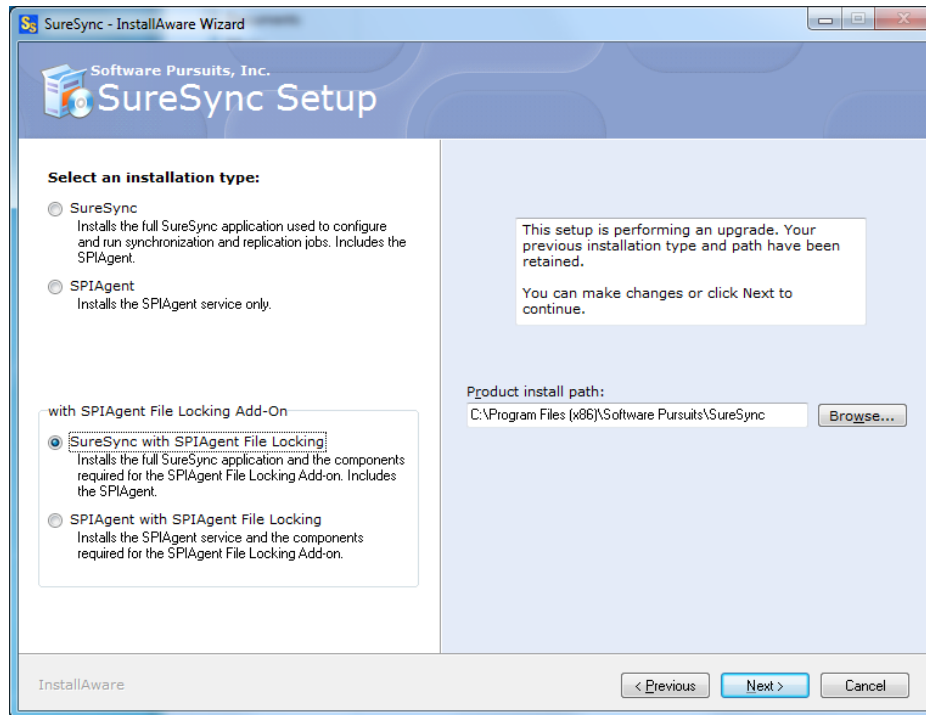
A SQL database is strongly recommended for setups using multi-directional rule types, environments with more than 50 Relations defined, or environments where hundreds of thousands of files will be processed to achieve optimal performance.

SureSync requires a number of Microsoft components to be installed on the system. The SureSync installer will inspect your system for these components and offer to upgrade or install them as needed.

- Microsoft .NET Framework 3.5 with Service Pack 1
- Microsoft MDAC 2.8 Refresh with Service Pack 1
- Microsoft Visual C++ Runtime 9.0 with Service Pack 1
- Microsoft Windows Installer 3.1
- Microsoft XML Parser 6.0
- Microsoft Jet 4.0 with Service Pack 8

Upgrading to a Newer Version of SureSync 6

1. Download the latest build of SureSync 6 (SureSyncSetup.exe) by clicking [here](#).
2. On the main SureSync machine where the full application is installed, stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab for each job to prevent them from launching until the upgrade is complete.
3. Close SureSync.
4. There is no need to stop any SureSync related services; the installer will do that for you.
5. Launch the SureSync installer (SureSyncSetup.exe) and follow the on-screen instructions. The first step will remove the old build. Your database and all of your settings will be maintained.
6. Once the old build has been removed, the setup interface will launch for the new build. Follow the on-screen prompts. When you get to the "Select an installation type" panel, the installer will have automatically selected the installation type and installation path that was previously on the machine. Continue clicking "Next" through the installer until the installation process begins.



7. On any SPIAgent machines, run the installer and follow the prompts. The old SPIAgent will be removed and the new one installed.
8. Launch SureSync on the main machine. If you had a Scheduler service installed (almost all installations do), you will be prompted to reinstall the Scheduler. This must be done to allow Schedules and Real-Time Monitors to launch at the correct times.
9. Start your Schedules and Real-Time Monitors to resume synchronization using the new version.

Important Notes for Upgrading from Previous Versions

SureSync 6 is a major upgrade to SureSync that features some significant internal architectural changes to the synchronization engine. Careful planning and consideration of the upgrade process helps ensure a smooth upgrade. Please review this section for important information that should be considered while planning your upgrade.

