

Evaluator's Guide



Table of Contents

| Introduction | .2 |
|---|----|
| System Requirements | .2 |
| Contact Information | .2 |
| Our Scenario | .3 |
| Understanding SureSvnc MFT Terminology | .3 |
| Hub | .3 |
| SureSync MFT Database | .4 |
| Communications Agent | .4 |
| Job | .4 |
| Interval Set | .4 |
| Schedules | .4 |
| What is File Locking? | .4 |
| Supported Applications for File Locking | .5 |
| Expected Application Behavior when Encountering Locks | .6 |
| Installation | .7 |
| Launch SureSync MFT for the First Time | .8 |
| Creating a SureSync MFT Database | .8 |
| Configuring the Hub Communications Agent Credential1 | 10 |
| Importing a License1 | 11 |
| Configure the Additional Communications Agents1 | 11 |
| Define the Computer Name1 | 11 |
| Define User Account and Other Details1 | 12 |
| Creating the Jobs1 | 14 |
| Name Your Job1 | 15 |
| Set Job Properties1 | 15 |
| Add Your Root Paths1 | 16 |
| Configuring E-mail Alerts2 | 20 |
| Configuring a SMTP Profile | 20 |
| Configuring an Alert Profile | 21 |
| Configuring Alert Filters on the Job | 22 |
| Monitoring the Environment | 25 |
| Detailed Status | 25 |
| Enterprise Status | 25 |
| File Status | 26 |

Introduction

SureSync Managed File Transfer (MFT) is a next generation enterprise grade managed file transfer application. Data is the lifeblood of modern business. Files must be readily available and accessible from wherever an employee needs access. Companies need a detailed audit trail and powerful reporting capabilities to know what data processing has been completed and what remains to be done. SureSync MFT provides a flexible, efficient, and intuitive solution to these data management challenges.

This Evaluator's Guide is designed to walk you through the initial setup of SureSync MFT using a common example. This guide will configure a multi-directional synchronization with file locking. This is only one scenario SureSync MFT can handle. Other examples include:

- One-way distribution of files to remote offices. For example, publishing new sales collateral to remote sales offices
- · Archiving commonly used files into the cloud for disaster recovery purposes
- Backing up data from remote / mobile desktop and laptop computers

By working through this guide, you will develop a deeper understanding of how to configure SureSync MFT. A single document cannot describe all the powerful functionality available to you. Our support team is always available to provide additional guidance. We recommend scheduling an initial conversation with the team when planning your trial.

System Requirements

SureSync MFT's System Requirements can be reviewed at https://support.softwarepursuits.com/suresync-mft-system-requirements.

Contact Information

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

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Our Scenario

This guide will walk you through the configuration of SureSync MFT to accomplish a multi-way synchronization of files between *DEV20*, *SPITEST-WIN2K8* and *SPITEST-WIN2K12* with file locking.

SureSync MFT is capable of one-way and multi-way file processing. It can process files in real-time or on a scheduled (clock) basis. The intent of this guide is to show you the basics of configuring SureSync MFT. Please consult the help file, Ed Center training videos and contact our support team if you require additional guidance specific to your environment.



SPITest-Win2K8

SPITest-Win2K12

In this example, the contents of a folder C:\Documents will be processed with a multi-directional Rule with file locking. This is a common scenario for enabling collaborative file shares.

Understanding SureSync MFT Terminology

Understanding the building blocks of the SureSync MFT architecture will make it easier to deploy the solution.

<u>Hub</u>

The Hub is the brain of SureSync MFT. This machine has access to the MFT database and coordinates the actions of the other machines in the environment to achieve the required data movement.

SureSync MFT Database

MFT requires a Microsoft SQL database. This database is accessed by the Hub and is used for storing file state, configuration, and reporting information. This database can exist on the same machine as the Hub service or on a remote machine accessible from the Hub machine.

Communications Agent

The Communications Agent should be installed on all Windows machines that house data being processed by SureSync MFT. This service enables much of the advanced performance enhancing functionality in SureSync MFT. Non-Windows machines must be accessed via UNC path and processed with Schedules.

<u>Job</u>

A Job identifies the directory structure that should be processed, and the machines involved. The Job includes settings such as file masks, how to handle security copying and much more. Jobs are automated via a Schedule or an Interval Set.

Interval Set

An Interval Set will process file changes as they occur (real-time processing). The Interval Set can contain multiple Intervals that cover different spans of time with different options. An Interval Set is applied to a Group, a Job or a Root Path.

Schedules

A Schedule is used to process changes on a clock basis, such as once an hour. A Schedule is applied to a Group, a Job or a Root Path.

What is File Locking?

File Locking makes it simple to collaboratively share files between multiple offices while ensuring that users cannot make changes to the same file at the same time.



File Locking will lock a file on all paths when a user opens the file on one machine. In this example, we have three servers named "ServerA," "ServerB," and "ServerC." These machines all contain a copy of a folder being processed by a SureSync MFT Job. Assume that UserA on ServerA has opened Document1.doc that results in a lock being established.

File Locking does not block users on the server where the initial open happens. For example, if a user opens the file on Server A, SureSync MFT's locks occur only on ServerB and ServerC. The behavior a user encounters opening the same file on ServerA depends on the application. This allows multi-user programs such as Microsoft Access to work properly on the one machine while blocking access from the others.

While the file is locked, no other user can access a write-enabled copy of the file. If a user attempted to open the "Document1.doc" file on "ServerB," they would receive a read-only copy. If LockStatus is installed on the client, a tray notification would be provided to the user encountering the lock.

