



**Standard  
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. The base SureSync product can perform one-way and multi-way synchronizations via UNC path or drive mapping. These synchronizations can be run manually or on a scheduled basis. By reviewing this guide, you will become familiar with how to use SureSync 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.

### **Software Pursuits, Inc.**

140 Chestnut Ln  
San Mateo, CA 94403

Phone: +1-650-372-0900

Fax: +1-650-372-2912

Sales e-mail: [sales@softwarepursuits.com](mailto:sales@softwarepursuits.com)

Support e-mail: [support@softwarepursuits.com](mailto:support@softwarepursuits.com)

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

## SureSync Add-On Licenses

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Several Add-On licenses are available for SureSync that enhance the capabilities and performance of the software. The available Add-On licenses include:

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

Ensure high availability and improved replication performance with SureSync's Communications Agent Add-On. The Communications Agent provides technology to perform real-time synchronization/replication and more. Below is a list of features that are included when you license the Communications Agent Add-On.

- **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.

Please consult the [SureSync Pro Bundle Evaluator's Guide](#) for further details.

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

The File Locking Add-On requires the Communications Agent to be licensed and gives you an additional benefit in collaborative 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.

Please consult the [SureSync Collaboration Bundle Evaluator's Guide](#) for further details.

### **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.

## **Our Scenario**

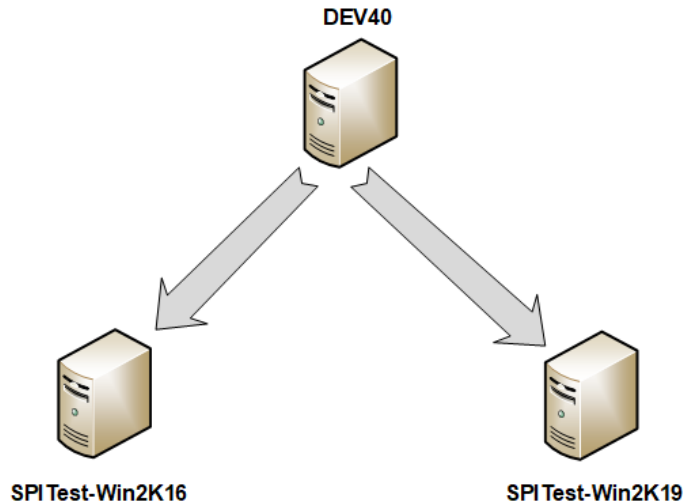
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This guide will walk you through the configuration of SureSync to accomplish a one-way distribution of files from a source server named *DEV40* to two destination servers named *SPITest-Win2K16* and *SPITest-Win2K19*.

In this scenario, SureSync will be used to mirror data from a staging server to two destination production machines. This is a common scenario for tasks such as web site publishing, updating templates or distributing application updates.

In this example, a folder C:\Web will be mirrored from *DEV40* to the [\\SPITestWin2K16\Web](#) and [\\SPITestWin2K19\Web](#) shares on a scheduled basis.

This guide will show you how to configure a one-way synchronization job using a Schedule on a clock basis. In this example, the Schedule will run once an hour. SureSync can also be run in real-time. When run in this mode, changes are synchronized as they occur. This functionality requires the Communications Agent. Please consult the [SureSync Pro Bundle Evaluator's Guide](#) for further details about configuring a Real-Time scenario.

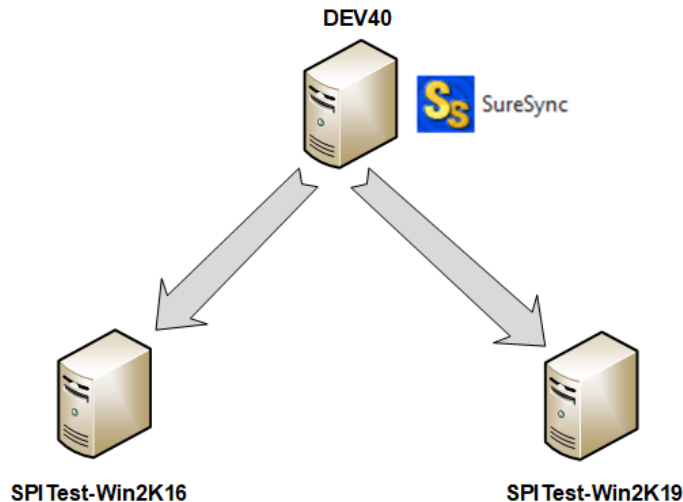


## Installation

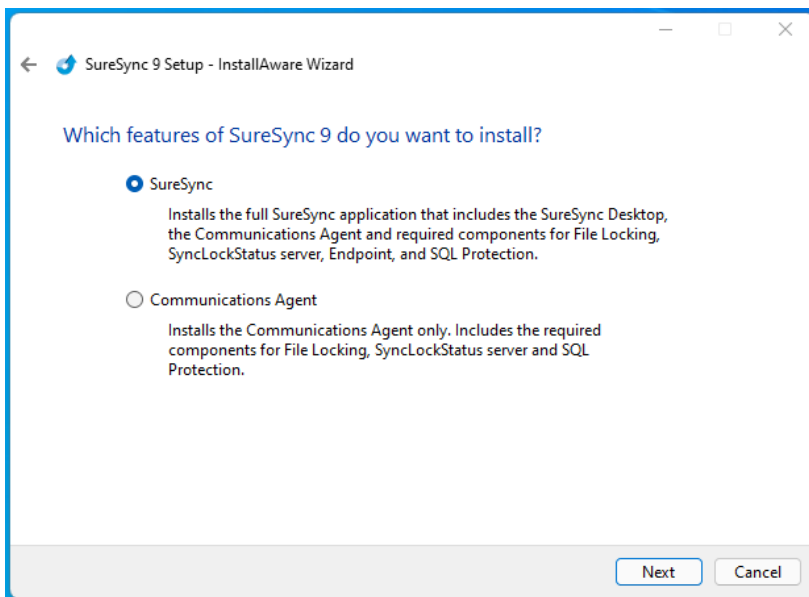
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To begin your SureSync trial, you must install the correct SureSync components on the right machines. SureSync is installed using a standard Windows Installer. SureSync and all Add-On products are installed using the same installer.

