



**Collaboration Bundle  
Evaluator's Guide**



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## Introduction

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SureSync is a powerful file replication & synchronization application that can be used to ensure users on your network are always working off the most recent version of critical files, for disaster recovery purposes, software distribution, and much more.

This evaluator's guide is designed to walk you through the initial setup of the SureSync product with the Communications Agent and File Locking Add-Ons. This set of licenses is referred to as the Collaboration Bundle. With this bundle, powerful collaborative file sharing environments can be created. By reviewing this guide, you will become familiar with how to use SureSync and the Communications Agent to implement an efficient and powerful synchronization / replication infrastructure in your network.

## System Requirements

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SureSync's basic operating system and hardware requirements are:

- **Supported Operating Systems:** Windows Server 2022; Windows Server 2019; Windows Server 2016; Windows Server 2012 R2; Windows Server 2012; Windows Server 2008 R2 with SP1; Windows 11; Windows 10; Windows 8.1; Windows 8; Windows 7 SP1
- **Processor:** Minimum: Dual-core CPU of at least 2.5Ghz; Recommended: Quad-core CPU or greater of at least 2.5Ghz
- **RAM (total for system):** 4GB of free memory (recommended minimum)
- **Hard Disk:** 100MB for application files; 20MB+ for database

For File Locking, ReFS volumes are not supported on Windows 2008 R2, Windows 2012 or Windows 7.

SureSync can synchronize data to operating systems such as Windows 2008, and non-Windows machines such as Mac and Linux via UNC path but the software itself must be installed on one of the supported operating systems.

### Virtualization

SureSync can be run on Windows operating systems hosted in virtualization software such as VMWare or Hyper-V without issue. Each virtual machine involved in the synchronization / replication requires appropriate licensing.

### *SureSync Database Requirements*

SureSync requires a SQL database to store configuration information. The following versions are supported:

- SQL Express 2012, 2014, 2016, 2017, 2019 and 2022
- SQL Server 2012, 2014, 2016, 2017, 2019 and 2022

While SureSync will operate with older versions of SQL Server, it is strongly recommended to use the newest possible release to take advantage of performance and reliability enhancements in those versions of SQL Server.

SureSync requires some 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 4.8
- Microsoft Visual C++ Runtime 14.0 Update 3

Please note that using the SureSync installer to install these prerequisites could result in a reboot being necessary before the setup can continue. If a reboot is necessary, the installer will prompt you. In environments where a reboot is disruptive, we recommend installing the required components manually during your normal maintenance schedules and then proceeding to install SureSync.

## Contact Information

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

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

## Required Add-Ons for File Locking

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To use File Locking, you will need to license the base SureSync product, the Communications Agent Add-On and the File Locking Add-On for each machine involved in the synchronization. This section outlines the functionality provided by the required Add-On licenses.

### **Communications Agent Add-On**

The Communications Agent is a powerful Add-On license for SureSync that contains a number of performance enhancing features. This license is required to perform File Locking.

- **Real-Time Monitors**  
Real-Time processing increases data availability by continuously monitoring data for updates. By processing files immediately after they change, SureSync can avoid folder scans that are necessary for scheduled jobs.
- **Remote Differential Compression (RDC)**  
RDC copies only the changes made to a file, reducing synchronization time and decreasing the consumption of network resources.
  - **RDC to Non-Windows Machines**  
If you map a non-Windows drive to a drive letter on a Windows machine you can process delta copies to that non-Windows machine. This in turn provides bandwidth savings between any machines, regardless of the OS.

- **File Compression**  
Transmit files in a smaller package across your network by compressing them. File compression is particularly useful on slow network connections.
- **TCP/IP Transmissions**  
Transmissions across the Internet give you more options on how you connect to remote machines. Now it is even easier to keep office branches connected to the information they need.
- **Encryption**  
Ensure your files are being transmitted securely by encrypting each file transmission. Multiple FIPS certified encryption algorithms are available. This is an especially useful and necessary option when transmitting sensitive data across the Internet.
- **Change Journal Support for Schedules**  
When a Schedule is configured to run a Job using the Communications Agent Add-On, SureSync uses the NTFS Change Journal to minimize the amount of scanning performed. Eliminating much of the scanning creates a significant performance improvement for Schedules.

### **File Locking Add-On**

The File Locking Add-On requires the Communications Agent to be licensed and in turn gives you an additional benefit in file sharing environments. The File Locking Add-On eliminates the possibility that a file could be changed on multiple sides of a synchronization resulting in a more efficient synchronization with zero risk of lost changes. A user who attempts to open a file that is already in use will receive an indication from the application that the file is locked.

## **Other SureSync Add-Ons**

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Software Pursuits also offers additional Add-On products for SureSync that provide additional functionality. The available Add-On products include:

### **ArchiveSync Add-On**

SureSync's ArchiveSync Add-On allows users to create versioned backup copies of files, providing an efficient disk-to-disk backup solution. Versioned file copies allow users to quickly restore files to a specified point-in-time, without sifting through tape backups. Additionally, when archiving or restoring, the ArchiveSync Add-On will allow you to backup and restore security privileges.

Archiving can be done in real-time to continuously protect data, effectively eliminating tight backup windows during the evening. ArchiveSync will also automatically thin out your archive to clean storage up.

Please consult the [SureSync with ArchiveSync Add-On Evaluator's Guide](#) for further details.

## **What is File Locking?**

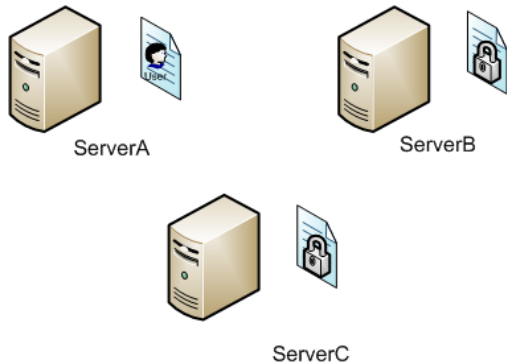
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The File Locking Add-On is a powerful enhancement to SureSync that makes it simple to collaboratively share files between multiple offices while ensuring that users cannot make changes to the same files at the same time.

The File Locking Add-On 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 "Server C." These

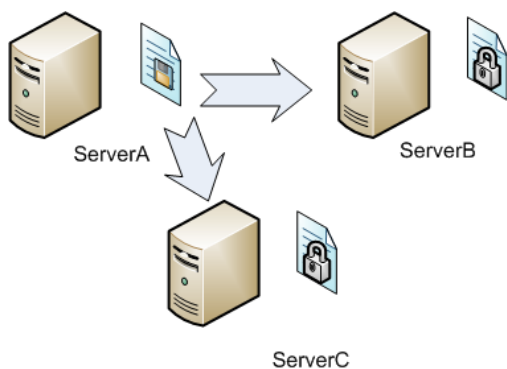
machines all contain a copy of a file share that is being synchronized by SureSync with a Real-Time Monitor.

File Locking does not block users on the server where the initial open occurred. For example, if a user opens the file on Server A then SureSync's locks will 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.

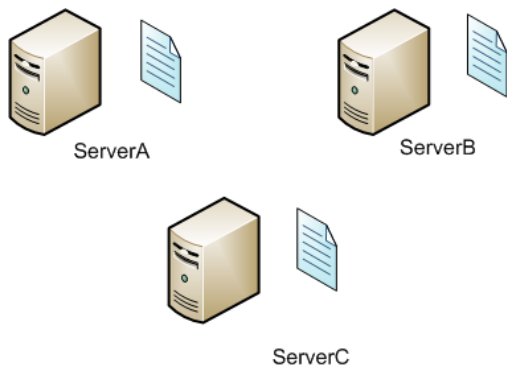


While the file is locked with the File Locking Add-On, no other user can access a write-enabled copy of the file. For example, if a user attempted to open the "Document1.doc" file on "ServerB," they will open a read-only copy. With the SyncLockStatus Add-on installed on the client, a tray notification can be provided about the user encountering the lock.

Once the user completes their changes to the "Document1.doc" file on "ServerA," saves those changes and closes the file. SureSync will immediately replicate the changed version of the file to "ServerB" and "ServerC."



As soon as the file has been synchronized to the other machines, the lock on the file will be released by SureSync. Users can then access the updated file with write access from any of the machines.



If a user opens the file again on one of the paths, then the locking process will repeat itself, ensuring that only one user has write access to the file at any given time.

## Supported Applications

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Applications use handles to open files. Applications can open a file, establish the open file handle and that lets the operating system and other applications know that the file is currently open. Applications that work this way are supported by the File Locking Add-On. An application can also open a file, read the file into memory, and then release the open file handle on the file. With applications that open files in this way, the File Locking Add-On is unable to determine that the file is open and no lock will be established.

The application opening the file determines if locking will function, not the file type. For example, if you open a .txt file in Notepad, that .txt file will not be locked. This is because Notepad does not establish and maintain the required handle in the file system when it opens the file. On the other hand, if you open that same .txt file in Microsoft Word a lock will be established because Word properly established and maintains the open handle in the file system.

This list contains applications that Software Pursuits has tested the File Locking Add-On with and have determined that locking will occur. This list is not comprehensive as there are far too many applications available on the market to provide a complete list. We will continue to update this list as we test additional applications and as we receive feedback from customers. If an application that supports multiple file types appears on this list, all compatible file types should be lockable.

### Supported Applications

- Autodesk AutoCAD
- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Publisher
- Microsoft Visio
- Microsoft Access
- Adobe InDesign
- Adobe PageMaker
- QuarkXPress
- OpenOffice.org Writer
- OpenOffice.org Calc
- OpenOffice.org Draw
- OpenOffice.org Impress
- OpenOffice.org Math

- OpenOffice.org Base

#### Unsupported Applications

- Adobe Illustrator
- Adobe Photoshop
- Adobe Acrobat
- Macromedia Dreamweaver
- Microsoft Wordpad
- Microsoft Notepad

## Expected Application Behavior when Encountering Locks

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File Locking establishes a lock on a file at the file system level. 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 SyncLockStatus application can be used to provide pop-up notification from the system tray on an end user's computer when they 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.