Once UserA saves the change and closes the file, SureSync MFT will replicate the changed version of the file to "ServerB" and "ServerC."



Once the file has been synchronized to the other machines, the lock will be released by SureSync MFT. At that time, other users can access the updated file with write access.



Supported Applications for File Locking

Please visit <u>https://support.softwarepursuits.com/which-applications-are-supported-by-file-locking</u> for a list of applications supported by File Locking.

Expected Application Behavior when Encountering Locks

The behavior an end user will encounter when opening a locked file depends on the application. When deploying File Locking, it is strongly recommended that you inform end users in advance about what they can expect to experience when encountering locks.

The LockStatus application can be used to provide pop-up notification from the system tray on an end user's computer when they attempt to open a locked file.

This section highlights the behavior of a couple of common applications used with File Locking.

Microsoft Office

In the Microsoft Office applications, the file will open with [Read-Only] in the title bar.

| File | Tools | View | Test03Model.docx [Read-Only] [Compatibility Mode] - Word | þ | - | | × |
|---------|--------|--------------|--|-----------|---------|---------|------|
| | | | 4 | | | | |
| | | | | | | | |
| | Thi | s is a te | est Word document in .DOCX forma | t. | | | |
| | Chan | ge 001 | | | | | |
| | | | | End of do | ocument | | |
| AutoC/ | AD | | | | | | |
| In Auto | CAD, a | n alert like | e the one below is presented allowing the user to o | pen a i | read-o | only co | ору. |



Installation

To get started with your SureSync MFT trial, you must install the correct components on each machine involved.

For the scenario covered in this guide, the Hub components will be installed on one machine (*DEV20*) and the Communications Agent will be installed on two machines (*SPITEST-WIN2K8* and *SPITEST-WIN2K12*).



On the *DEV20* machine, we will run SureSyncMFTSetup.exe and select "Full / MFT Hub" as the installation type. This will install the complete SureSync MFT application (user interface and a Communications Agent) and designate *DEV20* as the machine where we configure and run Jobs.

| | | — | | × | |
|---|--|--------------|------|-----|--|
| ← | 🝼 SureSync MFT Setup - InstallAware Wizard | | | | |
| | | | | | |
| | Which features of SureSync MFT do you want to install? | | | | |
| | <u>Full</u> / MFT Hub | | | | |
| | Performs a full installation of the MFT Hub, Communications Agent and user interface components. | | | | |
| | MFT Communications Agent | | | | |
| | Installs the MFT Communications Agent only. Installed on each machine sending or receiving files that does not have a full installation. | | | | |
| | ○ <u>U</u> ser Interface | | | | |
| | Installs the user interface components only. Useful for monitoring MFT from a workstation. | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | <u>N</u> ext | Cano | :el | |
| | | | | | |

On *SPITest-Win2K8* and *SPITest-Win2K12*, the "MFT Communications Agent" setup type should be used.

Launch SureSync MFT for the First Time

To launch SureSync MFT for the first time, go to the Start menu, select the SureSync MFT folder and click on the SureSync MFT Desktop icon. This will launch the SureSync MFT Desktop where you will complete the configuration of your environment.

In this example, we will create the database using the wizard. The SQL account used must be a sysadmin in SQL. If you decide to create a blank database in SQL Management Studio first, you would use the 'Open an unlisted database' option instead.

Creating a SureSync MFT Database

On first launch of the SureSync MFT Desktop, you will be presented with the following prompt:

| 🜃 Open or Create Database | — | | × |
|---|----------|------------|----|
| This form is used to open or create a database. Select an existing SureSync MFT obstructions for other actions. MFT Hub Services are defined within the database. | latabase | e or use t | he |
| Select an existing SureSync MFT database: [Select a Database] • | | | |
| Create a new database Use an empty database | | | |
| Open an unlisted database Cancel | | | |

This panel is used to create the Hub database. To start the process, click the 'Create a new database' button.



Enter the following information to create the SureSync MFT database:

- Name of the SQL Server and any Instance Name: Enter the name of the SQL server and an instance name if used. For example, dev20\sqlexpress.
- Name of any Failover Partner (mirrored) SQL Server: This is an optional field that allows you to use a SQL Failover Partner. This functionality has been depricated from SQL but is currently still available. Should be defined as machinename\instancename.
- Name of SQL Database: Enter the name of the SQL database that should be created.
- Full path and file name of the new SQL database: Enter the path on the SQL server where the database files should be created. This folder must already exist. For example, G:\Databases\SureSyncMFT.mdf.

Once the form is filled in, click on the 'Set SQL Database Credentials' button to provide the SQL user account to be used to create and access the database.

| 🚺 Open Database | | - 🗆 X |
|---|---|--|
| Windows authentication is normall service accesses the database with Please specify the SQL Server acco | y used for accessing your database except for access by the SureS a system account and must use a SQL Server account for databas int name and password to be used by the Hub service. | iync Hub Service. The Hub e access. |
| Your database server must be con configured as a database owner, saved. | nfigured to use both Windows and SQL authentication. Your SQL a The MFT Desktop user must also be a database owner so that con | account below must be nfiguration values can be |
| SQL Server account name: SureSyncMFT | ✓ Use the SQL Server account only for the Hub Service. If unchecked, all database accesses will use the SQL acco entered by each machine using the MFT Desktop. | ount and credentials must be |
| Password: •••••• Repeat Password: | | |
| | Cancel Save | |

The fields that need to be filled out are:

- SQL Server account name: Enter the account name such as SQLAdmin.
- **Password/Repeat Password**: Enter the password for the account twice.