For this scenario, the full SureSync application will be installed on one machine (*DEV40*). No software needs to be installed on the remote machines when performing a UNC based synchronization/replication.



On the *DEV40* machine, we will run SureSync9Setup.exe and select SureSync as the installation type in the installer. This will install the complete SureSync application and designate *DEV40* as the machine where we configure and run our synchronization.



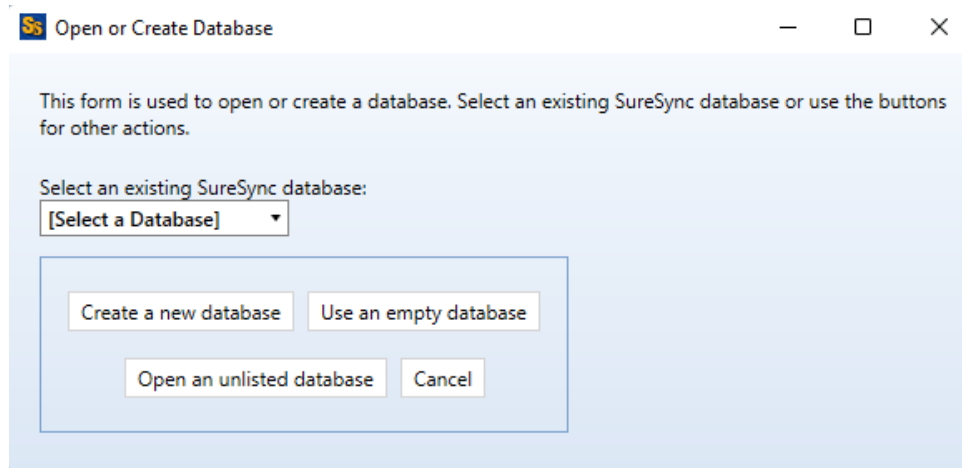
## Launch SureSync for the First Time

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.

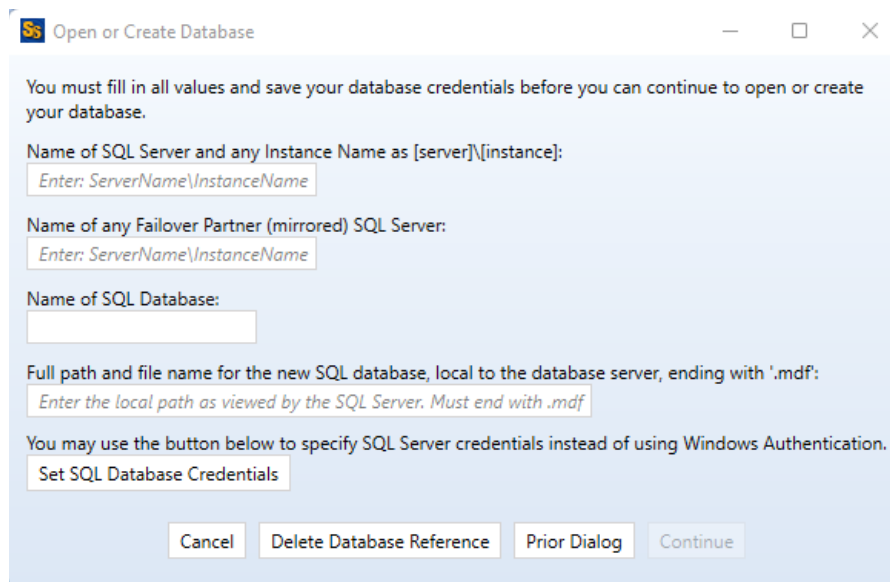
On the first launch of the application, SureSync will present you with a series of questions to aid in completing the initial configuration.

### 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:

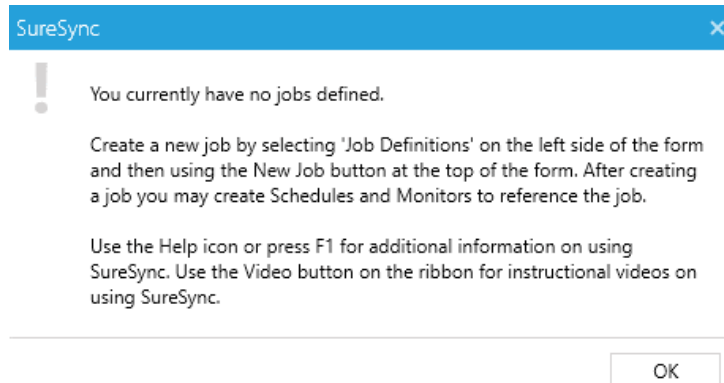
- **Name of the SQL Server and any Instance Name:** Enter the name of the SQL server and an instance name if used. For example, dev40\sqlexpress.
- **Name of any Failover Partner (mirrored) SQL Server:** This is an optional field that allows you to use a SQL Failover Partner. This functionality has been 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.

