

Endpoint Evaluator's Guide



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Table of Contents

Introduction	2
Contact Information	2
SureSync Endpoint Architecture	2
Our Scenario	3
Endpoint Licensing	4
Creating the Workstation Computers	4
Creating an Endpoint Group	7
Creating an Endpoint Job	9
Changing Endpoint Job Settings	10
Client Deployment via Manual Configuration	11
Step 1: Configure the First Endpoint Client	11
Step 2: Distribute Configuration File to other Endpoint Clients (optional)	14
Enable the Endpoint Job Group	15
Viewing Endpoint Status	15

Introduction

In the modern workplace, employees are becoming increasingly mobile. When an IT administrator needs to synchronize / replicate files with workstations and laptops, a great deal of flexibility is required.

SureSync Managed File Transfer (MFT) provides a comprehensive and flexible feature set that allows you to manage the flow of data to these types of machines. Workstations can be added as paths in standard MFT Jobs and controlled completely from the server.

When end users need more control of the Job, Endpoint can be deployed. Endpoint Jobs are designed for remote workers where the machines have dynamic IP addresses, are behind firewalls that you do not control or who need control to stop/start and review status.

This document assumes you have reviewed the main SureSync MFT Evaluator's Guide to complete initial setup. This guide will walk you through configuration of an Endpoint Job within SureSync MFT.

Contact Information

If you need further information about Endpoint or need clarification on anything within this guide, please contact our support group and they will be happy to assist you with your evaluation.

Software Pursuits, Inc. 140 Chestnut Ln San Mateo, CA 94403

Phone: +1-650-372-0900 Fax: +1-650-372-2912

Sales e-mail: <u>sales@softwarepursuits.com</u> Support e-mail: <u>support@softwarepursuits.com</u>

Technical support is available between 7:00AM and 4:00PM PST Monday through Friday.

SureSync Endpoint Architecture

SureSync MFT allows data to be processed in an extremely flexible manner. By default, the MFT Hub will attempt to make all necessary connections to remote Communications Agents. This works perfectly for machines within you own network where you have control of IP addresses, DNS names and firewalls.

MFT can be configured to instruct a remote Communications Agent to be responsible for establishing the connection back to the Hub. This allows remote computers with dynamic IP addresses or firewalls that cannot be changed to still connect to the MFT Hub to process necessary Jobs. Endpoint uses this type of connection.



User C on Business Trip

On the server side, a machine has SureSync MFT installed and is configured as a Hub. On this machine, you will use the SureSync MFT Desktop to configure the Endpoint Jobs.

On each remote machine, the Endpoint Client is installed. The client resides in the system tray of the computer and can be used to stop/start Jobs, view status and the log. These remote agents create the necessary connections to the Hub and the Hub processes the appropriate Job(s) assigned to the machine in question.

If the end users do not need access to status for the Jobs or the ability to enable/disable Jobs, a Communications Agent can be installed configured using the same type of connection to provide the same functionality minus the user interface for the client.

Since all connections to the MFT Hub are established from the client, there is no need for complex dynamic name resolution for the clients.

Our Scenario

This Evaluator's Guide will walk you through a sample configuration of SureSync MFT Endpoint. The scenario covered in this guide involves a Windows 2019 R2 server and two laptops running Windows 10. A diagram of the scenario is presented below.



In the example, the server side will be a destination and the laptops will be sending data to the server.

Endpoint Licensing

Endpoint functionality is included in the SureSync MFT workstation license.

Creating the Workstation Computers

The first step in configuring Endpoint is to add the relevant workstations into the MFT environment. To do so, click on the Computer button in the MFT Desktop ribbon bar.

Enter the workstation's NetBIOS computer name into the 'Computer Name' field.

When you a		an agent is an ays regarded on a min r nabi	
accessed us need to mo	dd a new ma ing its Comp dify your con	chine it will receive a default configuration that will listen on TCP port 7033 and will expect to b uter Name (NetBIOS name). If the computer must be accessed via a DNS name or IP Address yo nection definitions when the wizard completes.	oe ou will
You need to name witho	specify the (ut the name	Computer Name of your machine here, as configured on that machine. This must be the NetBIC qualified with the domain or workgroup name.	S
Duplicate Co	omputer Nar	nes are not supported.	
Comp	outer Name	spitest-win10	
Default Ac	cess Name	This is the default IP address, DNS Name, or NetBios name to be used to connect to this mach if explicit outbound connections are not defined by other agents for connecting to this mach IPv6 addresses must be enclosed in square brackets, like [::1]. This name is also used if the ag announces to other agents how they should connect to this machine. If omitted, the compute name is used.	hine ine. ent er
		IP address, DNS Name, or NetBios name	