By default the "Use the SQL Server account only for the Hub Service" option is checked. When in this mode, any Windows user accounts that will be accessing the MFT Desktop to make configuration changes must also have db_owner permissions granted so any configuration values defined can be saved to the database.

If you uncheck that option, the SQL credential will be used for the MFT Desktop as well. This means if you are using the MFT Desktop from multiple machines to access the Hub database, you will need to provide that credential on the open database dialog and uncheck the "Use the SQL Server account only for the Hub service" option.

Click the 'Save' button to save the credential.

You will be returned to the main panel. Click the 'Continue' button to create the SureSync MFT database.

Configuring the Hub Communications Agent Credential

Once the database has been created, you will be prompted to provide a Windows credential for the Communications Agent on the Hub to use for accessing files. The following panel will be displayed:

| 🧾 Set Hub Agent Credentials | - | | × |
|---|--|--|-----|
| Specify the user name and password needed to access files on | this machi | ne. | |
| As a security measure, any existing credentials are not displaye values if you want to save the contents of the dialog. | d. You mus | st enter n | iew |
| User Name: | | | |
| domain\user | | | |
| User Name must be in domain\username or computer\username | ne format. | | |
| Password: | | | |
| ••••• | | | |
| Repeat Password: | | | |
| ••••• | | | |
| Server Certificate | | | |
| When secure message must be sent to this agent, a remote the message with the public certificate listed here. That me be decrypted by this machine. The private key is stored in t certificate store as a personal certificate and known only or By default, a self-signed certificate is generated by the mac configuring here to handle this encryption task. You may, h use of your own certificate. If you specify your own certificat to ensure that the certificate is valid and has not been revo | machine e ssage can t he local co i this mach hine you a owever, sp ite it will be ked. | encrypts then only mputer ine. re ecify the e verified | r |
| Certificate search type: | | | |
| Find by Thumbprint Match Value must be a string representing the thumbpri certificate. | nt of the | • | |
| Certificate Match Value: | | | |
| Cancel Save | | | |

Enter the following information:

- **User Name**: Enter a valid Windows account in domain\user or machine\user format. This account will be used to access files that need to be processed by SureSync MFT if a root path exists on the Hub server.
- **Password/Repeat Password**: Enter the password for the account twice.

Optionally, you have some encryption options for the credentials. By default, a new self-signed certificate will be generated. You can also use your own certificate to encrypt the credential as long as that certificate is in the local certificate store.

Click the 'Save' button to save the credential.

The following dialog will be displayed:



To complete the SureSync MFT Hub configuration, launch the Windows Services MMC and start the Software Pursuits SureSync MFT Communications Agent service.

Importing a License

The installer includes a trial license. The included trial allows for 1 Hub, 5 Servers and 5 workstations. Larger trials can be arranged by calling our sales team at 1-800-367-4823.

If you have already purchased SureSync MFT licensing, the license should be imported into SureSync MFT Desktop.

To import a license, click the "Licenses" button (^{Licenses}) in the ribbon bar of the SureSync MFT Desktop and click the "Import License…" button.

Configure the Additional Communications Agents

Before defining the data that should be processed by SureSync MFT, you want to add the computers that will be involved. To add a machine, expand the 'Computers and Volumes' section of the left-hand tree view in the SureSync MFT Desktop. Click on 'Servers' and then click the 'Computer' button in the ribbon bar.

| | | SureSync MFT Desktop - S | Software Pursuits - | × |
|-------------------------------|--------------------------|--------------------------|-------------------------|-----|
| Home Managed File | Transfer | | | (?) |
| Enterprise Status and Logs | Computer Folder Computer | Options Licenses Videos | | |
| Status | Create | Actions | - | |
| 🖌 🗮 Computers ar | nd Volumes | | | |
| = compaters an | | | Computer Folder Servers | |
| Hubs | | | | |
| 🕨 📰 Servers | | | General | |
| - Workstati | ons | | | |
| 🕨 📗 Storage A | ccounts | | | |

The 'Create Computer' wizard will be launched.

Define the Computer Name

The first panel is where you provide details about the name of the computer and the address needed to reach the computer. The following panel is displayed:

| You only need to add ma by SureSync MFT. Machir need to be added here. 4 | chines that will be running a Software Pursuits Communications Agent Service the res accessed via UNC paths do not need to be added. SureSync MFT Endpoint cl An agent is always required on a MFT Hub. | hat will be ient mach | accessed ines do n |
|--|---|--|---------------------------------|
| When you add a new ma accessed using it's Comp need to modify your con | chine it will receive a default configuration that will listen on TCP port 7033 and uter Name (NetBIOS name). If the computer must be accessed via a DNS name on nection definitions when the wizard completes. | will expect or IP Addr | t to be ess you w |
| You need to specify the C name without the name | Computer Name of your machine here, as configured on that machine. This must qualified with the domain or workgroup name. | t be the Ne | etBIOS |
| Duplicate Computer Nam | nes are not supported. | | |
| Computer Name | spitest-win2k8 | | |
| | This is the default IP address, DNS Name, or NetBios name to be used to connu- if explicit outbound connections are not defined by other agents for connectin | ect to this g to this n used if th | machine nachine. le agent |
| Default Access Name | IPVo addresses must be enclosed in square brackets, like [::1]. This name is also announces to other agents how they should connect to this machine. If omittee name is used. | d, the com | nputer |
| Default Access Name | IPVo addresses must be enclosed in square brackets, like [:: 1]. This name is also announces to other agents how they should connect to this machine. If omittee name is used. IP address, DNS Name, or NetBios name | d, the com | nputer |

Please provide the following details:

- **Computer Name**: This field must contain the NetBIOS computer name of the computer you are adding. Duplicate computer names are not allowed in the same SureSync MFT environment. In the example above, we are adding the *SPITest-Win2K8* machine.
- **Default Access Name**: The Default Access Name is the DNS name or IP address that SureSync MFT will use to access this computer. If this field is left blank, the NetBIOS computer name will be used. If this does not resolve, you will want to enter a different IP address or DNS name here.