SPIAgent Compatibility

The 6.x version of the SPIAgent is not compatible with the SPIAgent from versions 4.x or 5.x. If your environment includes many SPIAgent machines, this is something that must be carefully considered. If upgrading all the machines at once is not possible, a staged upgrade could be needed.

A staged upgrade requires careful review of your environment. You cannot synchronize to one machine using both the 5.x and 6.x versions of the SPIAgent. If all of the machines in your environment synchronize with each other using the SPIAgent then a staged upgrade is not possible and all must be upgraded together. However, if you have sets of machines that synchronize together then you can break the upgrade into stages. For example, if ServerA, ServerB and ServerC synchronize together then those could be upgraded and the synchronization jobs between ServerD, ServerE and ServerF can be left on SureSync 5.x until

time permits upgrading them as well. In this scenario, you would need to designate a second machine as the new SureSync 6.x console or move the SureSync 5.x console to another machine. SureSync 6.x and SureSync 5.x cannot co-exist on the same machine.

Update Deployment Methods

The remote SPIAgent machines cannot be upgraded using the Deploy Updates button in Tools | SPIAgent Setup or using the SyncCmd /U operand. These tools are provided to aide in upgrading minor releases only (such as from 6.0.14 to 6.0.15). When performing a major upgrade (such as from 5.0.36 to 6.0.15) you must run the installer on each machine.

Microsoft Prerequisites

SureSync leverages current Microsoft technologies that could be missing from your machines if those machines are not patched regularly. Please see the system requirements earlier in this document for the required prerequisites. The installer will automatically download missing prerequisites and install them for you. However, running Windows Update on all machines involved prior to upgrading can get these components installed as well. Applying all pending updates through Windows Update ahead of time can result in a faster and smoother upgrade.

Remote Installation Utility

With SureSync 6.x, Software Pursuits has introduced the Remote Installation Utility which can aide in deploying the new version to multiple machines. This utility can only be used to deploy to machines that can be accessed via UNC path. The installation of the SPIAgent File Locking Add-on components is not supported with this utility at this time. Additional information about the Remote Installation Utility can be found in the SureSync help file.

Multi-Threaded Synchronization Engine

The new multi-threaded synchronization engine introduced in SureSync 6 is extremely powerful and can push modern hardware much harder than previous versions. Understanding the difference in load placed on the machines involved in a synchronization job between SureSync 6.x and previous versions is important. The engine is optimized to spawn the same number of threads as CPUs or CPU cores present on the machine SureSync is installed on. For example, if you have a quad core processor in the SureSync machine each running Relation, Schedule or Real-Time Monitor will default to spawning 4 threads.

Consider an environment with 5 running Real-Time Monitors on a quad core machine. With previous versions of SureSync, the maximum number of file copies occurring at any one time would be 5. With SureSync 6, the maximum number of file copies occurring at any one time by default jumps to 20. If you're running a large number of Schedules and/or Real-Time Monitors, you could overwhelm slower machines or your network.

Each running Relation, Schedule or Real-Time Monitor launches a SyncFiles.exe process. In general, you should run as few SyncFile.exe processes as possible and let the multi-threaded synchronization engine do the work. Consider consolidation whenever possible. For example, if you have multiple Schedules each running a different Relation that run at the same time and have the same properties place the Relations under a single Schedule instead of multiple Schedules to minimize resource usage.

If you have a large quantity of jobs which run at the same time, you should consider setting the product to run single threaded for your initial deployment. This is controlled through the use of Priorities. For Schedules, the Priority used is defined on the Options tab. For a Real-Time

Monitor, the Priority options are defined on the Intervals tab. The configuration of Priorities is done by going to Tools | Options and selecting the Priorities tab. The option “Maximum number of worker threads” controls the number of threads a synchronization job will consume. Setting this option to 1 will make each running job operate single threaded like previous versions. You can then increase the threads and monitor the impact of the additional threads.

Information about SPIAgent Port Ranges

SureSync 6 uses the TCP port range of 9002-9033. This is the same range used in SureSync 5. SureSync 6 will not co-exist with previous SureSync versions. All previous versions of SureSync or the SPIAgent will be removed from your machines when upgrading to SureSync 6.