Click 'Next' to continue.

tate	
Status: Machine is Disabled	
Enable all processing for t	his machine
Queue actions, but do not	execute actions. Allow scans.
 Disable all processing for 	this machine
ureSync MFT Agent	
Run a Communications Ag	gent on this machine
	Set Credentials for Accessing this Agent
Unly one machine can be con	figured as a Hub Service in a database. Stop existing Hubs before changing Hubs.
This machine runs as a Su	resync MET Hub Service
If the Hub Service should crea be configured to connect to t Hub can initiate connectio	te the connection to this machine, check the box below. If unchecked, the machine must he Hub Service using the local agent configuration on that machine. on
	Use this button to send a connection request to your Hub server to connect the Hub to
Test Connections to Agent	this machine using each of the defined connections.
	Using this test button will save your current configuration before attempting the test.

Click on the 'Set Credentials for Accessing this Agent' button.

Provide an administrator level local account on the workstation. This should be formatted .\username. This is the account that will be used for file access on the workstation. It is recommended to use a custom administrator account with a strong password.

Set Credentials	_		×
Specify the user name and password needed to access	files on this ma	chine.	
Account Name:			
.\username			
Specify an administrator account that will perform I/O User Name must be in "domain\username" or "comput use a period for a computer name. For example ".\Adm	operations usin :er\username" f iin".	g this agen ormat. You	t. may
Password:			
•••••			
Repeat Password:			
•••••			
the message with the public certificate listed here.) be decrypted by this machine. The private key is sto certificate store and known only on this machine. By default, a self-signed certificate is generated by configuring here to handle this encryption task. You use of your own certificate if you installed it in the store. If you specify your own certificate it will be ve- stated to be the public of the new them center the term of the term of the public of the new them center the term of the term.	'hat message ca red in the 'loca the machine you i may, however, local machine' o rified to ensure	an then onl I machine' u are specify the certificate that the	<u>р</u>
certificate is valid and has not been revoked.			
Certificate search type:			
Use a self-signed certificate A self-signed certificate will be created as needer not be validated to ensure it has not been revoke generated periodically.	l. This certificat d. A new certif	te will 🖕	
Cancel Save			

Click the 'Save' button to save the credentials.

If you want the workstation to create the connection back to the MFT Hub, uncheck the "Hub can initiation connection' option. Otherwise, the MFT Hub will attempt to establish connections.

itate									
Status: Machine is Disabled									
 Enable all processing for 	this machi	ne							
 Queue actions, but do n 	ot execute a	actions. All	low scans.						
 Disable all processing for 	r this mach	ine							
sureSync MFT Agent									
Run a Communications	Agent on th	his machine	e						
		Set Crede	entials for A	ccessing this	Agent				
Only one machine can be co	onfigured as	s a Hub Se	rvice in a d	atabase. Stop	existing Hu	bs before o	hanging	Hubs.	
This machine runs as a S	GureSync Mi	FT Hub Ser	vice						
If the Hub Service should cr	eate the co	nnection to	o this mach	ine. check th	e box below	If uncheck	ed. the m	nachine	must
be configured to connect to	the Hub Se	ervice usin	g the local	agent config	uration on th	nat machine	e.		
Hub can initiate connect	tion								
~									

Click 'Next' to continue.



Click the 'Finish Server' button to finish adding the machine.

Creating an Endpoint Group

Y

The next step is to create an Endpoint Group. To create an Endpoint Group, click on the Endpoint



Provide a name for your Endpoint Group in the first panel of the wizard and click 'Next' to continue.

7 Software Pursuits, Inc. www.SoftwarePursuits.com On the next panel, you define the server path for the Jobs that will be created under this group. The server path can be the MFT Hub or any other Communications Agent defined in your MFT database. The server path can be a source, a destination, or both (multi-directional synchronization).

In this example, the server will be the destination. We also want to store the data from each incoming machine into its own folder. We will use the %ClientComputer% variable. This will create a subfolder in the root path with the name of the client computer sending the files for each computer that connects.