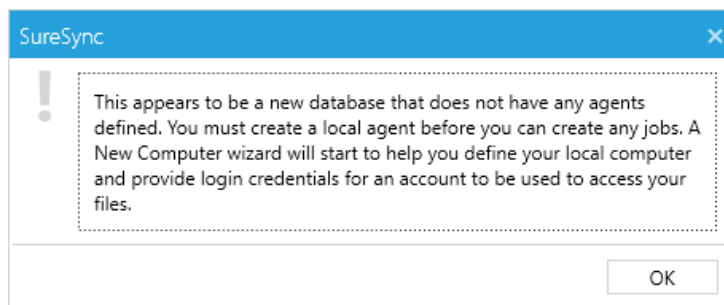
Next, the following dialog will be displayed:



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/suresync>. 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.



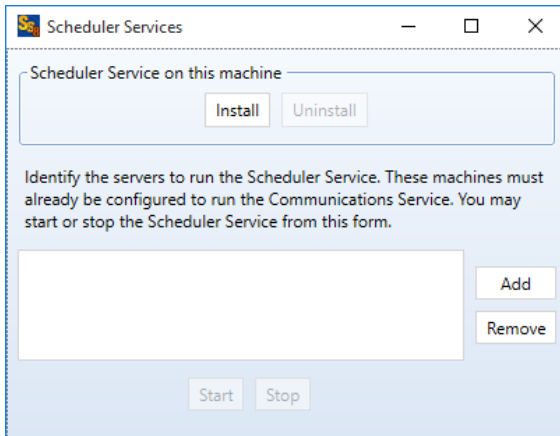
Once a license file has been provided to you, click the “Licenses” button (  ) in the ribbon bar of the SureSync Desktop and click the “Import License...” button to import the updated file.

## Installing the SureSync Scheduler

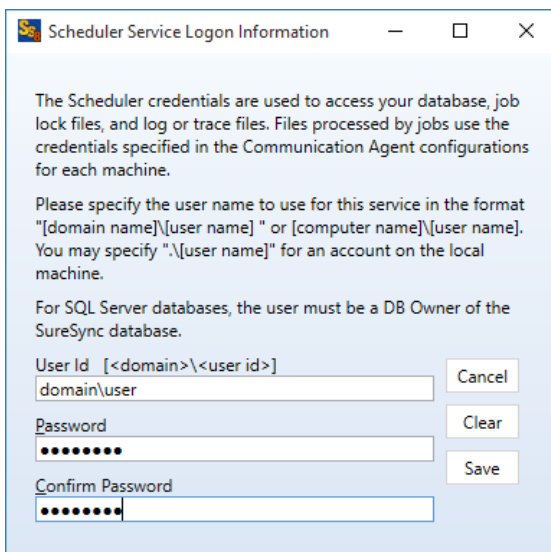
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The SureSync Scheduler is a Windows service that runs on the main SureSync machine. This service is responsible for launching Schedules at the correct times and for running Real-Time Monitors. You must have a Scheduler running for your Schedule to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



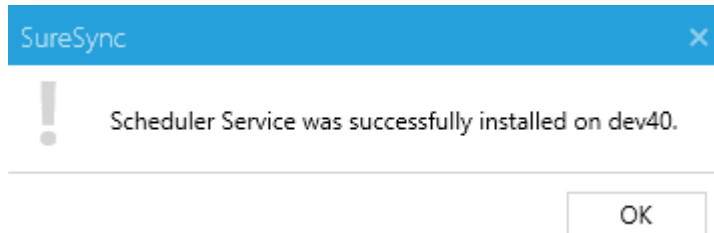
The user account the Scheduler service runs under must be a member of the local administrators group on the SureSync machine.

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.

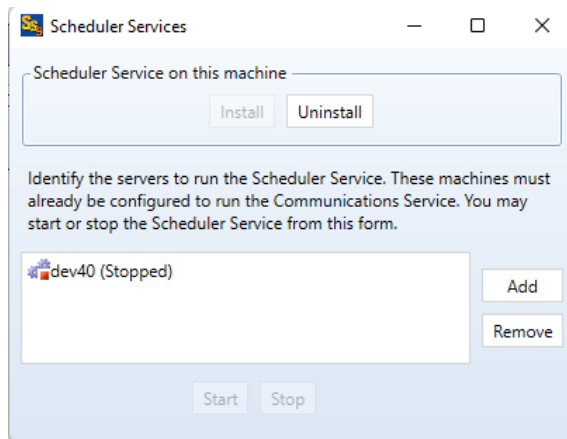
To do so, launch SQL Server Management Studio. Connect to the instance where the new SureSync 9 database is located. Expand Security and then Logins. Locate the account that the Scheduler will be running under. Right click and select Properties. Click on User Mappings. Make sure there is a checkmark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

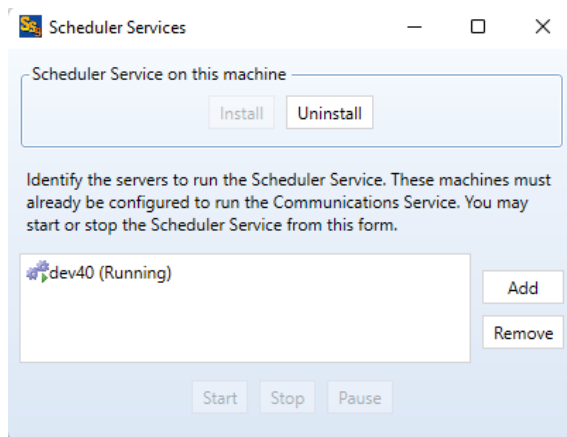
You will receive a confirmation dialog box that the Scheduler service was installed successfully as shown below.