**This is a test Word document in .DOCX format.**

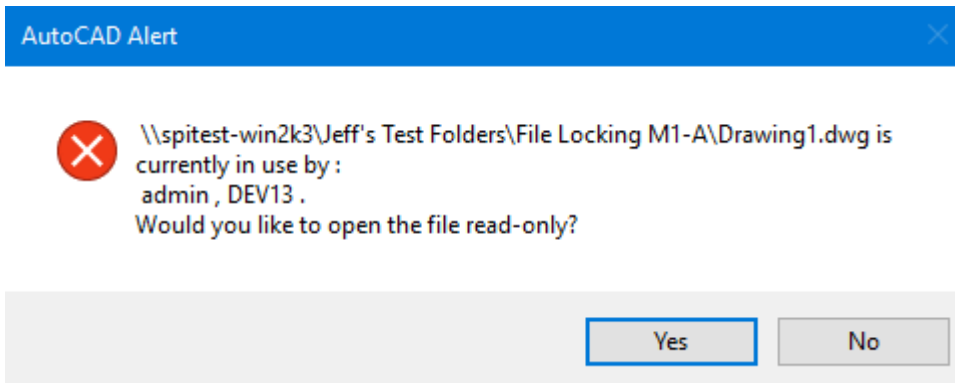
Change 001

End of document ■

### AutoCAD

In AutoCAD, an alert like the one below is presented allowing the user to open a read-only copy.



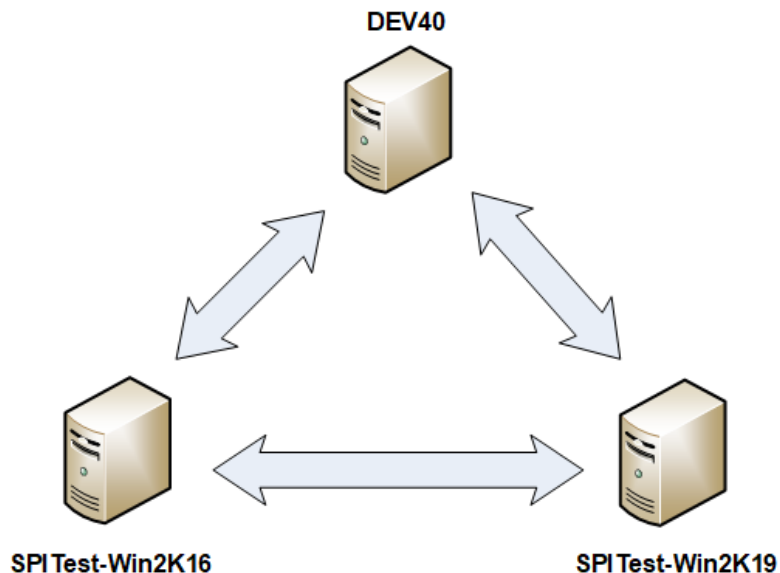


## Our Scenario

This guide will walk you through the configuration of SureSync using the Communications Agent and Communications Agent File Locking Add-Ons to accomplish a multi-directional synchronization between three servers. The three machines in questions are named *DEV40*, *SPITest-Win2K16*, and *SPITest-Win2K19*. The folder being synchronized will be C:\SalesData on each machine.

With this common scenario, users on any of the machines will be able to make changes to the monitored directories and those changes will be reflected on the other servers. This includes additions, deletions, and modifications. This scenario is further enhanced with file locking.

File locking is only available with Real-Time Monitors using multi-directional Rules. File Locking cannot be performed with a Schedule. Communications Agent and File Locking licenses are needed for each machine involved.

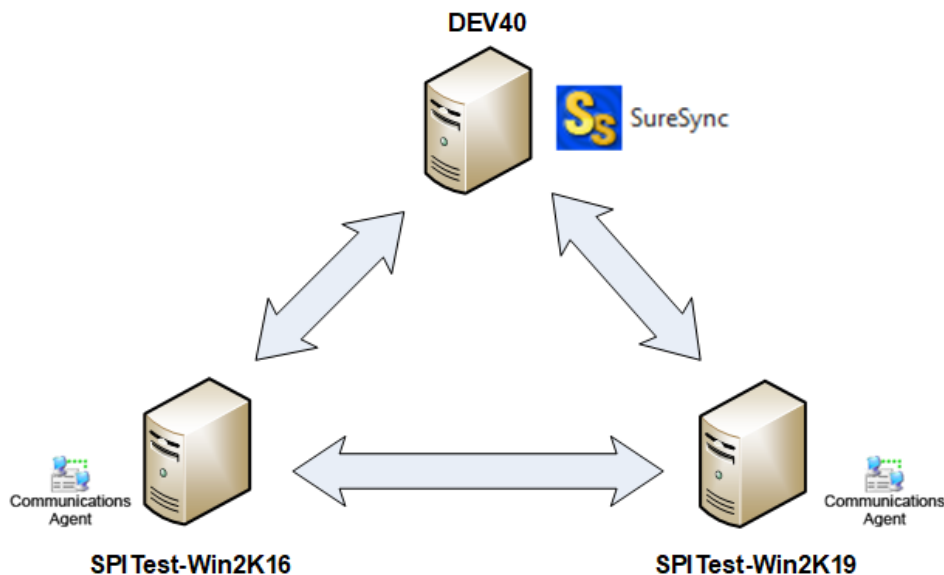


## Installation

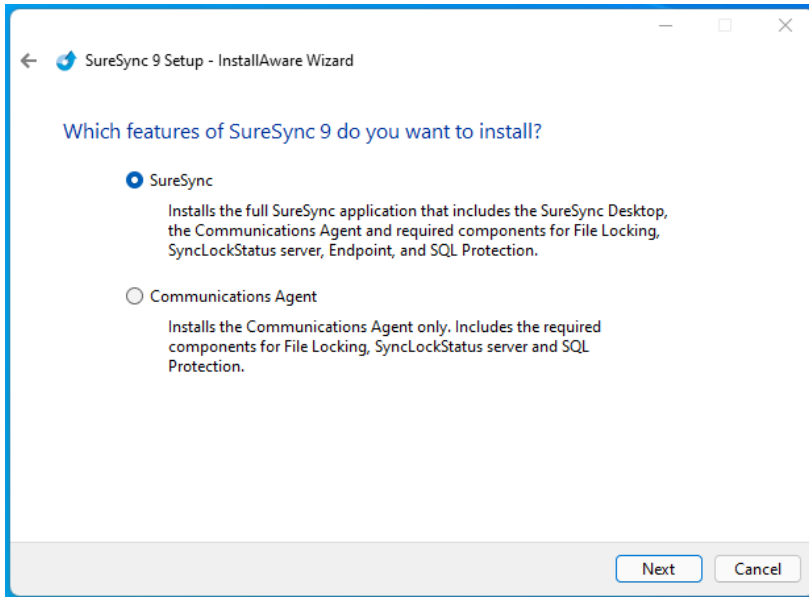
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To begin your SureSync trial, you must install the correct SureSync components on the right machines. SureSync is installed using a Windows Installer (MSI) driven installation application. SureSync and all Add-On products are installed using the same installer.

For this scenario, the full SureSync application will be installed on one machine (*DEV40*) and the Communications Agent will be installed on the other two machines (*SPITest-Win2K16* and *SPITest-Win2K19*) as illustrated below. The file locking components are included in both the SureSync and Communications Agent installs.



On the *DEV40* machine, we will run *SureSync9Setup.exe* and select SureSync as the installation type in the installer. This will install SureSync, the Communications Agent and the File Locking driver. This action also designates *DEV40* as the machine where we configure and run our synchronization job.



On the *SPITest-Win2K16* and *SPITest-Win2K19* machines, the Communications Agent installation should be performed. This is accomplished by launching *SureSync9Setup.exe* on those machines and selecting “Communications Agent” as the installation type. This will install the Communications Agent and the File Locking driver.

## Launch SureSync for the First Time

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Now that the required components have been installed, we can continue with the configuration. To launch SureSync for the first time, go to the Start menu, select the SureSync 9 folder and click on the SureSync 9 Desktop icon. This will launch the SureSync Desktop where you will perform your entire synchronization job configuration.

On the first launch of the application, SureSync will present you with a series of questions to aid in completing the initial configuration.

### **Creating a SureSync Database**

The first dialog displayed is used to create or open an existing SureSync database. The database is used to store your synchronization/replication configuration and related information.

Click on the 'Create a new database' button to continue.

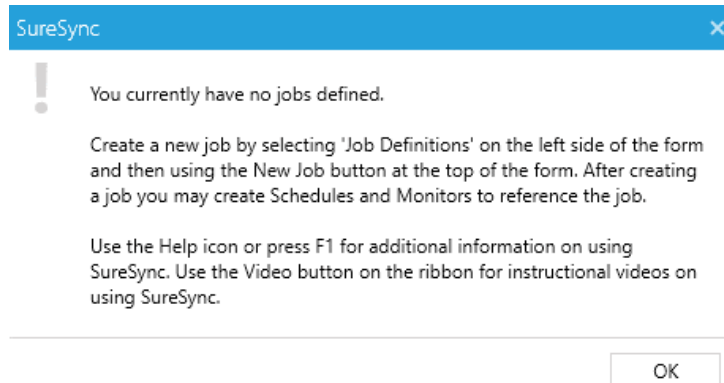
Enter the following information to create the SureSync database:

- **Name of the SQL Server and any Instance Name:** Enter the name of the SQL server and an instance name if used. For example, dev40\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 deprecated 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\SureSync.mdf.

If you want to use Windows authentication with the SQL database, you can click 'Continue' to create the database.

If you want to use SQL authentication with the SQL database, you will click on the 'Set SQL Database Credentials' button to provide the credential. After that, you can click 'Continue' to create the database.