For our example, the server path will be a destination is D:\MFT Test Folders\Endpoint Destination\%ClientComputer%.

the root path for each job ge	nerated.
Changes you make on this pa with the same purpose.	nel will not alter existing jobs in this Endpoint Group. Keep the jobs in a logical grouping, each
Server Root Path Usage	 Source Destination Archive Destination Multi-way rules apply if both Source and Destination are checked, otherwise one-way rules apply.
Server Agent	Hubs\dev40 • Select the Agent to be used to access the server's Root Path.
Server Root Path	D:\MFT Test Folders\Endpoint Destination\%ClientComputer% Browse You can use the variable "%ClientComputer%" in your root path to represent the computer name of each client computer.
After your Endpoint Grou	up is saved, you can use a button on the property sheet to generate jobs into the group and configured

Click "Next" to continue.

The final panel defines the scheduling to be used for the Jobs added to this Endpoint Group. By default "Always On" is selected which processes data in real-time as changes occur. For this example, we will use the default.



Click "Finish Endpoint Group" to create the group.

Creating an Endpoint Job

The next step in configuring SureSync MFT Endpoint is to create an Endpoint Job. The Job will define the computers involved in the synchronization process.

To create the Job, click on the Example Endpoint group created in the previous step. Click on the 'Create Endpoint Job' tab.

Endpoint Group Ex	ample Endpoint Group
General Create Endpoint Job	s Scheduling Security
On this panel you need to spe "%ClientComputer%" in your inserted into the root path for	cify the server Root Path that will be used in each new job you create. Use the variable server root path to represent the computer name of each client computer so it can be r each job generated.
Changes you make on this pa grouping, each with the same	nel will not alter existing jobs in this Endpoint Group. Keep the jobs in a logical purpose.
Server Root Dath Usane	□ Source ☑ Destination
Server noor Patrosage	Archive Destination Multi-way rules apply if both Source and Destination are checked, otherwise one- way rules apply.
Server Agent	Hubs\dev40 Select the Agent to be used to access the server's Root Path.
	D:\MFT Test Folders\Endpoint Destination\%ClientComputer% Browse
Server Root Path	You can use the variable "%ClientComputer%" in your root path to represent the computer name of each client computer.
	Add Endpoint Jobs
Use this button to create like any other job. Alterin	new jobs for client machines to this group. Once created, the jobs can be modified g values on this group panel will not alter existing jobs.
	View Errors Cancel Apply

Click on the 'Add Endpoint Jobs' button.

9 Software Pursuits, Inc. www.SoftwarePursuits.com

🚺 Create Endpoint Jobs					-		×
This form is used to create on another computer.	e or more jobs to synchroni	ze between the server	path spe	ecified on your Endpoint Gro	up and a loca	I path on	
The client computer must insi controlled by the MFT Hub se	all the SureSync MFT Endpo rvice. It also provides a user	int client. That compo interface for the end	onent pro user to n	ovides an agent that will hand nonitor activity.	dle the replica	ition tasks	1
Jobs and computer reference selected the job and selecting	s created by this form may b the Delete action.	e altered individually	after the	jobs have been created. Dele	ete unwanted	l job by	
	✓ Source						
Client Post Dath Hanna	Destination						
Client Root Path Usage	These options are determi Source and Destination are	ned by the settings sp e checked, otherwise o	ecified fo	or the server Root Path. Multi rules apply.	i-way rules ap	oply if bot	h a
Client Machine	Servers\spitest-win10 Select or enter the name o will be created with the clii modified after the job is cr	 a machine to be use ent creating the conne reated. 	d as a cli ection to	ient. If a new machine, a defa the Hub service. The comput	ult agent con ter configurat	figuratior tion may t	1 De
	C:\EndpointSource						
Client Root Path	Specify the Root Path, as vi the connection to the client	ewed by the client ma t machine.	ichine. Br	rowsing is not possible becau	ise the Hub ci	annot crea	ate
This form will remain open a	fter you add a new job, allov	ving you to specify a r	new com	puter and create another job			
		Add Endpoint Job	Close				

On the panel that loads, select the workstation from the Client Machine drop-down.

In the 'Client Root Path' key in the path on the workstation. For this example, we are using C:\EndpointSource.

Click the 'Add Endpoint Job' button to create the Endpoint Job.

Changing Endpoint Job Settings

The Endpoint Job is configured with a basic set of default settings. The one-way Rule used is a Mirror and the multi-way Rule used is a Multi-Mirror.

You may want to make additional changes to the configuration of your Job. For example:

- Include or exclude specific folders, files, or file extensions.
- Enable Advanced Open File Support
- Change the Rule Types used

All of this is done in the property sheets for the Endpoint Job.