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).




## Creating the Job

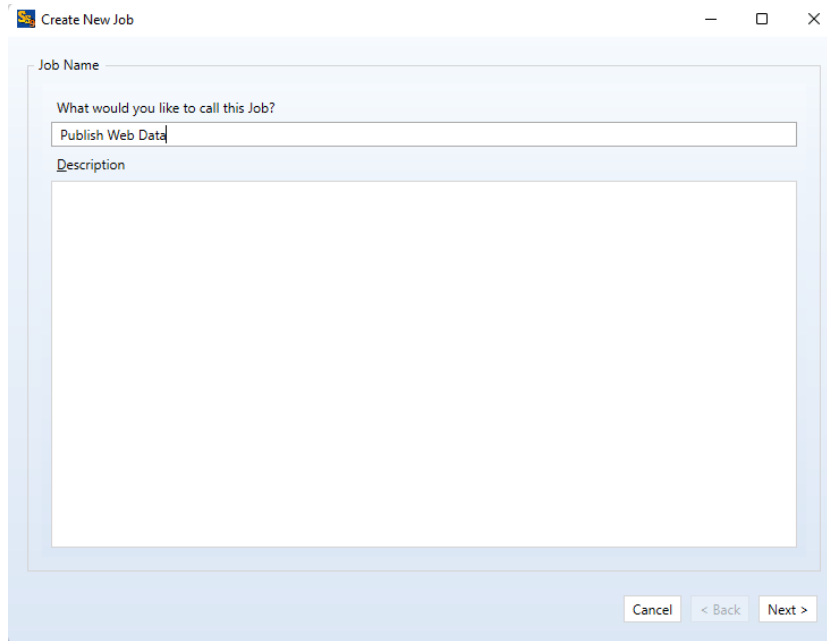
Jobs are the basic building blocks of SureSync. Each Job contains the root paths (source and destination paths) that apply to that Job and options for the Job. Each Job also contains one or more Rules that tell SureSync how to replicate & synchronize data. The Job and the Rule are created together in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

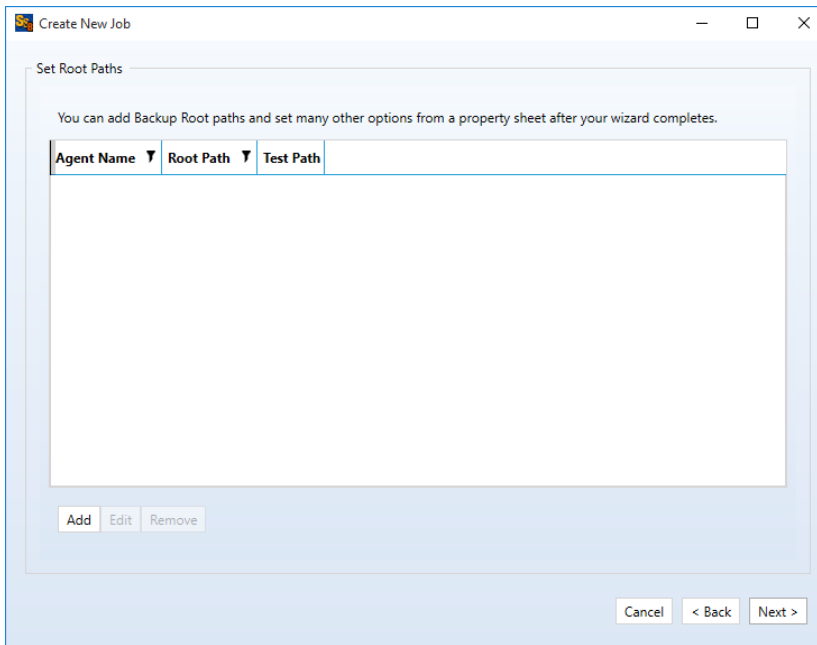
A screenshot of the "Create New Job" dialog box. The dialog has a title bar with a small icon and the text "Create New Job". Inside, there is a section titled "Job Name" with a text input field containing "Publish Web Data". Below this is a section titled "Description" with a large text area. At the bottom right, there are three buttons: "Cancel", "< Back", and "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 "Publish Web Data."

### **Specifying Root Paths**

The next panel is used to specify the source and destination root paths that you want to synchronize. Later in the wizard you will specify the source path for the one-way Rule we are creating. In this dialog box, you are simply listing the source and destination paths that will be part of this synchronization.

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."