Click 'Next' to continue.

Define User Account and Other Details

The next panel allows you to enable actions to the Communications Agent, provide a credential and more.

| - | |
|--|--|
| Enable all actions | |
| O Queue actions, but do r | ot execute actions. Allow scans. |
| Disable all actions | |
| | |
| ureSync MFT Agent | |
| Run a Communications | Agent on this machine |
| | Set Credentials for Accessing this Agent |
| Only one machine can be c | onfigured as a Hub Service in a database. Stop existing Hubs before changing Hubs. |
| This machine runs as a | SureSync MFT Hub Service |
| If the Hub Service should cr be configured to connect to I hub can initiate connec | eate the connection to this machine, check the box below. If unchecked, the machine must the Hub Service using the local agent configuration on that machine. tion |
| | |
| | Use this button to send a connection request to your Hub server to connect the Hub to |
| Test Connections to Agen | Use this button to send a connection request to your Hub server to connect the Hub to this machine using each of the defined connections. |

Each computer defined in SureSync MFT has a 'State' setting. This setting defines what type of processing should be performed on a computer wide basis. Similar settings are available for individual root paths.

The following options are available:

- **Enable all actions**: All actions on all root paths defined on this machine will be processed. This is the recommended setting.
- Queue actions, but do not execute actions. Allow scans.: Actions on all root paths defined in Jobs are queued to be processed. The actions will not be performed until the Status is changed to "enable all actions." This is useful when you want to build a backlog of actions to be performed later.
- **Disable all actions**: With this option enabled, no files will be processed on paths on this machine. This is true even in instances when a Job that includes a path on this machine is enabled.

For our example scenario, we accept the default 'Enable all actions' radio button.

The 'Run a Communications Agent on this machine' option is checked by default.

Click on the 'Set Credentials for Accessing this Machine' button. The following panel will launch:

| 🧾 Set Credentials | - | | Х |
|--|--|---|---|
| Specify the user name and password needed to access fi | les on this machir | ne. | |
| As a security measure, any existing credentials are not di values if you want to save the contents of the dialog. | splayed. You mus | t enter ne | w |
| User Name: | | | |
| domain\user | | | |
| User Name must be in domain\username or computer\u | sername format. | | |
| Password: | | | |
| ••••• | | | |
| Repeat Password: | | | |
| ••••• | | | |
| CServer Certificate | | | |
| When secure message must be sent to this agent, a r the message with the public certificate listed here. Th be decrypted by this machine. The private key is store certificate store as a personal certificate and known o By default, a self-signed certificate is generated by th configuring here to handle this encryption task. You r use of your own certificate. If you specify your own cert to ensure that the certificate is valid and has not been | emote machine e lat message can ti ed in the local cor only on this machi e machine you ar may, however, spe ertificate it will be n revoked. | ncrypts hen only nputer ne. e cify the verified | |
| Certificate search type: | | | |
| Use a self-signed certificate A self-signed certificate will be created as needed. not be validated to ensure it has not been revoked generated periodically. | This certificate w . A new certificat | ill ↓ e is | |
| | | | |
| Cancel Save | | | |
| | | | |

Enter the following information:

- User Name: Enter a valid Windows account in domain\user or machine\user format. This account will be used to access files that need to be processed by SureSync MFT.
- **Password/Repeat Password**: Enter the password for the account twice.

Optionally, you have some encryption options for the credentials. By default, a new self-signed certificate will be generated. You can also use your own certificate to encrypt the credential as long as that certificate is in the local certificate store.

Click the 'Save' button to save the credential.

Click the 'Next' button to continue and click the 'Finish Server' button on the final panel to save the computer configuration to the MFT database.

Repeat this process to add each computer you're planning to use in SureSync MFT. This step should be done before creating a Job any time a new computer is involved. The computers must be added first to appear in the Job wizard.

Creating the Jobs

Jobs are the basic building blocks of SureSync MFT. Each Job contains the root paths (source and destination paths) that apply to that Job and options for the Job. Each Job also contains one or more Rules that tell SureSync MFT how to replicate & synchronize data. The Job and Rule are created together in one wizard.

The Job and a default Rule are defined in one wizard. The default Rule processes all files in the root path(s). The Rule uses a mirror for one-way paths and a multi-mirror for multi-directional paths. The Rule can be altered using the SureSync MFT Desktop after creating it.

The wizards are designed to quickly configure the basic options needed to get a Job configured. SureSync MFT is a flexible product with many advanced options. Additional options can be specified on the properties panels for the Job after it has been created.

Click on the Job button (^{Job}) in the ribbon bar to launch the Job. The Job Wizard will be used to configure your Job.

Name Your Job

The first panel of the wizard allows you to name the Job and provide an optional description.