Pressing the F1 key on each of the tabs will launch context sensitive help explaining the options that are available to you.

Client Deployment via Manual Configuration

The installer for the SureSync MFT Endpoint Client can be downloaded here.

On each client, execute ssmftendpoint.exe and follow the on-screen prompts. The installer is a standard Windows installer. You can distribute the setup using any existing deployment solution available on your network. A silent command line installation is available using the /s switch.

Each Endpoint Client must be configured with the connection details necessary to reach the MFT Hub. When the client software is launched, it will connect to the server and start processing data.

Step 1: Configure the First Endpoint Client

The configuration information defined on one Endpoint Client machine can be easily distributed to other clients. The first step is to install the Endpoint Client on a machine and complete the configuration.

When the Endpoint Client is launched the first time without a configuration you will receive the following message:



Clicking "OK" will launch the Client Connections panel used to define the connection used by the Endpoint Client to reach the server for Job configuration retrieval.

Client Connections			-	- [ı ×
This panel is used to identify the computers that must be running a MFT Hub service.	t will provide fil	e synchronization s	service	s. These	machines
Select a computer from the list to edit its setting	IS.				
[Please select a machine from the list]	•	Add New Mach	ine	Delete	Machine
Please define the connection to use to connect t	to the Software	Pursuits Commun	ication	s Agent	running or
Please define the connection to use to connect to the target machine. If multiple connections are o connection fails.	to the Software defined, the alt	Pursuits Commun ernates will be used	ication I if the	s Agent i primary	running o
Please define the connection to use to connect i the target machine. If multiple connections are o connection fails. Select the connection to configure or use the 'A	to the Software defined, the alt dd' or 'Remove	Pursuits Commun ernates will be used ' buttons below.	ication d if the	s Agent i primary	running o
Please define the connection to use to connect to the target machine. If multiple connections are of connection fails. Select the connection to configure or use the 'A [Please select a connection]	to the Software defined, the alt dd' or 'Remove	Pursuits Communi ernates will be used ' buttons below. Add Connection	ication d if the Rem	s Agent i primary	running of
Please define the connection to use to connect the target machine. If multiple connections are of connection fails. Select the connection to configure or use the 'A [Please select a connection]	to the Software defined, the alt dd' or 'Remove	Pursuits Commun ernates will be used ' buttons below. Add Connection	ication d if the Rem	s Agent i primary	running or

Click the "Add New Machine" button.

🔼 Add Communica	ations Agent		_		\times
You should only add are the machines tha	machines that wi at are running you	ill be running a SureSync ir jobs and, hence, have j	MFT Hub s ob status a	ervice. Ti vailable.	hese
When you add a new being accessed using name or IP Address configuration panel.	v machine, it will r g it's Computer N you will need to a	receive a default configur ame. If your computer m Iso specify that value her	ation. It wil ust be acce e or on the	l default ssed via connect	to a DNS tion
The computer name such as the NetBios	specified here mu name. Duplicate c	ust be the simple, unqual computer names are not :	ified compo supported.	uter nam	ie,
Computer Name	Enter the DNS	Name, IP Address, or Con	nputer Nam	ie.	
Access Name	DNS name, IPv4 machine.	or IPvб address, or NetB	iOS name c	of this	
	Cancel	Save New Computer			

In the 'Add Communications Agent' dialog box, enter the NetBIOS computer name of the MFT Hub in the 'Computer Name' field.

Enter a public IP address or DNS name that the workstation can reach the MFT Hub via in the 'Access Name' field.

🔼 Add Communica	tions Agent	-		×
You should only add are the machines that	machines that will be running a SureSyn t are running your jobs and, hence, have	c MFT Hub se job status av	ervice. Th ailable.	nese
When you add a new being accessed using name or IP Address y configuration panel.	machine, it will receive a default config it's Computer Name. If your computer i ou will need to also specify that value h	uration. It will must be acces ere or on the	default sed via connect	to a DNS iion
The computer name s such as the NetBios n	pecified here must be the simple, unqu ame. Duplicate computer names are no	alified compu t supported.	iter nam	e,
Computer Name	dev40			
Access Name	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	BIOS name o	f this	
	Cancel Save New Computer			

If the Endpoint machines in your environment will be roaming from network to network, you must use either a public IP address or a publicly resolvable DNS name to configure the Endpoint Client to use to reach the Hub server. If there is a firewall, you must configure port forwarding to send the TCP 7033 port traffic arriving at that IP/DNS name to the correct server in your internal network.