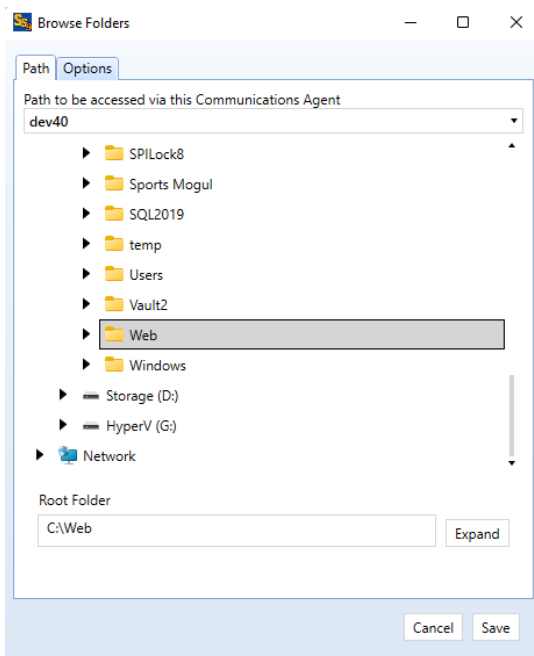


Root paths are added by clicking the “Add” button at the bottom of the panel.

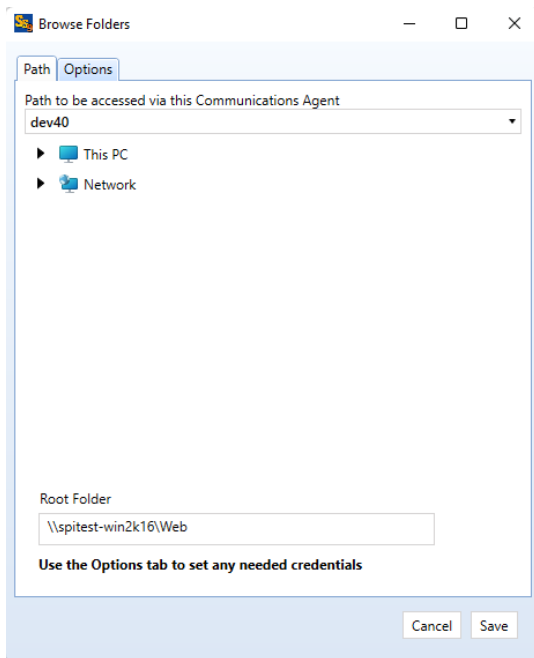
For this example, our root paths are:

- C:\Web on DEV40
- [\\SPITEST-WIN2K16\Web](#) on SPITEST-WIN2K16
- [\\SPITEST-WIN2K19\Web](#) on SPITEST-WIN2K19

First, we will select the local path on *DEV40* by browsing to that path through “My Computer,” highlighting the directory and clicking “OK.”



Once that path has been added, we must add the paths on the remote machines. Click the “Add” button again to add a new path. For UNC paths, you must manually type in the path at the bottom of the panel in the “Root Folder” field shown below.

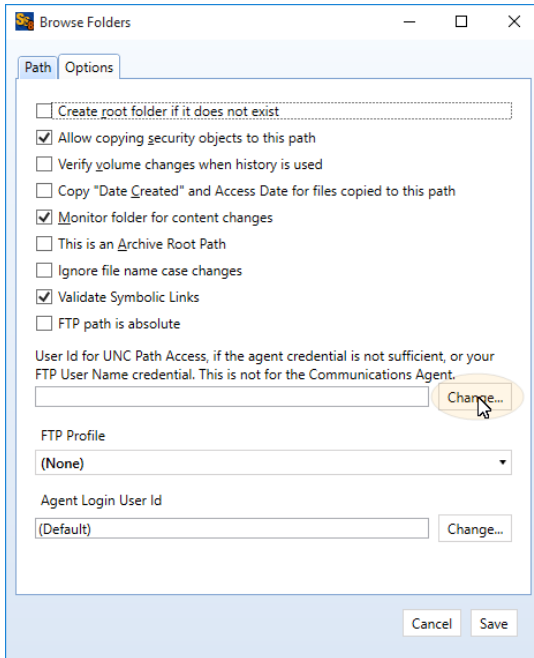


If you select a drive mapping, the path will be converted to a UNC path. Drive mappings are specific to a user so if you execute a Schedule automatically via the Scheduler service and are not logged in a drive mapping would fail. A UNC path points to the same resource but is always available.

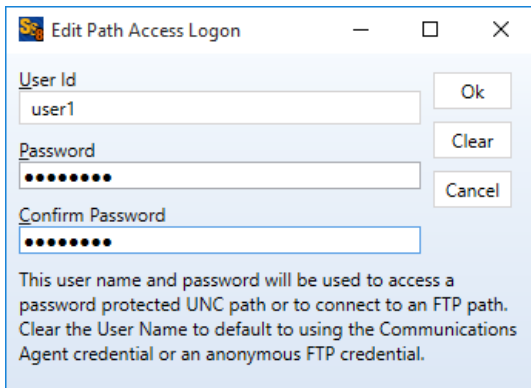
By default, SureSync will access UNC paths using the credential defined earlier for the Communications Agent. In some cases, this credential will not be valid on the remote UNC path. For example, if you’re on a workstation running as a local account and trying to access a resource on a domain or a non-Windows machine.

In these cases, you must define a specific credential for the UNC path to use. This is done by clicking on the Options tab and clicking on the “Change...” button for the “User Id for UNC path access” option as displayed below.