Since we want to use File Locking in this scenario, you should also check the 'Check if file locking is to be used for this Job' option.

| Create Job | _ | |
|---|---|--|
| Job Properties | | |
| What would you like to name this Job? | | |
| Documents | | |
| Description | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Use File Locking Check if file locking is to be used for this job | | |
| Use File Locking Check if file locking is to be used for this job | | |
| Use File Locking L Check if file locking is to be used for this job | | |

Click the 'Next' button to continue.

Set Job Properties

The 'Set Job Properties' panel allows you to define options related to adjusting priority and scheduling. By default, all Jobs inherit a default "Always On" Interval Set that provides real-time processing of changes.

| Priority Adjustment | Set a value between -100 and 100 to be used to adjust the priority for all files copied using this Job. Higher values are higher priorities. All priority adjustments for a file ar added together to determine the scheduling priority of the action. |
|---------------------|--|
| Sequence | 100 then their name. This ordering is important if you use a schedule on the Job Group. |
| | Set the default scheduling for all root paths in this job. |
| | If your Job or any parent Job Group specifies a Schedule, that schedule will be used and applied to all items below, overriding and ignoring any specifications made on the the contained items. Intervals can be inherited, but do not override any other items. |
| Scheduling | Intervals will continuously monitor your system for changes using the file system Change Journals. You can specify times when actions should be delayed or should have different priorities. |
| Seriessing | Schedules will start, stop, and repeat using your Schedule definition. You can place a Hold on a Schedule definition to prevent starting any items linked to that Schedule. You can also hold the processing of any individual item linked to a schedule. Schedules can trigger running scripts. |
| | If Inherit is specified for scheduling and no parent item specifies a Schedule or Interval Set, the "Always On" Interval Set is used. |
| | (Inherit From Parents) 🔻 |

Click 'Next' to continue.

Add Your Root Paths

The 'Create Root Paths' panel is used to specify the paths that the Job should process files within. All of the paths involved, both source and destination, must be listed here.

| | | destination root Path. | | |
|--------|--|------------------------|--|--|
| Name 7 | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Click on the 'New Root Path' button to add your first Root Path. The following dialog will be displayed:

| Job | | | | | | |
|----------------------|--|---|--|--|--|--|
| | Source | | | | | |
| | Destination | | | | | |
| Root Path Usage | Archive Destination | | | | | |
| | Multi-way rules apply if both Source and Destination are checked, otherwise one-way rules apply. | | | | | |
| | Enable all actions | | | | | |
| State | O Queue actions, but do not execute actions. Allow scans. | | | | | |
| | Disable all actions | | | | | |
| Agent | Select agent to access Root Select the Agent | it to be used to access the Root Path. | | | | |
| File Storage | Select the file storage type or storage account. FTP "Computers and Volumes", "Storage Accounts". | and other storage types are defined und | | | | |
| - | Windows File System 🔹 | | | | | |
| Path | Enter the Path or use Browse to set path | Browse | | | | |
| Optional Credentials | Set Credentials Set credentials required to acc | ess the Root, if needed. | | | | |
| Test if root exists | Test Root Path | | | | | |

The 'Root Path Usage' of this panel provides a 'Source' and 'Destination' check box. A Root Path can be a source, destination or both (multi-directional Rules).

For this example, the paths will be C:\Documents on the *DEV20*, *SPITEST-WIN2K8* and *SPITEST-WIN2K12* machines.

A completed panel for a path would look like the following screenshot:

| eate Root Path path and credentials | | | | | | - C |] |
|--|--|---|--|---------------------------|---------------|---------------------|----|
| Job | | | | | | | |
| Root Path Usage | Source Control Destination Archive Destination Multi-way rules agaptly. | ation pply if both Source : | nd Destination a | re checked, c | otherwise on | e-way rule | s |
| State | Enable all activ Queue actions Disable all activ | ons , but do not execut ons | actions. Allow se | cans. | | | |
| Agent | dev20 🔻 Selec | t the Agent to be u | ed to access the | Root Path. | | | |
| File Storage | Select the file store "Computers and V Windows File Sys | ge type or storage blumes", "Storage A tem ▼ | account. FTP and ccounts". | other storag | e types are o | defined un | de |
| Path | C:\Documents | | | | | Browse | |
| Optional Backup Path | If desired, enter a | <i>backup path</i> f days before back . Zero indicates no | p copies are pure deleting of backu | ged based or p copies. | n when the b | Browse ackup cop | |
| Optional Credentials | Set Credentials | Set credentials re | uired to access t | he Root, if ne | eded. | | |
| Test if root exists | Test Root Path | | | | | | |
| | | | | | | | |
| | | | | | Cancel | < Back | |

The following configuration options have been set:

- **Root Path Usage**: Since this is a multi-directional file locking Job, the 'Source' and 'Destination' checkboxes should be checked.
- **Agent**: For each path, you select the machine the path resides on from the 'Agent' dropdown.
- Path: Enter the path from the perspective of that machine as a local drive letter.