Click the "Save New Computer" button.

elect a computer	r from the list to ea	dit its settings.				
dev40 (from Lo	cal Definitions)		•	Add New Mach	nine	Delete Machine
Please define the he target machin onnection fails.	connection to use e. If multiple conn	to connect to the Softw ections are defined, the	vare l alter	Pursuits Commun mates will be used	ication d if the	s Agent running o primary
dev40, TCP Port	=7033 TLS with C	ertificate	A	dd Connection	Rem	ove Connection
Connection Beir	ng Configured —					
	dev40					
Access Name	DNS name, IPv4	or IPv6 address, or Net	BIOS	name of this mad	hine.	
Port	0 \$	Specify the listening match the port specif this service. Zero will	port t ied b use t	o use for this con y any program th he default TCP po	nection at need rt of 7	n. This must ds to connect to 033.
Timeout	0 \$	Number of seconds b transmission. Value sl of 90.	efore hould	e a Timeout Excep be 15 to 300. Zer	tion or ro requ	n a message lests the default
Encryption	The Communica algorithms are U for the FIPS 140- All connections I	tions Service always en Inited States Federal Inf 2 standard. petween machines mus	crypt: forma	s messages and fi tion Processing S configured to use	les trar tandar an ide	nsferred. All d (FIPS) certified ntical algorithm.
Lineyption	(Default) Trans Certificate TLS encryption certificate.	port Layer Security (TL is used with a self-sign	S) wit	th erver		

The resulting configuration generated after clicking the 'Save New Computer' button is fully functional with the default settings.

This default configuration has two connections. The first connection is on TCP 7033 and is encrypted with TLS with Certificate. This connection is used for data transfer. The second connection is TCP 7033 and is encrypted with Basic256. This connection is used for status and configuration transfer.

You can use the "Test This Connection" button to ensure that Endpoint Client is able to reach the server. Both connections must test successfully for Endpoint to function correctly.

If the Access Name you provided does not work, you can change it in the "Access Name" field here. Both connections must use the same Access Name.

Step 2: Distribute Configuration File to other Endpoint Clients (optional)

Once you have configured an Endpoint Client, you can distribute the same configuration to other machines easily. In C:\Users\Public\Software Pursuits\SureSync MFT1 you will find a file named MFTEndpoint.xml. This file contains all the server configuration information.

To configure a second machine to use the same server connection, simply install the SureSync MFT Endpoint Client and copy the MFTEndpoint.xml file into C:\Users\Public\Software Pursuits\SureSync MFT1 before launching the application. If the application is already open, close it before copying the xml file into the directory and launch it again.

Enable the Endpoint Job Group

Once you're ready to begin processing, you must enable the Endpoint Job Group. This is done in the SureSync MFT Desktop by clicking on the Job Group, unchecking 'Disable all processing for this Group' and clicking apply.



Once the Endpoint Group is enabled, processing will begin.

Viewing Endpoint Status

Status of the Endpoint Jobs can be viewed both on the server-side and the client-side.

To view Status of a specific Job in the SureSync MFT Desktop, click on the Job and then click on the Detail Status button in the ribbon bar.

Su Home Managed File Transfer	ureSync MFT Desktop - Software Pursuits	×
Detail Status Status	ter Disable/Stop Options Licenses Videos	
 Computers and Storage Job Groups (Default Group) 	Job Example Endpoint Group\spitest-win10 General Scheduling Logging Options Define Alert Filters Rules Security	
 Example Endpoint Group Example Endpoint Group\spitest-win10 Root Paths Rules Rule #1, Copy Files, \ *.* Alert Filters Schedule Group Schedule Definitions 	Description	
 Interval Sets Restores for Hub dev40 	Last Enabled: Thursday, July 28, 2022 11:06 AM State State State Use File Locking Check if file locking is to be used for this job	
		View Errors Cancel Apply

On the client-side, if you launch the Endpoint tray application there will be a 'Display Status' button. The end user can also disable/enable Jobs assiged to their computer from here.

🔀 SureSync MFT Endpoir	nt		-		×
Jobs Communications C	Options				
Jobs are defined and contr be listed.	rolled by the	e SureSync MFT Hub ı	machine. Only jobs configured to access	this machine (will
Job	Status	Detailed Status	Alerts and Logs	Action	