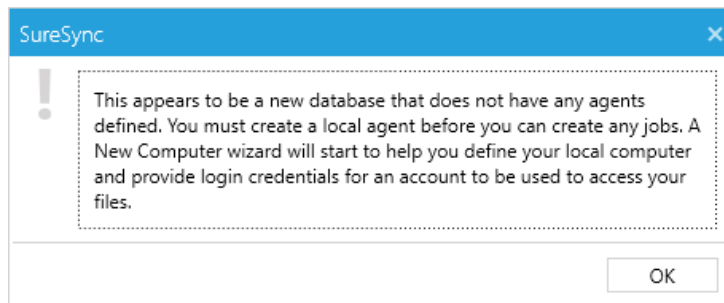
Next, the following dialog will be displayed:



Click 'OK' to continue. The help file will be displayed that can either be reviewed now or closed.

### **Configuring the Local Communications Agent**

The next step in the initial configuration involves defining a credential for the local Communications Agent to run under.



Click "OK" and the Communications Agent Configuration panel will be launched.

The local Communications Agent must be given a credential for SureSync to function properly. We recommend this account be either a local administrator on the machine or a domain administrator to ensure rights to all the files and folders being synchronized. The local Communications Agent must be configured even if you're not licensed for the Communications Agent Add-on. The Add-on functionality is enabled by a license but the Communications Agent on the SureSync machine is responsible for all the basic I/O as well.

**Create Computer Configuration**

**Computer Name**

You only need to add machines that will be running a Software Pursuits Communications Agent Service that will be accessed by SureSync jobs. Machines accessed via UNC paths do not need to be added. SureSync Endpoint client machines do not need to be added here. An agent is always required on the machine running the jobs and a Scheduler.

When you add a new machine it will receive a default configuration that will listen on TCP port 9032 and will expect to be accessed using its Computer Name (NetBIOS name). If the computer must be accessed via a DNS name or IP Address you will need to modify your connection definitions when the wizard completes.

You need to specify the Computer Name of your machine here, as configured on that machine. This must be the NetBIOS name without the name qualified with the domain or workgroup name.

Duplicate Computer Names are not supported.

Computer Name	<input type="text" value="dev40"/>
Default Access Name	<p>This is the default IP address, DNS Name, or NetBios name to be used to connect to this machine if explicit outbound connections are not defined by other agents for connecting to this machine. IPv6 addresses must be enclosed in square brackets, like [::1]. This name is also used if the agent announces to other agents how they should connect to this machine. If omitted, the computer name is used.</p> <input type="text" value="IP address, DNS Name, or NetBios name"/>

Cancel < Back Next >

When the “Create Computer Configuration” wizard loads, the name of the computer SureSync is installed on is automatically filled in. For this example, the machine name is dev40. Click “Next” to continue.

**Create Computer Configuration**

**Computer Information**

**Credentials**

☒ Run a Communications Agent on this machine

Login Name

Specify the account that will be used to copy files. This is typically an administrator account because full permissions will be needed to read and write files and copy file permissions.

Password  Re-enter your password:

**Test Connections to Agent**

Use this button to attempt to connect from your current machine to this machine using each of the defined connections. Some connections may not be valid from your current location and may be expected to fail.

Using this test button will save your current configuration before attempting the test.

Cancel < Back Finish

The “Computer Information” panel of the wizard is where you define the user account and password that the Communications Agent should use to access the files on the machine.

To ease initial configuration, the “Run a Communications Agent on this machine” option will be checked. In addition, the account you are logged into the machine as will be prefilled in the “Login Name” field.

If you want the Communications Agent to run under a different user account, you can change it here. The account must be in domain\user or machinename\user format. You can also enter .\username to define a local account.

Enter the password for the defined account twice in the password fields.

When a Communications Agent configuration is saved, a default connection for TCP port 9031 is created automatically. In most environments, only the default connection is used.

To test the connection, click the “Test Connections to Agent” button.

Click “Finish” to complete Communications Agent configuration for the local agent. You will be taken to the SureSync Desktop.


## Importing a License

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A license file should be installed in the new database. This can be a trial license obtained from the Software Pursuits sales team or a purchased license.

If you are new to SureSync, you should request a trial license from <https://www.softwarepursuits.com/sureysnc>. A license file will be generated and sent to you via e-mail. You can also call our sales team at 1-800-367-4823.



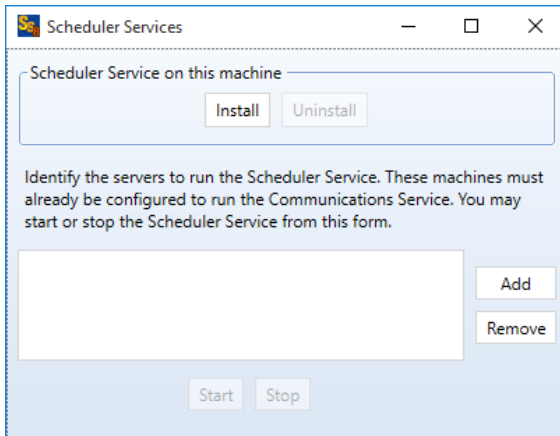
Once a license file has been provided to you, click the “Licenses” button (  ) in the ribbon bar of the SureSync Desktop and click the “Import License...” button to import the updated file.

## Installing the SureSync Scheduler

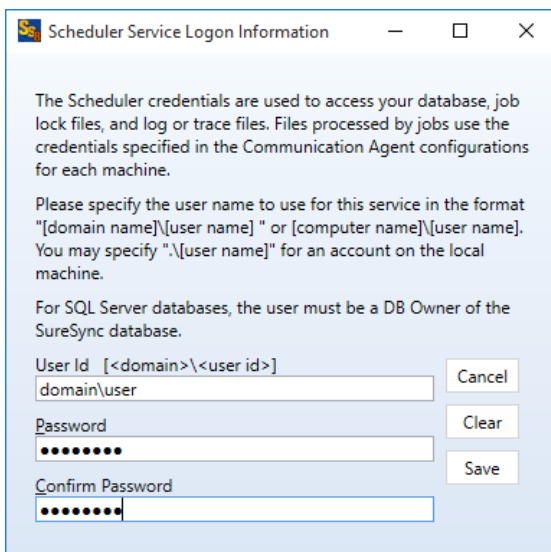
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The SureSync Scheduler is a Windows service that runs on the main SureSync machine. This service is responsible for launching Schedules at the correct times and for running Real-Time Monitors. You must have a Scheduler running for your Schedule to execute at the configured time.

To install the SureSync Scheduler service, click on the Home button in the upper left-hand corner of the SureSync Desktop and click on “Scheduler Services.”



To install the Scheduler, click the “Install” button, which will launch a window like the one below.



The user account the Scheduler service runs under must be a member of the local administrators group on the SureSync machine.

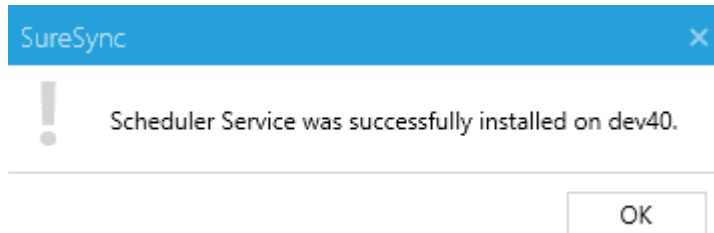
The account must also be a DBOwner on the SureSync database. Depending on the account you’re using and how your SQL Server is configured, you may need to do this manually if the account is not automatically assigned DBOwner on newly created databases.

To do so, launch SQL Server Management Studio. Connect to the instance where the new SureSync 9 database is located. Expand Security and then Logins. Locate the account that the Scheduler will be running under. Right click and select Properties. Click on User Mappings. Make sure there is a checkmark next to the SureSync 9 database and that db\_owner is checked for membership.

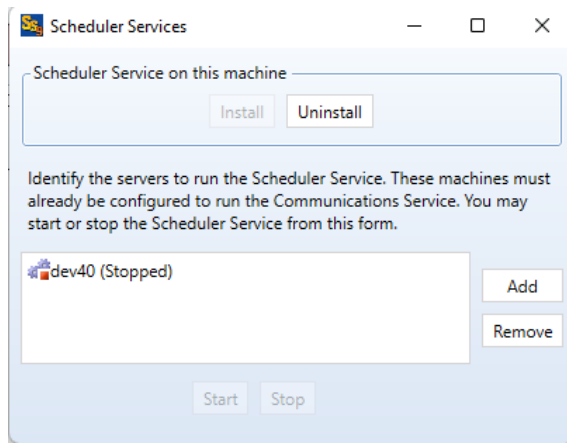
Enter the username formatted as *machinename\username* or *domainname\username*. This account must be an administrator on the machine. Click “Save” to install the service.



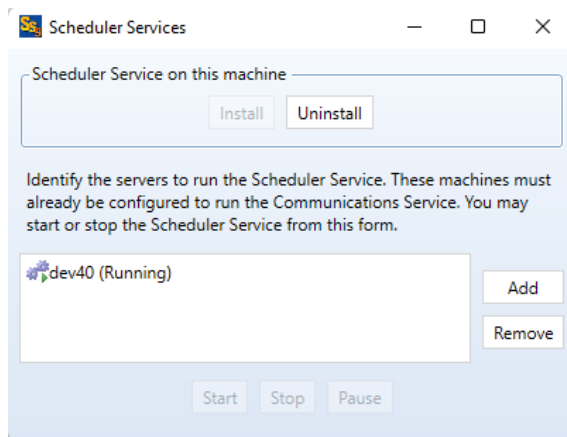
You will receive a confirmation dialog box that the Scheduler service was installed successfully as shown below.



The Scheduler will appear in the dialog with a status of (Stopped).



Once the service has been installed, click on the machine name and click "Start." The Scheduler will now be listed as Machine Name (Running).



## Configuring the Communications Agent Machines

The next step in configuring the environment is to define the remote Communications Agent machines.



To configure a Communications Agent, launch SureSync and click on the “Computer” (Computer) button in the ribbon bar.

Computer Name

You only need to add machines that will be running a Software Pursuits Communications Agent Service that will be accessed by SureSync jobs. Machines accessed via UNC paths do not need to be added. SureSync Endpoint client machines do not need to be added here. An agent is always required on the machine running the jobs and a Scheduler.