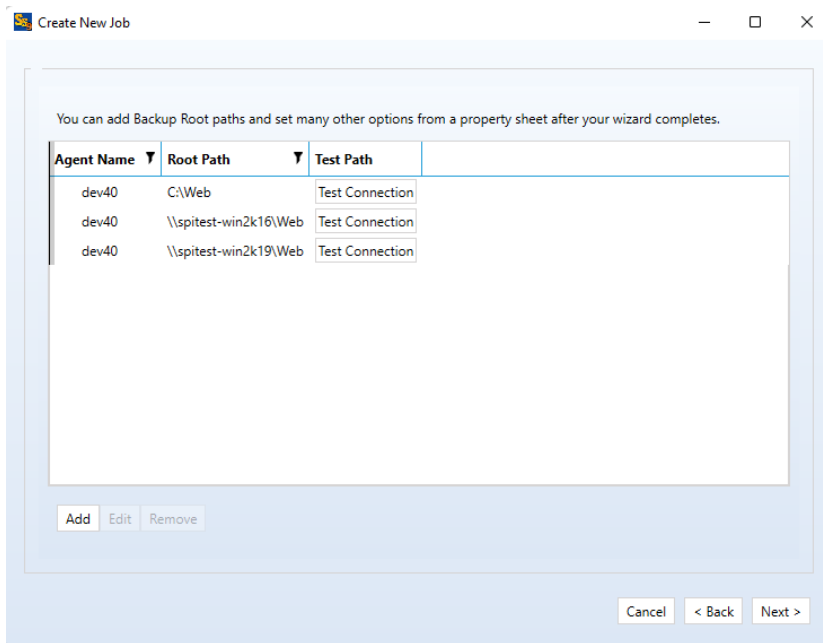




In the dialog box that appears, enter a correct user ID and password for accessing the UNC path in question and then click the “OK” button.



Click “Save” 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**

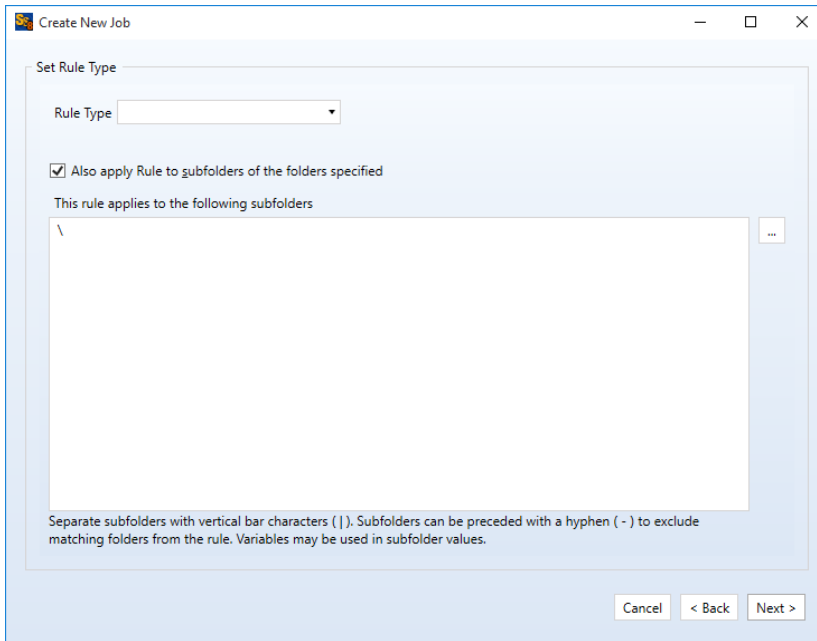
SureSync offers several different replication & synchronization methods, allowing a great deal of flexibility in how your data is handled. A chart detailing each of these Rules can be found in the help file under “Rule Methods Summary.”

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

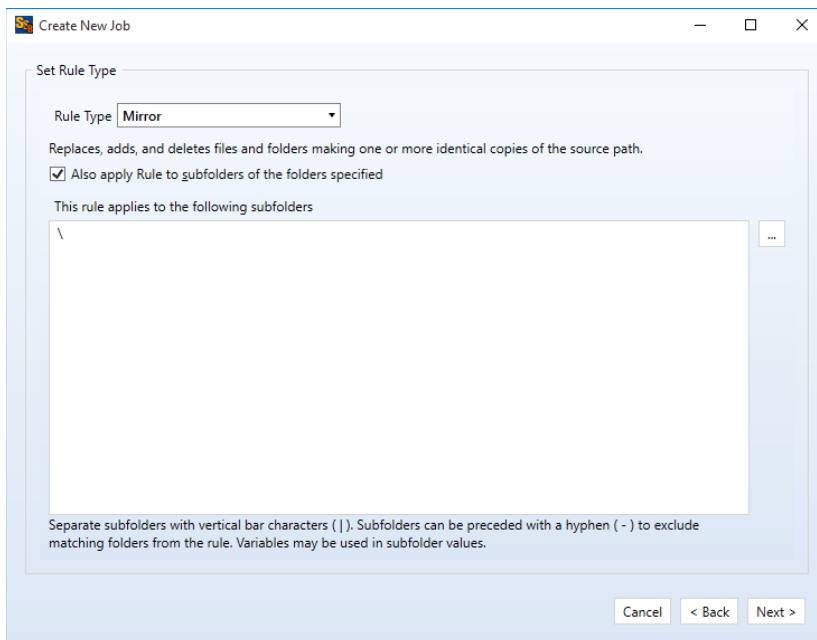
On this next panel we will specify the Rule to use for this job.

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 “Mirror.” The panel will load looking like the screenshot below.