Click the 'Next' button to continue.

| | Usually your Root Paths inherit their scheduling from their Job or a Job Group. If your Job or Group is | | | | | |
|------------|--|--|--|--|--|--|
| | configured to use Intervals, you can specify a specific Schedule for your Root Path. | | | | | |
| Scheduling | If your Job or any parent Job Group specifies a Schedule, that schedule will be used and applied to all items below, overriding and ignoring any specifications made here. | | | | | |
| | Intervals will continuously monitor your system for changes using the file system Change Journals. You can specify times when actions should be delayed or should have different priorities. | | | | | |
| | Schedules will start, stop, and repeat using your Schedule definition. You can place a Hold on a Schedule definition to prevent starting any items linked to that Schedule. You can also hold the processing of any individual item linked to a schedule. Schedules can trigger running scripts. | | | | | |
| | If Inherit is specified for scheduling and no parent item specifies a Schedule or Interval Set, the "Always On" Interval Set is used. | | | | | |
| | (Inherit From Parents) 🔻 | | | | | |
| | | | | | | |

On the next panel, we will accept the defaults and click the 'Finish Root Path' button to add the path.

| 🚺 C | reate Root Path | | | - | - 🗆 | × |
|-----|---|-------------------------------------|---------------------------------|------------------|------------|--------|
| Set | options | | | | | |
| | Create Root | Check if Root can be created. | | | | |
| | Permissions | Check if permissions can be copie | ed to Root. | | | |
| | Copy Created | Check if the file creation dates sh | ould be copied to this root pat | h when files are | copied. | |
| | Use Change Journal 🗹 Monitor this root folder for content changes using the Change Journal. | | | | | |
| | Ignore Case Ignore case for file name changes. | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | | |
| | | | Cance | I < Back | Finish Roo | t Path |

Repeat the process to add all of the root paths. Back on the 'Create Root Paths' panel of the 'Create Job' wizard, you should now have a panel that looks like this:

| eate Job | | | | - | |
|--|---|---|-----------------------|----------------|-----------|
| te Root Paths | | | | | |
| "Root Paths" define the you need at least one s | folders to be synchroniz ource Root Path and at le | zed. Only one Root Path is require east one destination Root Path. | ed if you only have a | Delete rule, c | otherwise |
| Name | T | | | | |
| [dev20] C:\Document | s | | | | |
| [spitest-win2k12] C:\[| Documents | | | | |
| [spitest-win2k8] C:\De | ocuments | | | | |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | New Root Path | Edit Root Path | Remove Roo | ot Path |
| | | | | | |
| | | | | | |
| | | | C | ancel < Ba | ack N |

Click the 'Next' button to continue. Finally, click the 'Finish Job' button on the next panel to save the Job to the MFT database.

The wizards are designed to get the Job configured with a set of default options quickly and easily. If you want to enable advanced features such as NTFS Security copying or Advanced Open File Support (VSS), those can be enabled on the Rule Property Sheets The Job will be saved in a disabled state, meaning no files will be processed. To enable processing, you must click on the Job in the SureSync MFT Desktop, select 'Enable All Actions' on the General tab of the Job and click the 'Apply' button.

| Job Docume | nts Define Root Paths | Define Rules | Finich | |
|------------------|---|---------------------------------|-----------------------|--------------|
| Description | Jenne Koot Patris | Denne Kules | 1111311 | |
| | | | | |
| | C Enable a | lactions | | |
| State | Queue ac Disable a | ctions, but do n Ill actions | ot execute actions. A | Allow scans. |
| Use File Locking | Check if file lo | cking is to be u | sed for this job | |
| | | | View Errors | Cancel Apply |

Configuring E-mail Alerts

E-mail alerts are part of the Alert system within SureSync MFT and can be a useful way of notifying the administrator of a problem that should be investigated.

Configuring a SMTP Profile

To start the configuration of e-mail alerts, you should click on the Options (^{Options}) button in the Ribbon bar. Click on the "Alerts" tab to access the appropriate configuration panel.

The first item configured is the SMTP Profile. The SMTP Profile provides SureSync MFT with the necessary details about your SMTP e-mail server so the program can send e-mail messages to you.

| TP Profiles Alert Profiles | Default Alerts | | | |
|-------------------------------|--|-------------------|-------------|-------------|
| SMTP Profile is needed to a | lefine how email messages are transmitted when an aler | t message must be | e sent. Ale | rt Profiles |
| elect an SMTP Profile to disp | olay, edit, or delete: | | | |
| | | - | New | Remov |
| Des Els Norres | Codes CMTD DesEls Manage | | | |
| Profile Name | | | | |
| SMTP Server | Enter SMTP Server Name | | | |
| Port | 1 Use TLS encryption | | | |
| Sender Name | Display Name of Alert Sender | | | |
| Sender Address | E-Mail address of alert sender | | | |
| Reply Address | E-Mail address for replies | | | |
| SMTD Server Credentials | Click to set the SMTP server credentials | | | |

To create a SMTP Profile, click on the "New" button on the SMTP Profiles tab.

The following fields must be configured:

- **Profile Name:** The name of the profile that you are configuring. For example, you might use the name of the SMTP server.
- **SMTP Server:** The server address of the SMTP server. For example, smtp.mail.com.
- **Port:** The SMTP port for the SMTP server. The default SMTP port is 25.
- Use TLS Encryption: If your SMTP server requires encryption, check this box.
- Sender Name: The name that will appear in the From: field of messages sent by SureSync MFT.
- Sender Address: The e-mail address that will appear on messages sent by SureSync MFT.
- Reply Address: The reply address that will appear on messages sent by SureSync MFT.

You can also define SMTP Server Authentication settings if your SMTP server requires a valid logon to send messages (most do). To define a credential, click the 'Click to set the SMTP server credentials' button. The following fields will be presented:

- **User Name:** The username that SureSync MFT will log into this SMTP server with when sending an e-mail alert.
- **Password:** The password for the username defined in "User Name" should be entered here.
- **Repeat Password:** The password for the username defined in "User Name" should be confirmed here.

Click "Apply" to save the SMTP Profile.