When you add a new machine it will receive a default configuration that will listen on TCP port 9032 and will expect to be accessed using it's Computer Name (NetBIOS name). If the computer must be accessed via a DNS name or IP Address you will need to modify your connection definitions when the wizard completes.

You need to specify the Computer Name of your machine here, as configured on that machine. This must be the NetBIOS name without the name qualified with the domain or workgroup name.

Duplicate Computer Names are not supported.

Computer Name	<input type="text" value="Please enter your new Computer Name"/>
Default Access Name	<input type="text" value="IP address, DNS Name, or NetBios name"/>

Cancel < Back Next >

The “Computer Name” panel of the Computer wizard is where you define the name of the machine running the Communications Agent that SureSync will be connecting to. This name must be the NetBIOS computer name of the computer.

The computer name entered here must be the NetBIOS computer name of the computer in question. Using an IP address or a random name will result in the connection failing.

Enter the computer name into the field. For example, spitest-win2k16.

**Create Computer Configuration**

**Computer Name**

You only need to add machines that will be running a Software Pursuits Communications Agent Service that will be accessed by SureSync jobs. Machines accessed via UNC paths do not need to be added. SureSync Endpoint client machines do not need to be added here. An agent is always required on the machine running the jobs and a Scheduler.

When you add a new machine it will receive a default configuration that will listen on TCP port 9032 and will expect to be accessed using its Computer Name (NetBIOS name). If the computer must be accessed via a DNS name or IP Address you will need to modify your connection definitions when the wizard completes.

You need to specify the Computer Name of your machine here, as configured on that machine. This must be the NetBIOS name without the name qualified with the domain or workgroup name.

Duplicate Computer Names are not supported.

Computer Name	spitest-win2k16
Default Access Name	<p>This is the default IP address, DNS Name, or NetBios name to be used to connect to this machine if explicit outbound connections are not defined by other agents for connecting to this machine. IPv6 addresses must be enclosed in square brackets, like [::1]. This name is also used if the agent announces to other agents how they should connect to this machine. If omitted, the computer name is used.</p> <p>IP address, DNS Name, or NetBios name</p>

Cancel < Back Next >

Click the “Next” button to continue.

The “Computer Information” panel of the wizard is where the credential used for accessing files on this Communications Agent machine is defined.

**Create Computer Configuration**

**Computer Information**

**Credentials**

☒ Run a Communications Agent on this machine

Login Name domain\user

Specify the account that will be used to copy files. This is typically an administrator account because full permissions will be needed to read and write files and copy file permissions.

Password ..... Re-enter your password: .....

Test Connections to Agent

Use this button to attempt to connect from your current machine to this machine using each of the defined connections. Some connections may not be valid from your current location and may be expected to fail.

Using this test button will save your current configuration before attempting the test.

Cancel < Back Finish

On this panel you will then want to:

1. Ensure that “Run a Communications Agent on this machine” is checked. It is by default.
2. Enter the account to be used in the “Login Name” field. This should be in domain\user or machinename\user format. .user can also be used to represent the machine name for local accounts.
3. Enter the password for the account in both password fields.

Click the “Test Connections to Agent” button to test the connection.

If the test does not complete successfully, there are some common causes to investigate:

1. Ensure the Software Pursuits SureSync 9 Communications Agent service is running on the machine.
2. Ensure the name you defined for the Computer name is the NetBIOS name of the computer.
3. Ensure that the clocks are accurate for the time zone the machine is in. .NET cryptography will reject requests when the clocks are greater than 5 minutes apart.
4. Ensure TCP port 9031 is forwarded to the correct machine in any firewall.


These steps should be done for each Communications Agent that will be used. In the example scenario, *SPITEST-WIN2K16* and *SPITEST-WIN2K19* would be defined.

## Creating the Job

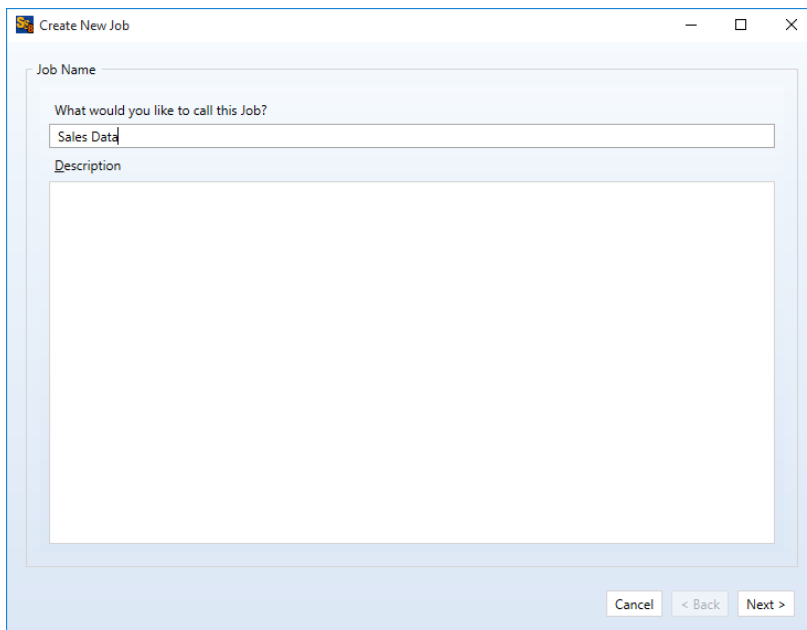
Jobs are the basic building blocks of SureSync. Each Job contains the root paths (source and destination paths) that apply to that Job and options for the Job. Each Job also contains one or more Rules that tell SureSync how to replicate / synchronize data. The Job and the Rule are created together in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

The wizards are designed to quickly and easily configure the basic options needed to get a Job up and running. SureSync is an extremely 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 (  ) in the ribbon bar to launch the Job Wizard. The Job Wizard will be used to configure your synchronization / replication.

### Name Your Job

A screenshot of the 'Create New Job' dialog box. The dialog has a title bar with a minus, maximize, and close button. Inside, there's a section titled 'Job Name' with a text box containing 'Sales Data'. Below it is a 'Description' label followed by a large empty text area. At the bottom right, there are three buttons: 'Cancel', '< Back', and 'Next >'.

Create New Job

Job Name

What would you like to call this Job?

Sales Data

Description

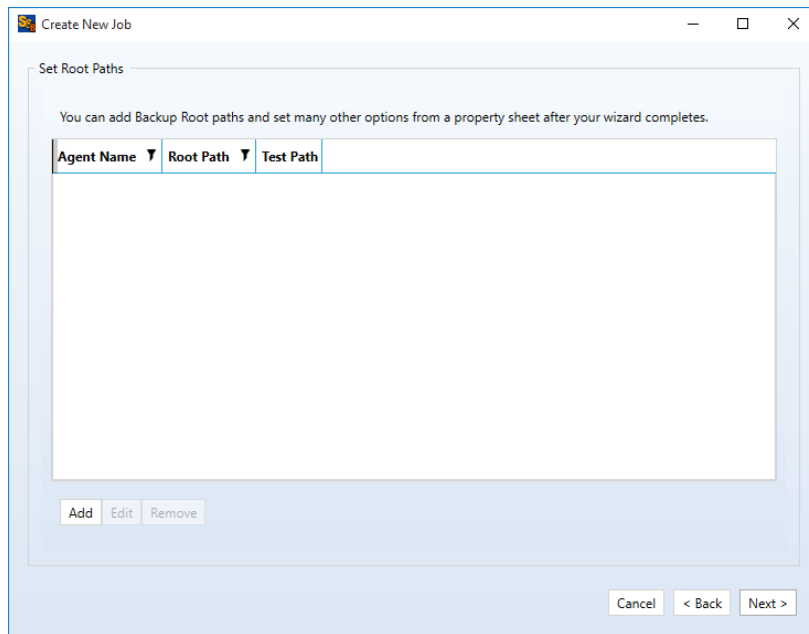
Cancel < Back Next >

The first panel in the wizard allows you to name your Job. Enter the name of the Job and an optional description and click “Next” to continue. The Job name used for this example will be “Sales Data”.

### **Specifying Root Paths**

The next panel is used to specify the paths that you want to synchronize. All the paths involved in the synchronization must be listed here.

If you do not define at least two root paths on this panel, the only Rule methods available later in the wizard will be “Delete” and “Skip.”

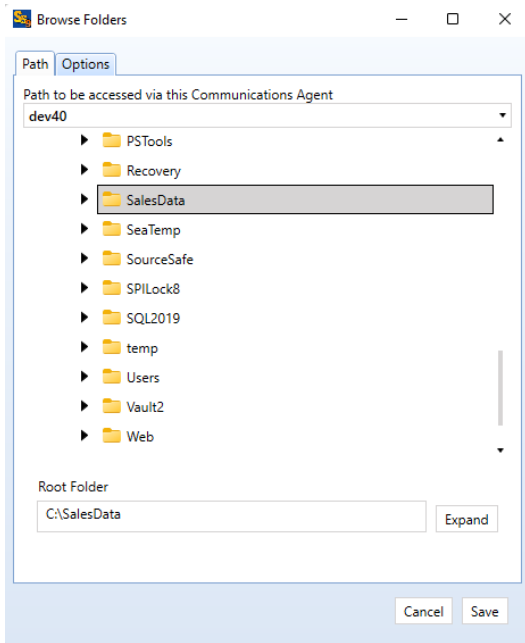


Root paths are added by clicking the “Add” button at the bottom of the panel to display the “Select a new root path” panel shown below.