SureSync 4 used the TCP port range of 8002-8033. If you’re upgrading from SureSync 4, you need to ensure that the new port range is open in all the firewalls between machines being synchronized. You can also use the SPIAgent Configuration Utility on each SureSync/SPIAgent 6 machine and change the port range manually to the 8002-8033 range. This is not recommended because it requires a manual configuration change on each machine in your environment, running either SureSync or the SPIAgent. In most network environments there will be less firewall machines to configure than SPIAgent installations.

Upgrading from SureSync 5 to SureSync 6

Important: If you are upgrading from SureSync 5 to SureSync 6, you must obtain a new license number. Please call +1-650-372-0900 or send email to Sales@SoftwarePursuits.com to purchase an upgrade license. The upgrade is free to those with an Upgrade and Support Plan.

You must upgrade all machines in your environment to SureSync 6 at the same time, including the remote SPIAgent machines. SureSync 6 cannot communicate with SureSync 5.

Note: SureSync 6 requires the Microsoft .NET 3.5 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

If you are using SPIAgent File Locking in SureSync 5, you must remove the SPIAgent File Filter Driver from your machines before continuing with the installation of SureSync 6. This can be done from Add/Remove Programs and will require a reboot. The SureSync 6 setup will present an error and cancel until this component has been removed.

To upgrade from SureSync 5 to SureSync 6 please do the following:

1. Download the current version of SureSync 6 by clicking [here](#). Ensure that you have a valid SureSync 6 license file before proceeding with the upgrade. SureSync 6 uses a different license file than the SureSync 5 release and your old SureSync5.lic file will not be recognized by the program once you upgrade. A 30-day workstation trial license will be installed by default if you don’t have a valid SureSync 6 license file. Our sales department can be contacted at +1-650-372-0900 for more information about upgrading your licenses.

2. On the main SureSync machine(s) where the full application is installed stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab to prevent them from launching until the upgrade is complete.
3. If you're running an Access database, it is recommended that you run a compact database from **File | Database | Compact** before upgrading. If you're running a SQL database the compact operation is not available and you can skip this step.
4. Close SureSync.
5. Stop the SureSync Scheduler and SPIAgent 5 Service services.
6. Run the installer for the new version. The installer will detect the presence of an old version of SureSync and prompt you to allow the upgrade to continue. Click "Yes" to continue the upgrade. SureSync 5 will be removed and the installer for SureSync 6 will launch. Your database and settings will remain.
7. Follow the installer prompts. When you get to the panel titled 'Select an installation type' select the appropriate option. On the main SureSync machine, this should be "SureSync" unless you are also using file locking. If you're using file locking select "SureSync with SPIAgent File Locking". Continue through the installer until the program is installed.
10. If you're running the SPIAgent on remote machines, you must upgrade those installations as well. On any SPIAgent machines, run the installer and follow the prompts. The old SPIAgent will be removed and the new one installed.
8. On the main SureSync machine launch SureSync. You will be prompted to upgrade your database. Click "Yes". You will also be asked if you want to modify existing Rules to exclude files with the system attribute. Generally, these are files should not be copied. Click "Yes" to convert to the new standard of excluding these files by default. Click "No" to keep your Rules configured as is. If SureSync does not open your database automatically, go to **File | Database | Open Existing Database...** to open the database and have it upgraded.
9. Install your SureSync 6 license by going to **Help | Licenses** and click on the "Import License..." button. Select your license file and then click "Import License" to install the license.
10. Install the SureSync Scheduler service. This service is required for Schedules and Real-Time Monitors to run. To install the Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
11. Verify that the SureSync Scheduler and SPIAgent for SureSync services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 6!

Upgrading from SureSync 4 to SureSync 6

Important: If you are upgrading from SureSync 4 to SureSync 6, you must obtain a new license number. Please call +1-650-372-0900 or send email to Sales@SoftwarePursuits.com to purchase an upgrade license. The upgrade is free to those with a Support and Upgrade Plan.

You must upgrade all machines in your environment to SureSync 6 at the same time, including the remote SPIAgent machines. SureSync 6 cannot communicate with SureSync 4.