Configuring an Alert Profile

The second part of configuring E-mail Alerts is to define an Alert Profile. The Alert Profile defines the e-mail address(s) that will be sent messages when errors occur. To configure an Alert Profile, click on the Alert Profiles tab and click the "New" button.

| 🚺 Options |
|-----------|
|-----------|

| n Alert Profile defines a rofile used for sending (| set of email recipients, options for sending alerts to the pe email. | rson or group, and a link to the SMTP |
|--|---|---------------------------------------|
| elect an Alert Profile to | display, edit, or delete: | |
| | | New Remov |
| Profile Name | Enter Alert Profile Name | |
| Recipient Address(es) | Enter recipient's email address | |
| SMTP Profile | Select an SMTP Profile | , |

The following fields need to be configured:

- **Profile Name:** The name of the profile.
- **Recipient Address(es):** The e-mail address(es) that SureSync MFT will send the alert messages to.
- **SMTP Profile:** The SMTP profile that will be used to send the message.

Multiple e-mail addresses can be added by separating the addresses with commas (,) or semi-colons (;). This allows you to easily send messages to a group of SureSync MFT administrators.

Configuring Alert Filters on the Job

The final step for receiving e-mail alerts is to define an Alert Filter on the Job. Expand the Job in question and click on the 'Alerts Filters' node on the left-hand tree view of the SureSync MFT Desktop as highlighted below.



Click on the Alert Filters icon in the Ribbon Bar to launch the Alert Filters wizard

| | | | Sure | Sync MFT | Desktop | - Software Pursuits | _ | \times |
|------------|--------------|----------|---------|----------|---------|---------------------|---|----------|
| Home | Managed File | Transfer | | | | | | 0 |
| | 重 | 7 | • • | ۲ | | | | |
| Enterprise | File Status | Alert | Options | Licenses | Videos | | | |
| Status | and Logs | | | | | | | |
| St | atus | Create | | Actions | | | | |

The 'Create Alert Filter' wizard will be loaded. The drop down allows you to select an existing Alert Profile or you can click the 'Create Alert Profile' button to create a new one.

| Create Alert Filter | - | _ | | × |
|---|------------|---------|----|------|
| Select Alert Profile | | | | |
| Select the Alert Profile to be used with this Rule Set. To define a new profile, click on the "Create Alert These alerts will be in addition to any configured default alerts. | t Profile" | button. | | |
| SureSync MFT Admins | | | • | |
| Create Alert Profile | | | | |
| | | | | |
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| Car | ncel | < Back | Ne | xt > |

Select the appropriate Alert Profile from the drop-down and click the 'Next' button to continue.

Alerts can also be defined globally to apply to all Jobs in the SureSync MFT database. This is done on the Alerts tab of Options by clicking on the 'Default Alerts' tab and defining an Alert Profile. This results in less configuration work but can produce substantially more alerts.

| Filter Type 🛛 🔻 | Active | |
|---|--------|--|
| Job Failure | | An alert is sent if a job or Rule Set aborts unexpectedly. |
| Offline | | An alert is sent if a path is offline for more than a specified number of minutes. (Zero = every occurrence.) |
| Schedule Missed | | An alert is sent if a Scheduled execution time is missed or a Schedule is terminated due to a Termination Time. |
| File changed in multiple locations | | An alert is sent if a file is changed in multiple locations and the condition must be manually resolved. |
| Unlicensed | | An alert is sent if an unlicensed machine or product is accessed. |
| Machine Identification | | An alert is sent if a machine's identity failed verification. This could be an attempt at unauthorized access. |
| Login Failure | | An alert is sent if an agent or UNC path login fails. This could be an attempt at unauthorized access. |
| Other Warnings | | An alert is sent for all other a warning level errors that persists after any retries. |
| Other Exceptions | | An alert is sent for all other exception level errors. |
| Completion | | An alert is sent when a job, schedule, Or monitor completes Or terminates. This is sent if the job had errors or not. |
| Rule Set Enabled | | An alert is sent when a Rule Set has been enabled. |
| Rule Set Disabled | | An alert is sent when a Rule Set has been disabled. |
| Root Path Enabled | | An alert is sent when a Root Path has been enabled. |
| Root Path Disabled | | An alert is sent when a Root Path has been disabled. |
| Schedule Started | | An alert is sent when a Schedule has started. |
| Rule Set or Root Path is Deleted | | An alert is sent when a Rule Set or a Root Path is deleted. |
| Rule Set or Root Path is Added or Altered | | An alert is sent when a Rule Set or a Root Path is added or altered. |
| Restore Action Completed | | An alert is sent when a file or folder restore operation completes. |

Cancel < Back Finish Alert Profile

Check the alert types you would like to have an e-mail alert generated for and click the 'Finish Alert Profile' button to create the Alert Profile for the Job.

Monitoring the Environment

Monitoring your SureSync MFT Jobs is important, and this process is made easy by the various status panels.

Detailed Status

The Detailed Status panel will show you live file level activity for a selected Job. It also includes common counters such as files added and files deleted and details about the backlog of work to be performed.