For this example, our root paths are:

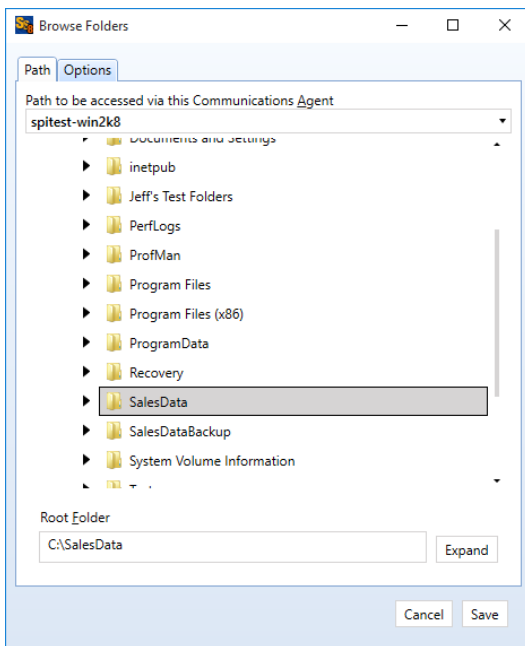
- C:\SalesData on DEV40
- C:\SalesData on SPITEST-WIN2K16
- C:\SalesData on SPITEST-WIN2K19

First, we will select the local path on DEV40 by selecting DEV40 from the “Path to be accessed via this Communications Agent” drop-down and then browsing for the C:\SalesData path.

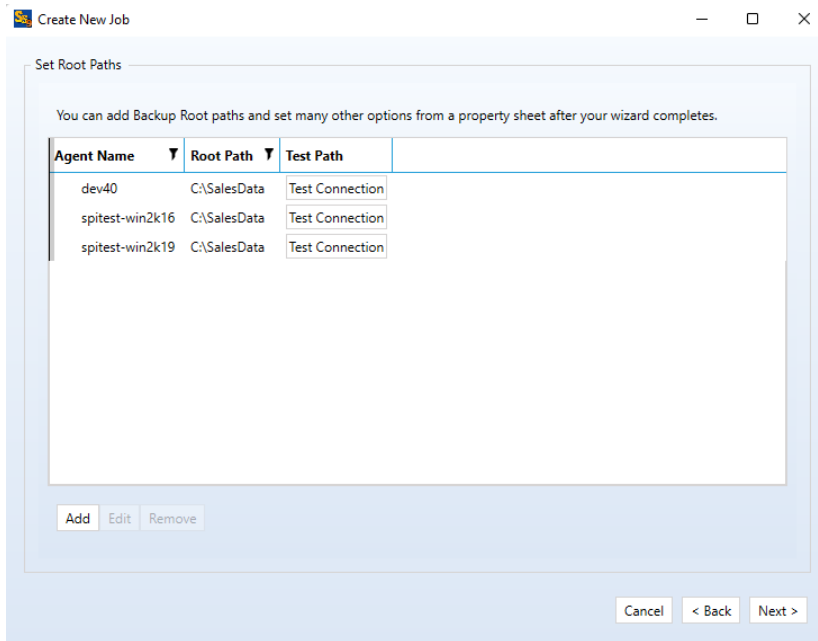


Once that path has been added, we must add the paths for the remote machines. Click the “Add” button again to add a new path. Then you will select the machine name from the “Path will be accessed via this Communications Agent” drop-down menu, browse to the path, and then click “OK.”

When selecting a remote Communications Agent from the drop-down, the browse panel will display the drives and folders from that remote machine as if you were sitting down in front of the computer.



Click “OK” to add the path. Continue clicking “New” and adding paths until all the paths involved in the synchronization are present.



Once all the paths have been entered, press the “Next” button to continue.

### **Determining the Best Rule**

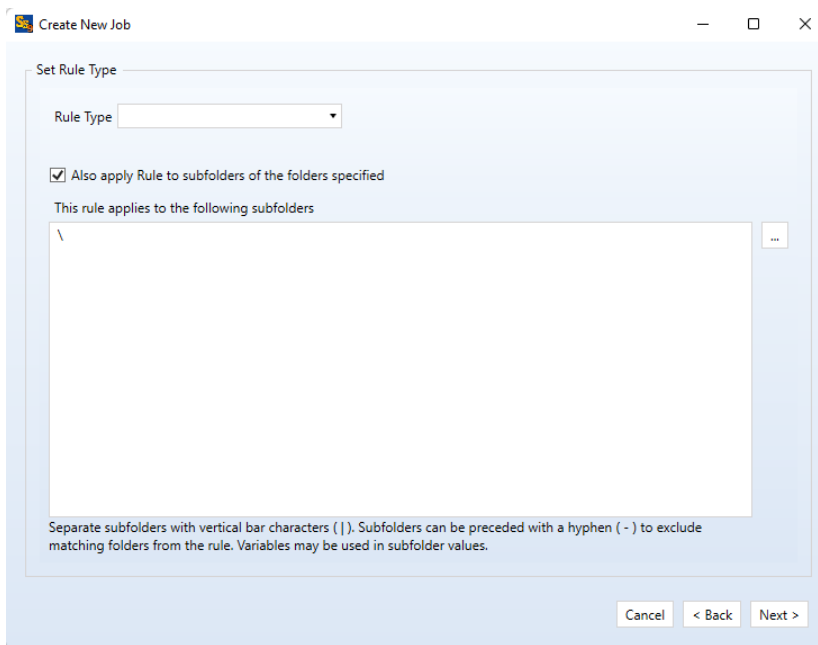
SureSync offers several different replication & synchronization methods, allowing a great deal of flexibility in how your data is handled. A chart detailing each of these Rules can be found in the help file under “Rule Methods Summary.”

### **Selecting Your Rule & Defining Folder Exclusions**

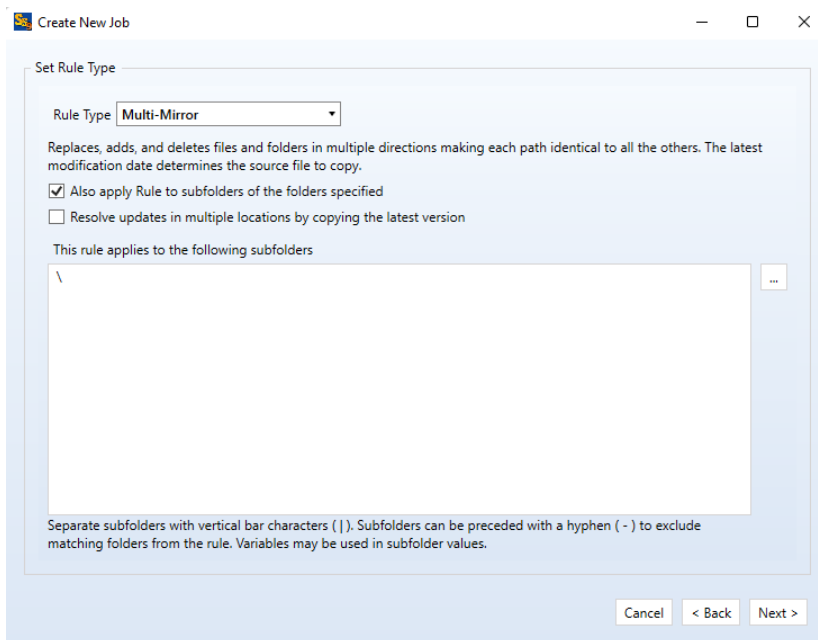
On this next panel we will specify the Rule to use for this job.

If the panel indicates that only the "Delete" and "Skip" Rules are available, you have selected only one root path. To correct the problem, you should click the “Back” button on the wizard and add the additional path(s) that will be processed by the Job.

The type of Rule we will be using in this example is "Multi-Mirror." The panel will load looking like the screenshot below.



To select the Rule Type, pull down the “Rule Type” drop-down and select “Multi-Mirror.”



The “This rule applies to the following subfolders” section of the panel allows you to include or exclude specific subfolders. The default “\” means to include all subfolders. You can enter subfolders into the text field or select them using the checkboxes in the browse dialog on the lower portion of the wizard panel. Folders are excluded by placing a minus character (-) in front of the folder name. Multiple folder entries are separated by the vertical bar character (|).

### Examples

To synchronize only two subfolders named “FolderA” and “FolderB,” you would enter the following:



\FolderA\ | \FolderB\

To synchronize all subdirectories except for subfolders “FolderA” and “FolderB,” you would enter the following:

\ | -\FolderA\ | -\FolderB\

For our example scenario, the default “\” option will be used to process all subfolders.

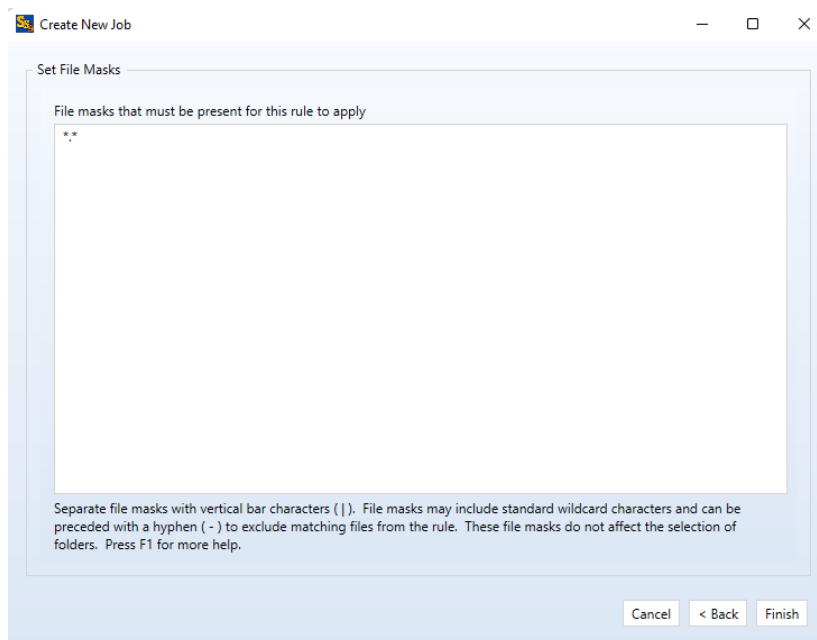
To learn more about how to include and exclude subfolders, press the “F1” key on this panel.

Click the “Next” button to continue.

### **Filtering Based on File Masks**

The next panel displayed will let you indicate the files to be included or excluded from the synchronization. Each entry in this panel should be separated by a vertical bar (|) character. To exclude a file name or file type, place a minus sign (-) in front of the mask.

The default file mask is \*.\* which includes all files. Some common exclusions you could consider adding are: \*.tmp | ~\*.doc | ~\$.doc? | ~\$.xls?. This excludes tmp files and some Microsoft Office temporary files.