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

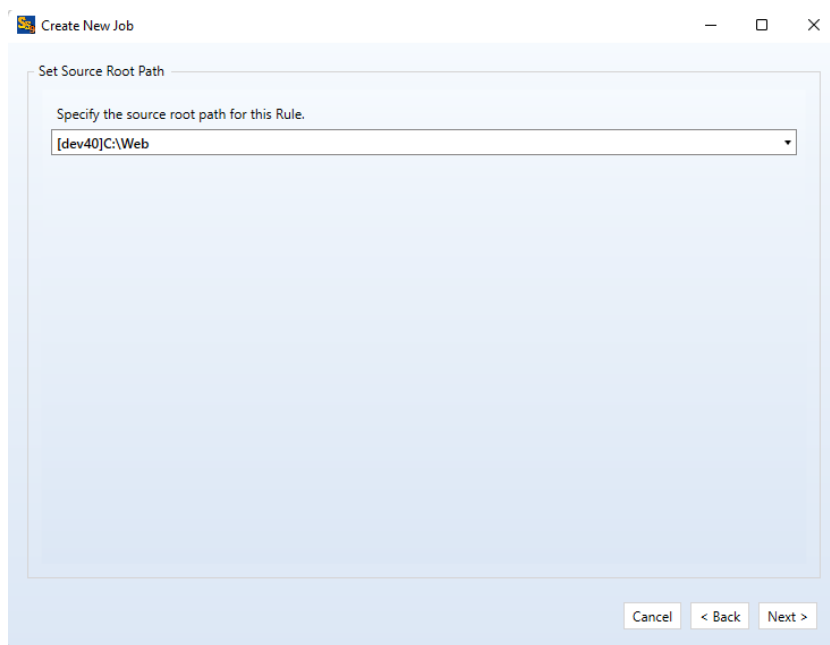
To learn more about how to include and exclude subfolders, press the “F1” key on this panel.

Click the “Next” button to continue.

### **Selecting the Source Path**

The next panel is where you indicate the source root path. This is done by selecting the path from the drop-down menu. All other paths are configured as destinations. In this example, the source path is the C:\Web folder on *DEV40*.

Your wizard panel should look like:

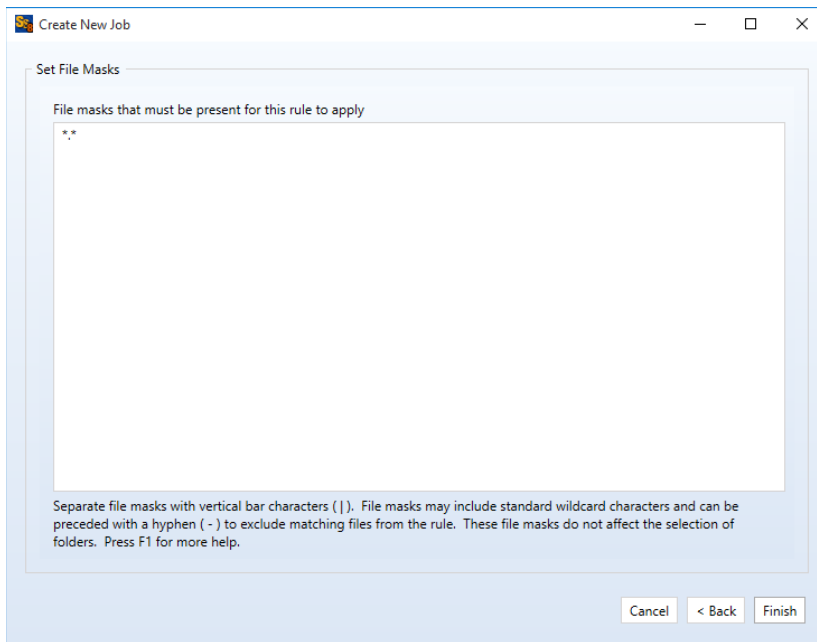


Click the “Next” button to continue.

### **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**

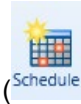
SureSync provides two methods to preview the actions that will be performed by a Job. The first option is the Preview that provides a graphical user interface display of all actions that would be performed without doing them. To launch a Preview, click on the Job in the SureSync Desktop and click on 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.

## Creating a Schedule

A Schedule is used to run a Job or set of Jobs on a clock/calendar basis. For example, you could run the Schedule once every hour, once a day, or once a week.

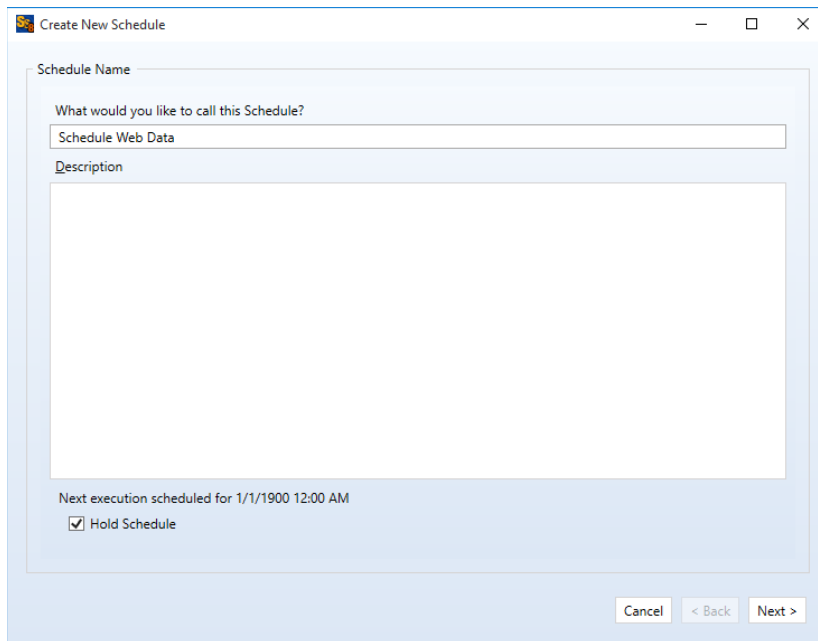
A Job can only be active once at a given time. If you're planning to run a Job using a Schedule you should not attempt to run the same Job with a Real-Time Monitor. If you already are running a Job in a Real-Time Monitor it cannot be run in a Schedule until the Real-Time Monitor is stopped.