Note: SureSync 6 requires the Microsoft .NET 3.5 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

To upgrade from SureSync 4 to SureSync 6 please do the following:

1. Download the current version of SureSync 6 by clicking [here](#). Ensure that you have a valid SureSync 6 license file before proceeding with the upgrade. SureSync 6 uses a different license file than the SureSync 4 release and your old SureSync4.lic file will not be recognized by the program once you upgrade. A 30-day workstation trial license will be installed by default if you don't have a valid SureSync 6 license file. Our sales department can be contacted at +1-650-372-0900 for more information about upgrading your licenses.
2. On the main SureSync machine(s) where the full application is installed stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab to prevent them from launching until the upgrade is complete. It is recommended that you run a compact database from **File | Database | Compact** before upgrading. If you're running a SQL database the compact operation is not available and can be skipped.
3. Close SureSync.
4. Stop the SureSync Scheduler Start and SPIAgent services.
5. Run the installer for the new version. The installer will detect the presence of an old version of SureSync and prompt you to allow the upgrade to continue. Click "Yes" to continue the upgrade. SureSync 4 will be removed and the installer for SureSync 6 will launch. Your database and settings will remain.
6. Follow the installer prompts. When you get to the panel titled 'Select an installation type' select the appropriate option. On the main SureSync machine, this should be "SureSync" unless you are also using file locking. If you're using file locking select "SureSync with SPIAgent File Locking". Continue through the installer until the program is installed.
11. If you're running the SPIAgent on remote machines, you must upgrade those installations as well. On any SPIAgent machines, run the installer and follow the prompts. The old SPIAgent will be removed and the new one installed.
7. On the main SureSync machine launch SureSync. You will be prompted to upgrade your database. Click "Yes". You will also be asked if you want to modify existing Rules to exclude files with the system attribute. Generally, these are files should not be copied. Click "Yes" to convert to the new standard of excluding these files by default. Click "No" to keep your Rules configured as is. If SureSync does not open your database automatically, go to **File | Database | Open Existing Database...** to open the database and have it upgraded.
8. Install your SureSync 6 license by going to **Help | Licenses** and click on the "Import License..." button. Select your license file and then click "Import License" to install the license.
9. DCOM is no longer used in SureSync 6 to run the Scheduler service. Install the SureSync Scheduler service. This service is required for Schedules and Real-Time Monitors to run. To install the Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
10. Verify that the SureSync Scheduler and SPIAgent for SureSync services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 6!

Upgrading from ArchiveSync 4 to SureSync 6

ArchiveSync has been integrated into SureSync starting with SureSync 5. To upgrade to the current release of ArchiveSync you would migrate to SureSync 6.

Important: If you are upgrading from ArchiveSync 4 to SureSync 6, you must obtain a new license number. Please call +1-650-372-0900 or send email to Sales@SoftwarePursuits.com to

purchase an upgrade license. The upgrade is free to those with a Support and Upgrade Plan or rental agreements.

Note: *SureSync 6 requires the Microsoft .NET 3.5 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.*

To upgrade from ArchiveSync 4 to SureSync 6 please do the following:

1. Download the current version of SureSync 6 by clicking [here](#). Ensure that you have a valid SureSync 6 license file before proceeding with the upgrade. SureSync 6 uses a different license file than the ArchiveSync 4 release and your old SPILicense.lic file will not be recognized by the program once you upgrade. A 30-day workstation trial license will be installed by default if you don't have a valid SureSync 6 license file. Our sales department can be contacted at +1-650-372-0900 for more information about upgrading your licenses.
2. Launch ArchiveSync and place any Schedules and/or Real-Time Monitors on hold to prevent them from being launched during the upgrade process. It is also recommended that you compact your database by going to **File | Database | Compact**. If you're running a SQL database the compact operation is not available and can be skipped.
3. Close ArchiveSync.
4. Stop the ArchiveSync Scheduler Start and SPIAgent services.
5. Run the installer for the new version. The installer will detect the presence of an old version of ArchiveSync and prompt you to allow the upgrade to continue. Click "Yes" to continue the upgrade. ArchiveSync 4 will be removed and the installer for SureSync 6 will launch. Your database and settings will remain.
6. Follow the installer prompts. When you get to the panel titled "Select an installation type" select the appropriate option. On the main SureSync machine, this should be "SureSync" which includes the ArchiveSync components. Continue through the installer until the program is installed.
7. If you're running the SPIAgent on remote machines, you must upgrade those installations as well. On any SPIAgent machines, run the installer and follow the prompts. The old SPIAgent will be removed and the new one installed.
8. The default installation directory for ArchiveSync was C:\Program Files\Software Pursuits\ArchiveSync. The default ArchiveSync.mdb was created there. If this is the database you are using then you can either move the ArchiveSync.mdb to another folder on the system, rename it to SureSync.mdb (optional), then open it in SureSync to upgrade the database. You can also leave the database in the original directory and open it from there to upgrade. If you're using a SQL database or an Access database in a non-default location you will need to launch SureSync and then go to **File | Database | Open Existing Database...** to open the database and have it upgraded.
9. Install your SureSync 6 license by going to **Help | Licenses** and click on the "Import License..." button. Select your license file and then click "Import License" to install the license.
10. DCOM is no longer used in SureSync 6 to run the Scheduler service. Install the SureSync Scheduler service. This service is required for Schedules and Real-Time Monitors to run. To install the Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
11. Verify that the SureSync Scheduler and SPIAgent for SureSync services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 6!