### ***Examples***

To synchronize only \*.doc files and a file named “Test.txt,” you would enter the following:

\*.doc | Test.txt

To exclude \*.tmp files, \*.doc files, and a file named “Test.txt,” you would enter the following:

\*.\* | -\*.tmp | -\*.doc | -Test.txt

To learn more about how to include and exclude files based on file masks, press the “F1” key on this panel.

Clicking the “Finish” button will create your Job. The Job Wizard only displays a subset of essential options for a Job. There are many other options that can be configured by modifying the properties of the Job using the SureSync Desktop. Pressing the “F1” key on any tab in the application will display context sensitive help detailing the options on that tab.

### **Previewing Your Job**

SureSync provides two methods to preview the actions that will be performed by a Job. The first option is the Preview that provides a graphical user interface display of all actions that would be performed without actually doing them. To launch a Preview, click on the Job in the SureSync Desktop and click on the Preview button in the Ribbon Bar. Further details about Preview are available in the SureSync help file.

The second option is called a Trial Run. This method produces a tab delimited file containing the actions that would be performed. This file can easily be opened in Microsoft Excel to be viewed. To run a Trial Run, right click on the Job and select “Trial Run.” Further details about Trial Run are available in the SureSync help file.

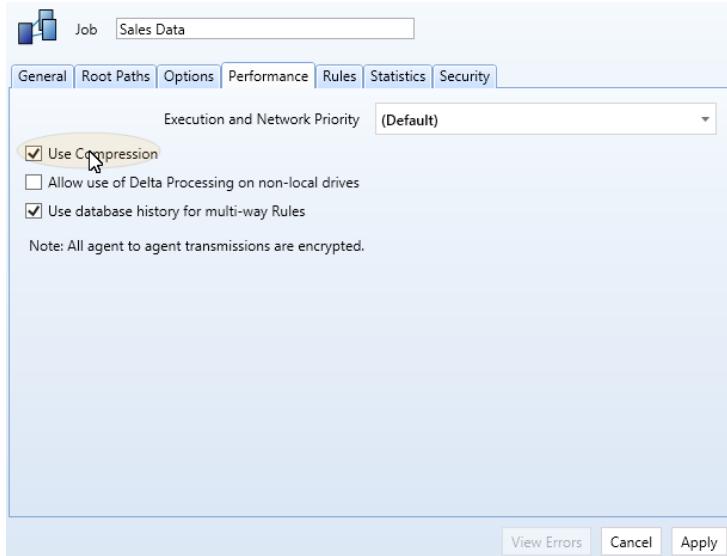
## **Communications Agent Compression & Encryption**

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The Communications Agent Add-On provides the ability to compress data during transmission. This feature is useful when processing data over slow connections or public networks such as the Internet.

Encryption is always enabled when using the Communications Agent. The default encryption method is a basic United States Federal Information Processing Standard (FIPS) certified Transport Layer Security (TLS) with Certificate encryption. A series of other encryption methods are available. Additional details can be found in the SureSync help file in the “Communications Agent Configuration – Connections” topic.

To enable compression, you must click on the “Performance” tab of the Job in question and check the “Use Compression” option.



## Creating a Real-Time Monitor

A Real-Time Monitor is used in place of a Schedule to constantly monitor changes in files. When a change is detected, the associated Job/Rule is applied, and the synchronization is immediately performed.

Real-Time Monitors require the optional Communications Agent Add-on to be installed on each machine involved in the real-time synchronization. A Communications Agent license is also required for the local machine that will be running the job (if that machine is involved in the synchronization).

In this example, we will create a Real-Time Monitor to process changes to our Job as they occur.

A Job can only be running in one instance at a given time. If you are planning to run a Job with a Real-Time Monitor then you should not attempt to run a Schedule of that same Job at the same time. You will get errors about the Job already being busy. If a Schedule exists to run a Job you're going to run with a Real-Time Monitor, it should be placed on hold or deleted.



To begin configuring your Real-Time Monitor click on the Job button ( ) in the ribbon bar. This will launch the Real-Time Monitor wizard that is used to configure your Job to be run in real-time.

The wizards are designed to quickly and easily configure the basic options needed to get a Real-Time Monitor up and running. SureSync is an extremely flexible product with many advanced options. Additional options can be specified on the properties panels for the Real-Time Monitor after it has been created.

### **Name Your Monitor**

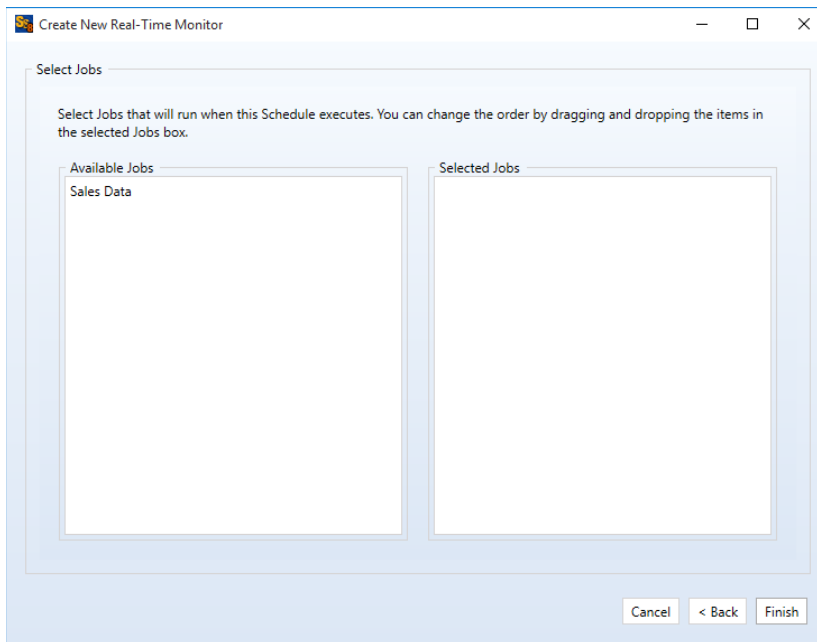
A screenshot of the "Create New Real-Time Monitor" dialog box. The dialog has a title bar with a minus, maximize, and close button. Inside, there's a section titled "Real-Time Monitor Name" with a prompt "What would you like to call this Real-Time Monitor?". Below this is a text input field containing "Sales Data". Underneath is a "Description" label followed by a large empty text area. At the bottom left, there's a checked checkbox labeled "Stop Real-Time Monitor and place it on hold". At the bottom right, there are three buttons: "Cancel", "< Back", and "Next >".

The first panel allows you to name your Real-Time Monitor. Enter the name of the Real-Time Monitor and an optional description. Then click "Next" to continue.

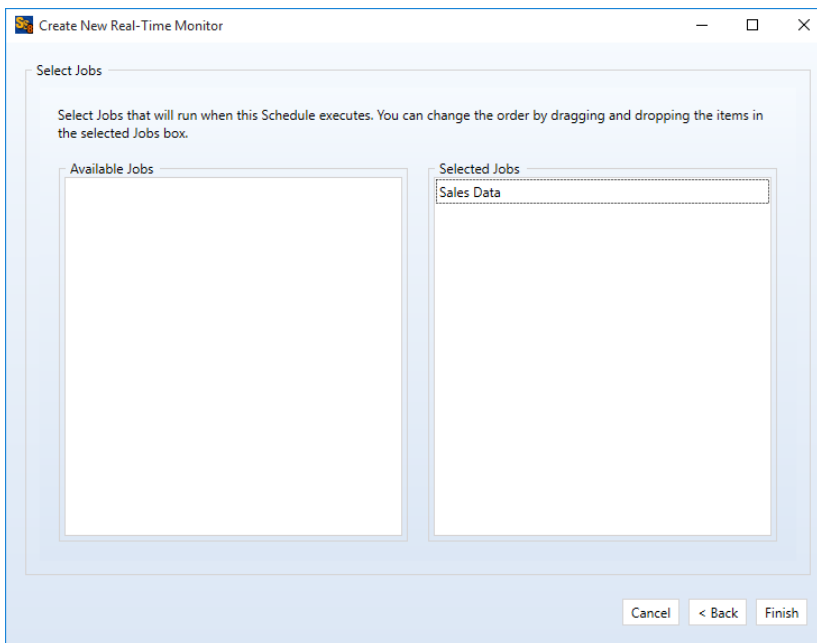
### **Selecting What Job(s) to Run**

The next panel is where you specify which Job you would like this Real-Time Monitor to run. Jobs are selected by performing a drag and drop operation from the "Available Jobs" column to the "Selected Jobs" column.

Multiple Jobs can be run under one Real-Time Monitor. To do so, add all the Jobs you want this Real-Time Monitor to run under the "Selected Jobs" column.



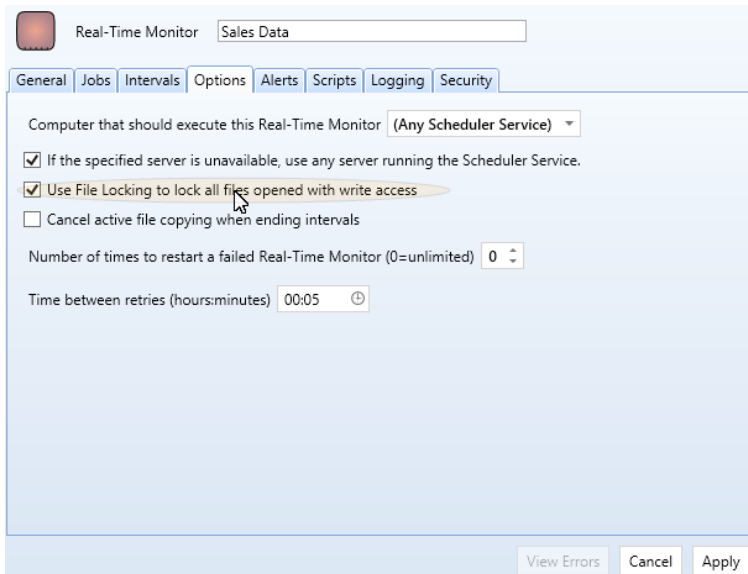
For our example, drag and drop the “Sales Data” Job into the “Selected Jobs” column. The panel should now look like this:



Click the “Finish” button to create the Real-Time Monitor.