To launch Detailed Status, click on the Job you would like to view status information about and



then click on the 'Detailed Status' button (Detail Status) in the Ribbon Bar.

| <u>5.</u> | SureSync MFT Detailed Status - Software Pursuits | | | | | | | |
|-------------------------------|--|------------------------------------|----------------|-----------------------|------------------------------------|-----------------|--|--|
| Enable/Start Disable/Stop Mi | ore • | Enterprise File St Status and L | atus Alerts | Freeze/Tha Display | w Help | | | |
| Actions | THUN | Hey 20 | view | | | | | |
| MP | Job | Mirror | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Completed Actions | | | | | | | | |
| 3 Files Scanned | | 294 Adde | d | | 0 Exceptions 41.9MB Cop | pied | | |
| 0 Folders Scann | ed d | 0 Repla | ced | | 0 Warnings & Errors 48.9MB Byt | es Transmitted* | | |
| 1,931 Journal Events | * | 0 Altere | ed | | 00:40:22 Elap | psed | | |
| - Danding Actions | | | | | | | | |
| 24 Active Actions | | 0 Activ | e Scans* | | 0 Retries Oueued | | | |
| 112 Actions Queue | ed* | 0 Queu | ued Folder Sca | ans | 0 Unresolved Alerts | | | |
| 10.1MB To be Copied | | 0 Quei | ued State Scar | 15 | 0 Total Unresolved Alerts | | | |
| File Name | Action | Bytes Copied | % Complete | Duration | Source Folder | | | |
| Test220Model - Copy (2).accdb | Сору | 292KB of 292KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test221Model - Copy (2).doc | Сору | 27KB of 27KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test222Model - Copy (2).docx | Сору | 12KB of 12KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | = | | |
| Test223Model - Copy (2).mdb | Сору | 208KB of 208KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test224Model - Copy (2).xls | Сору | 25KB of 25KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test225Model - Copy (2).xlsm | Сору | 11KB of 11KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test226Model - Copy (2).xlsx | Сору | 11KB of 11KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test229Model - Copy (2).doc | Сору | 27KB of 27KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test227 - Copy (2).txt | Сору | 901KB of 901KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test228Model - Copy (2).accdb | Сору | 292KB of 292KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |
| Test230Model - Copy (2).docx | Сору | 12KB of 12KB | 100% | 0:00:01 | [dev20]C:\MFT Test Folders\Mirror\ | | | |

Enterprise Status

The Enterprise Status panel provides a centralized view of all the SureSync MFT tasks in your environment, even when there are multiple Hub servers. This provides an easy way to stay current on the status of all your Jobs, no matter where they are running.



Enterprise Status can be launched by clicking on the "Enterprise Status" button (Status) in the Ribbon Bar in the SureSync MFT Desktop.

| MFT Enterprise Status - Software Pursuits | | | | | | | | | | | - | | × |
|---|------------|----------------------|---------------------------------|--------------|-----------------|-------------------|-------------------|-----------------|----------|--|---|--|------------|
| Enable/Start Disable/Stop Hub Servers Enable All Disable All Actions | Detailed S | tatus Alerts | File Status and Logs View | Deptions Hel | p | | | | | | | | ∧ Ø |
| Use the "spin down" button to the left of a row to expand a group or to display additional details. Click on a column heading to sort by that column. Use Shift-Click to add columns to the sort. | | | | | | | | | | | | | |
| dol | Alerts | Warnings & Errors | Exceptions | Bytes Copied | Bytes Queued | Active Actions | Queued Actions | Active Locks | Compares | | | | |
| 🖝 📧 🧾 Job Group: (Default Group) | 0 | 0 | 0 | 63.5MB | 0KB | 0 | 0 | 0 | 488 | | | | |
| 🗆 🗉 💽 Documents | 0 | 0 | 0 | OKB | OKB | 0 | 0 | 0 | 0 | | | | |
| 🗆 🗉 📚 Mirror | 0 | 0 | 0 | 63.5MB | OKB | 0 | 0 | 0 | 488 | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
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File Status

The File Status panel provides status about current and pending activity from a number of different perspectives. This panel can be extremely helpful when you want to determine how much work remains to bring folders on the various machines in the environment current.

In addition, File Status provides the ability to review Action Logs and process Alerts.

Details on how to use each tab of File Status can be accessed by pressing F1 on the appropriate tab to access context sensitive help.

| 1 | SureSync MFT File Status | | | | | | | | | |
|------------|---|---|------------------------------------|----------------------------|--------------------------------------|---|--------------------|----------------|--|-----|
| Home | Root Path Summary | Browse Files | Browse Jobs | Actions Log | 🛕 Alerts | | | | | ▲ 🔞 |
| dev20 | Enable Root Path Di | sable Root Path | Hub Servers | Detail Status Ent | erprise Status | | | | | |
| | Actio | ons | | Viev | v | | | | | |
| Sys Mos | stem-Wide Status and St t statistics are reset for a | tatistics (Click to a specific root pa | expand or colla th when the roo | pse) ot path is enabled | . Additional sta | tistics are reset whe | n a Job or machine | e are enabled. | | |
| | 3 Items Scanned 0 Folders Scanne | ed | 485 Added 0 Replaced | | 0 Queued De | stination Copies | 63.5MB Copied | | | |
| | 0 Queued Folder | r Scans | 3 Deleted | | 0 Queued De | letes | 0KB Bytes T | ransmitted* | | |
| | 488 Compares | | 0 Altered | | 0 Queued Alt | ers | 0KB Queue | ł | | |
| | 0 Active Actions | | | | | | 2,214 Journal | Events* | | |
| | 0 Machines Offline 0 U 0 Volumes Offline 3 F | | 0 Unresolved 3 Resolved A | l Alerts 1,9 lerts | 59 Total Files in 13 Total Folder | in Database 2,988 State Items in Data ers in Database 1,461 State Records Crea | | | | |
| • | dev20 (Hub) Detail | ls | | | | | | | | |
| - | spitest-win2k12 De | etails | | | | | | | | |
| | spitest-win2k8 Det | tails | | | | | | | | |
| | | | | | | | | | | |