Upgrading from SureSync 3 to SureSync 6

Important: If you are upgrading from SureSync 3 to SureSync 6, you must obtain a new license number. Please call +1-650-372-0900 or send email to Sales@SoftwarePursuits.com to purchase an upgrade license. The upgrade is free to those with an Upgrade and Support Plan.

Note: SureSync 6 requires the Microsoft .NET 3.5 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

To upgrade from SureSync 3 to SureSync 6 please do the following:

1. Download the current version of SureSync 6 by clicking [here](#). Ensure that you have a valid SureSync 6 license file before proceeding with the upgrade. SureSync 6 uses a different license file than the SureSync 4 release and your old SureSync4.lic file will not be recognized by the program once you upgrade. A 30-day workstation trial license will be installed by default if you don't have a valid SureSync 6 license file. Our sales department can be contacted at +1-650-372-0900 for more information about upgrading your licenses.
2. On the main SureSync machine(s) where the full application is installed stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab to prevent them from launching until the upgrade is complete. It is recommended that you run a compact database from **File | Database | Compact** before upgrading. If you're running a SQL database the compact operation is not available and can be skipped.
3. Close SureSync.
4. Stop the SureSync Scheduler Start service.
5. Download the latest release of SureSync 4 by [clicking here](#). To upgrade from SureSync 3 to SureSync 6 you must first upgrade to SureSync 4. Once that upgrade is complete you can then upgrade from SureSync 4 to SureSync 6. Launch the installer and follow the on screen directions to perform the upgrade. Launch SureSync 4 and your database will be upgraded to the SureSync 4 level. Close SureSync once the database has been upgraded.
6. Launch the SureSync 6 installer (SureSyncSetup.exe) and follow the on screen instructions to perform the upgrade. Once the installer has completed launch SureSync. If your database is in the default location of C:\Program Files\Software Pursuits\SureSync then it will automatically be upgraded. If you are using a SQL database or an Access database in a non-default location you must open it from **File | Database | Open Existing Database...** and then the database will be upgraded.
7. Install your SureSync 6 license by going to Help | Licenses and click on the "Import License..." button. Select your license file and then click "Import License" to install the license.
8. DCOM is no longer used in SureSync 6 to run the Scheduler service. You must install a new Scheduler to resume running Schedules and Real-Time Monitors. To install the new Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
9. If you were using the Real-Time Option please note that this is now part of the SPIAgent add-on. On the other machines involved in your Real-Time Monitors you will want to remove the SureSync 3.1 install. Once SureSync 3.1 has been removed, launch a copy of the SureSync 6 setup file (SureSyncSetup.exe). When you reach the "Installation Type" panel you should select "SPIAgent" for all machines other than the main SureSync machine. You will then need to configure the agents and modify your relations to

- reference the agents. Please consult our SureSync with SPIAgent Evaluator's Guide for more information about configuring Real-Time Monitors in SureSync 6.
10. Verify that the SureSync Scheduler and SPIAgent for SureSync services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 6!

Upgrading from a Release Older than SureSync 3

If you are running a release older than SureSync 3 and would like to upgrade to SureSync 6 please contact our technical support department by sending an e-mail message to Support@SoftwarePursuits.com or calling +1-650-372-0900 between 8:00AM and 5:00PM PST Monday through Friday for instructions.