### **Enable File Locking**

File Locking must be enabled before starting the Real-Time Monitor. To enable this functionality, click on the Real-Time Monitor in the SureSync Desktop. Click on the Options tab and check the box for “Use File Locking to lock all files opened with write access.”



### **Modifying and Running Your Real-Time Monitor**

When the wizard is complete, you will be returned to the SureSync Desktop and the Real-Time Monitor you created will be displayed.

You can make changes to the options for your Real-Time Monitor in the main SureSync window by first clicking on the Real-Time monitor you wish to modify. You can then look through the tabs on the right side for options to change. Pressing “F1” while on any tab will bring up context sensitive help describing the options in detail.

Now that the Real-Time Monitor is created, it may be started by selecting the Monitor and clicking the “Start” button in the Ribbon Bar. The Real-Time Monitor will switch to an “Active” status.

## **Configuring E-mail Alerts**

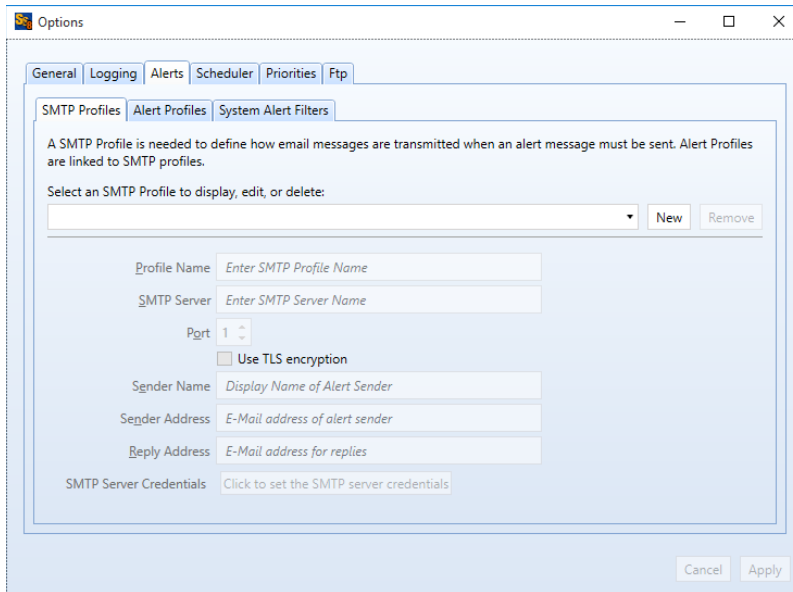
E-mail alerts are part of the Alert system within SureSync and can be a useful way of notifying the SureSync administrator of a problem that should be investigated.

### **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 with the necessary details about your SMTP e-mail server so the program can send e-mail messages to you.



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.
- **Sender Address:** The e-mail address that will appear on messages sent by SureSync.
- **Reply Address:** The reply address that will appear on messages sent by SureSync.

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 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.

Options

General | Logging | Alerts | Scheduler | Priorities | Ftp

SMTP Profiles | Alert Profiles | System Alert Filters

A SMTP Profile is needed to define how email messages are transmitted when an alert message must be sent. Alert Profiles are linked to SMTP profiles.

Select an SMTP Profile to display, edit, or delete:

Profile Name: SMTP Server

SMTP Server: smtp.domain.com

Port: 25

☐ Use TLS encryption

Sender Name: SureSync Admin

Sender Address: suresync@domain.com

Reply Address: suresync@domain.com

SMTP Server Credentials: [Click to set the SMTP server credentials](#)

Cancel Apply

### **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

General | Logging | Alerts | Scheduler | Priorities | Ftp

SMTP Profiles | Alert Profiles | System Alert Filters

An Alert Profile defines a set of email recipients, options for sending alerts to the person or group, and a link to the SMTP Profile used for sending email.

Select an Alert Profile to display, edit, or delete:

Profile Name: Enter Alert Profile Name

Recipient Address(es): Enter recipient's email address

SMTP Profile: Select an SMTP Profile

[Send Test Message](#)

Cancel Apply

The following fields need to be configured:

- **Profile Name:** The name of the profile.
- **Recipient Address(es):** The e-mail address(es) that SureSync 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 administrators.



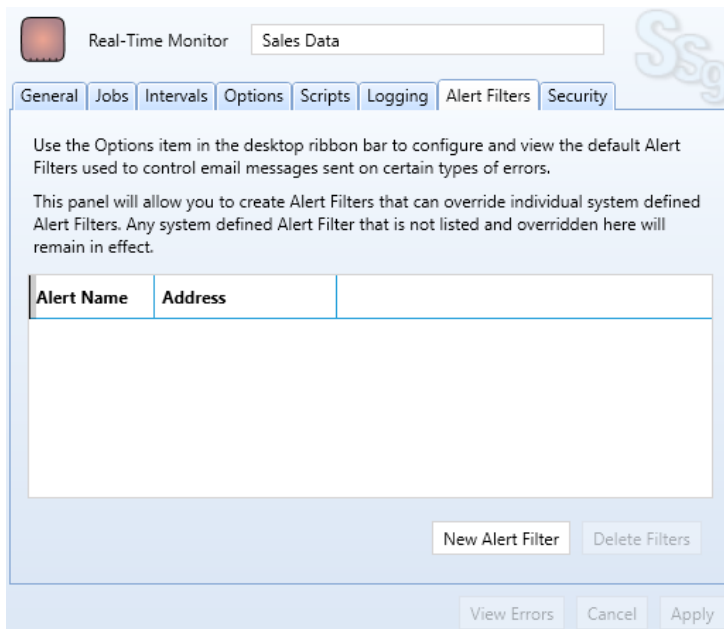
### **Configuring the Real-Time Monitor to Send Alerts**

The final step for receiving e-mail alerts from the Real-Time Monitor is to define an Alert Filter on the Real-Time Monitor.

A global Alert Filter can be defined on the Alerts tab of Options. These global Alert Filter settings are inherited by all Jobs, Schedules and Real-Time Monitors defined in the database. Global Alert Filters can be overwritten for a specific Job, Schedule or Real-Time Monitor as appropriate.

You can also define an Alert Filter on a specific Job, Schedule or Real-Time Monitor. This is what will be done in this guide.

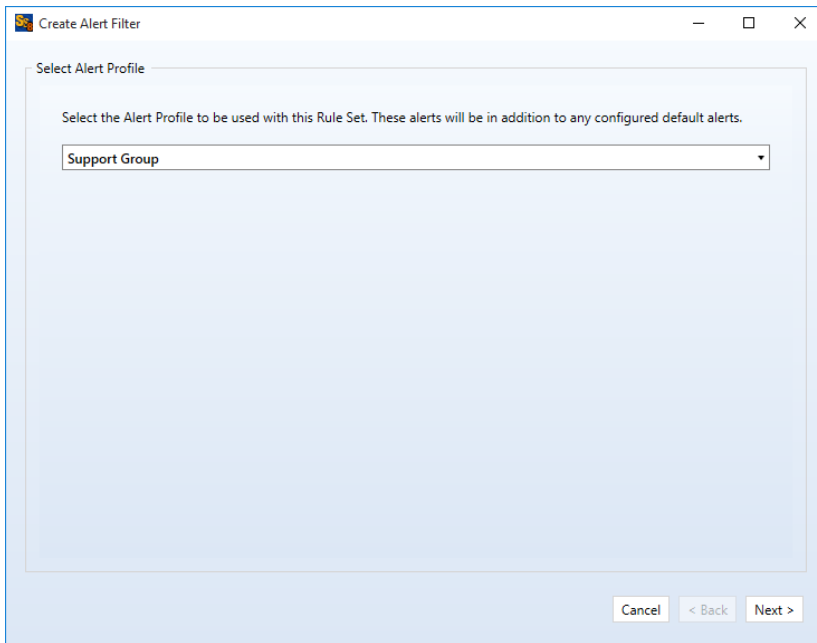
Click on the “Sales Data” Real-Time Monitor and click on the “Alert Filters” tab.



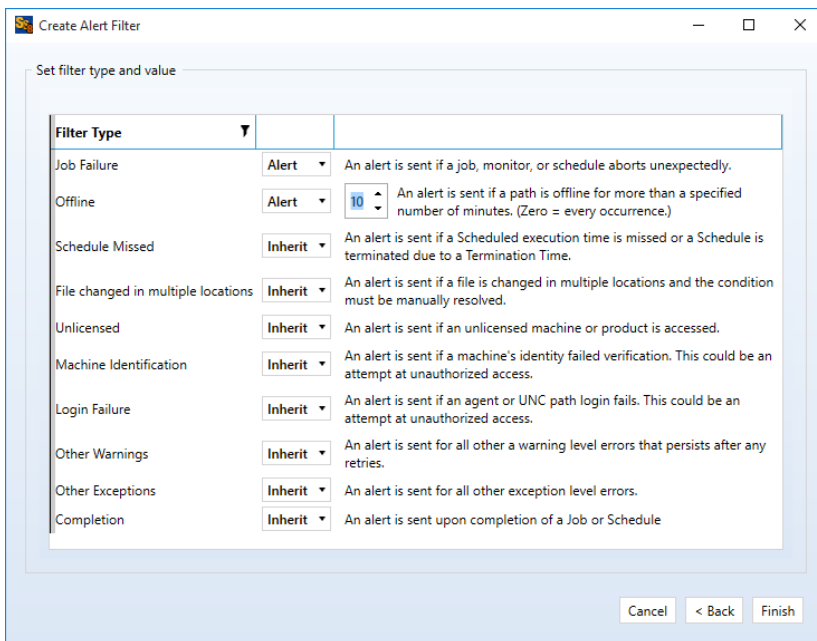
The screenshot shows a software window titled "Real-Time Monitor" with a dropdown menu set to "Sales Data". Below the title bar is a tabbed interface with tabs for "General", "Jobs", "Intervals", "Options", "Scripts", "Logging", "Alert Filters" (which is selected), and "Security". The "Alert Filters" tab contains instructional text: "Use the Options item in the desktop ribbon bar to configure and view the default Alert Filters used to control email messages sent on certain types of errors." and "This panel will allow you to create Alert Filters that can override individual system defined Alert Filters. Any system defined Alert Filter that is not listed and overridden here will remain in effect." Below the text is a table with two columns: "Alert Name" and "Address". The table is currently empty. At the bottom of the table area are two buttons: "New Alert Filter" and "Delete Filters". At the very bottom of the window are three buttons: "View Errors", "Cancel", and "Apply".

Alert Name	Address
------------	---------

Click on the “New Alert Filter” button.



From the drop-down menu on the “Select Alert Profile” panel select the Alert Profile you want to configure. Click “Next” to continue.



On the next panel, you can define the types of alerts you would like to receive via e-mail. For a full description of all available options, press F1 to launch the context sensitive help.

Click “Finish” to create the Alert Filter. It will be displayed in the Schedule properties.

Real-Time Monitor Sales Data

General Jobs Intervals Options Scripts Logging **Alert Filters** Security

Use the Options item in the desktop ribbon bar to configure and view the default Alert Filters used to control email messages sent on certain types of errors.

This panel will allow you to create Alert Filters that can override individual system defined Alert Filters. Any system defined Alert Filter that is not listed and overridden here will remain in effect.

Alert Name	Address
Support Group	support@domain.com

New Alert Filter Delete Filters

View Errors Cancel Apply

## Monitoring the Synchronization

Monitoring your synchronization job is important, and SureSync makes this process easy using two different status panels.

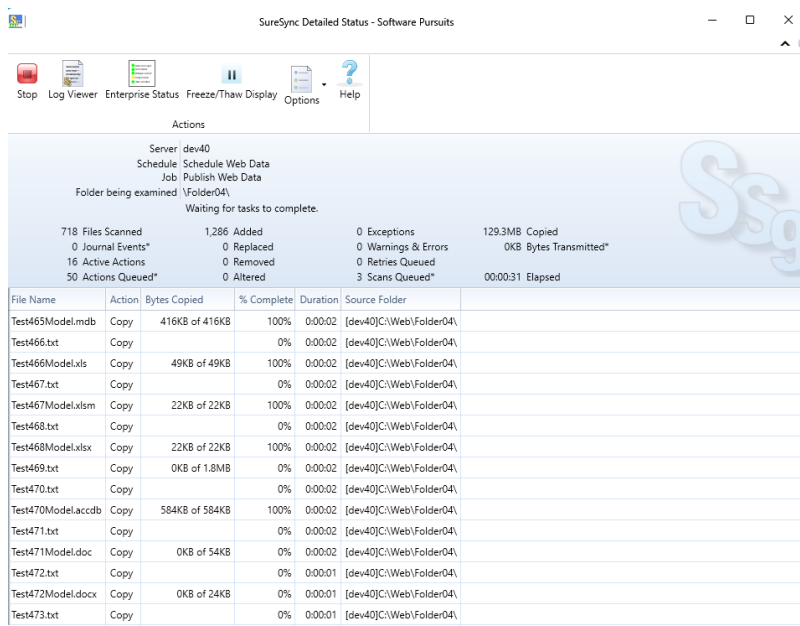
### **Detailed Status**

The detailed status panel will show you file level activity for a current job as well as common counters such as files added, and files deleted. If you want to take an in-depth look at a particular job, you will want to use Detailed Status.

To launch Detailed Status, right click on the job and select “Job Status.”



You can also select the job and click on the “Status” button ( ) in the Ribbon Bar.



SureSync Detailed Status - Software Pursuits

Stop Log Viewer Enterprise Status Freeze/Thaw Display Options Help

Actions

Server: dev40  
Schedule: Schedule Web Data  
Job: Publish Web Data  
Folder being examined: \Folder04\

Waiting for tasks to complete.

718 Files Scanned	1,286 Added	0 Exceptions	129.3MB Copied
0 Journal Events*	0 Replaced	0 Warnings & Errors	0KB Bytes Transmitted*
16 Active Actions	0 Removed	0 Retries Queued	
50 Actions Queued*	0 Altered	3 Scans Queued*	00:00:31 Elapsed

File Name	Action	Bytes Copied	% Complete	Duration	Source Folder
Test465Model.mdb	Copy	416KB of 416KB	100%	0:00:02	[dev40]C:\Web\Folder04\
Test466.txt	Copy		0%	0:00:02	[dev40]C:\Web\Folder04\
Test466Model.xls	Copy	49KB of 49KB	100%	0:00:02	[dev40]C:\Web\Folder04\
Test467.txt	Copy		0%	0:00:02	[dev40]C:\Web\Folder04\
Test467Model.xls	Copy	22KB of 22KB	100%	0:00:02	[dev40]C:\Web\Folder04\
Test468.txt	Copy		0%	0:00:02	[dev40]C:\Web\Folder04\
Test468Model.xls	Copy	22KB of 22KB	100%	0:00:02	[dev40]C:\Web\Folder04\
Test469.txt	Copy	0KB of 1.8MB	0%	0:00:02	[dev40]C:\Web\Folder04\
Test470.txt	Copy		0%	0:00:02	[dev40]C:\Web\Folder04\
Test470Model.accd	Copy	584KB of 584KB	100%	0:00:02	[dev40]C:\Web\Folder04\
Test471.txt	Copy		0%	0:00:02	[dev40]C:\Web\Folder04\
Test471Model.doc	Copy	0KB of 54KB	0%	0:00:02	[dev40]C:\Web\Folder04\
Test472.txt	Copy		0%	0:00:01	[dev40]C:\Web\Folder04\
Test472Model.docx	Copy	0KB of 24KB	0%	0:00:01	[dev40]C:\Web\Folder04\
Test473.txt	Copy		0%	0:00:01	[dev40]C:\Web\Folder04\

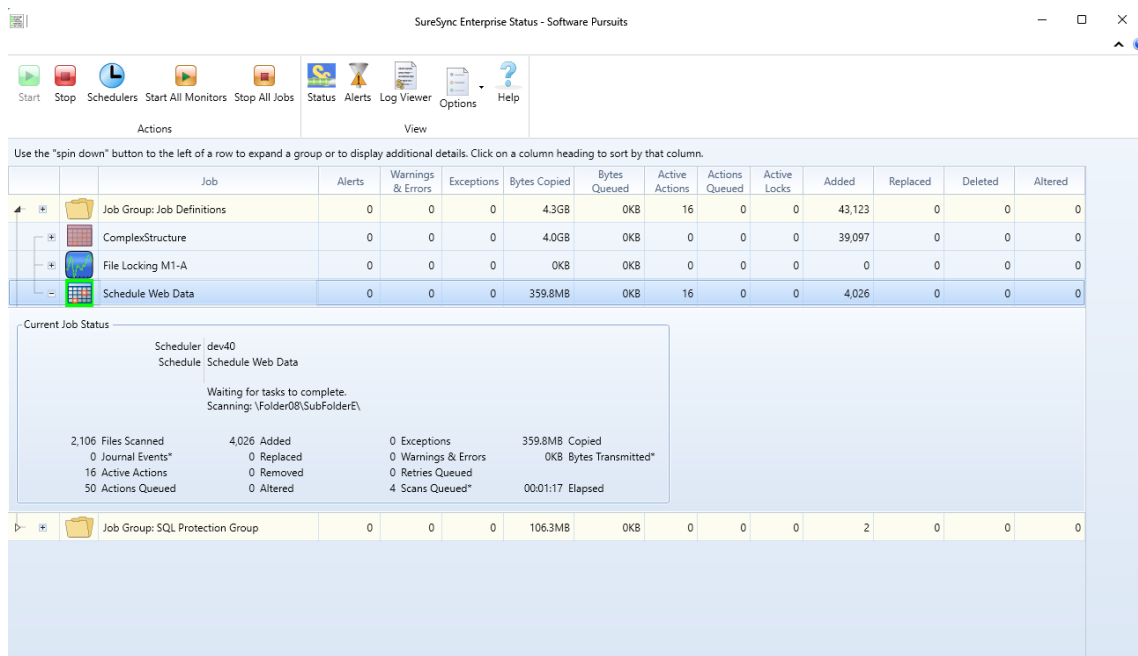
## Enterprise Status

The Enterprise Status panel can be used to view the status of jobs from SureSync installations anywhere on your network. The Enterprise Status panel provides an easy way to stay current on the status of your jobs, no matter where they are running.

Enterprise Status can be launched by going to the Start menu, selecting SureSync 9 and then “SureSync 9 Enterprise Status.”



You can also click on the “Ent Status” button (Ent Status) in the Ribbon Bar.



SureSync Enterprise Status - Software Pursuits

Start Stop Schedulers Start All Monitors Stop All Jobs Status Alerts Log Viewer Options Help

Actions View

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.

Job	Alerts	Warnings & Errors	Exceptions	Bytes Copied	Bytes Queued	Active Actions	Actions Queued	Active Locks	Added	Replaced	Deleted	Altered
Job Group: Job Definitions	0	0	0	4.3GB	0KB	16	0	0	43,123	0	0	0
ComplexStructure	0	0	0	4.0GB	0KB	0	0	0	39,097	0	0	0
File Locking M1-A	0	0	0	0KB	0KB	0	0	0	0	0	0	0
Schedule Web Data	0	0	0	359.8MB	0KB	16	0	0	4,026	0	0	0

Current Job Status

Scheduler: dev40  
Schedule: Schedule Web Data

Waiting for tasks to complete.  
Scanning: \Folder08\SubFolderE\

2,106 Files Scanned	4,026 Added	0 Exceptions	359.8MB Copied
0 Journal Events*	0 Replaced	0 Warnings & Errors	0KB Bytes Transmitted*
16 Active Actions	0 Removed	0 Retries Queued	
50 Actions Queued	0 Altered	4 Scans Queued*	00:01:17 Elapsed

Job Group: SQL Protection Group	0	0	0	106.3MB	0KB	0	0	0	2	0	0	0
---------------------------------	---	---	---	---------	-----	---	---	---	---	---	---	---