To create a Schedule to run your Job automatically click on the “Create Schedule” button on the ribbon bar. This will launch the appropriate wizard.

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

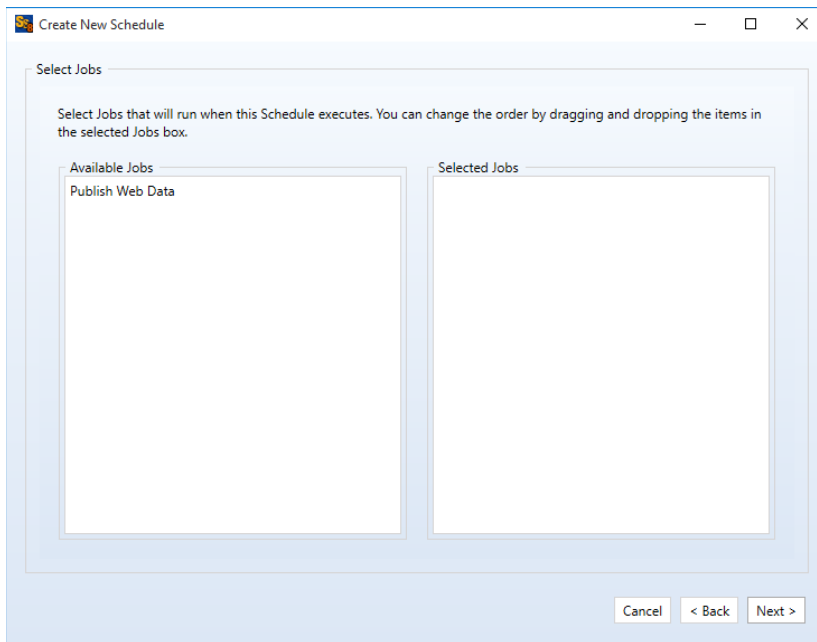
### **Name Your Schedule**

A screenshot of a Windows-style dialog box titled "Create New Schedule". It has a light blue background and standard window controls (minimize, maximize, close) in the top right. The dialog is divided into two main sections. The top section is labeled "Schedule Name" and contains a text box with the prompt "What would you like to call this Schedule?". Below this is a text box containing the text "Schedule Web Data". The bottom section is labeled "Description" and contains a large, empty text area. At the bottom of the dialog, there is a status line that says "Next execution scheduled for 1/1/1900 12:00 AM" and a checkbox labeled "Hold Schedule" which is currently checked. At the very bottom right, there are three buttons: "Cancel", "< Back", and "Next >".

The first panel allows you to name your Schedule. Enter the name of the Schedule and an optional description. Then click “Next” to continue.

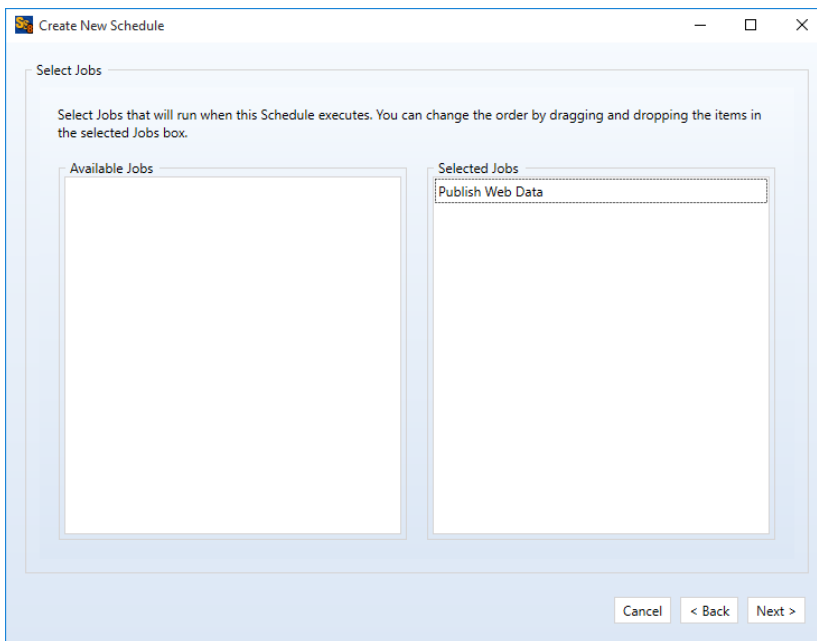
### **Selecting What Job(s) to Run**

The next panel is where you specify the Job(s) you would like this Schedule 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 Schedule. To do so, add all the Jobs you want this Schedule to run under the “Selected Jobs” column. The Jobs will be run in the order listed. To modify the order of execution simply click on one of the Jobs and drag it up or down the list to change the order.

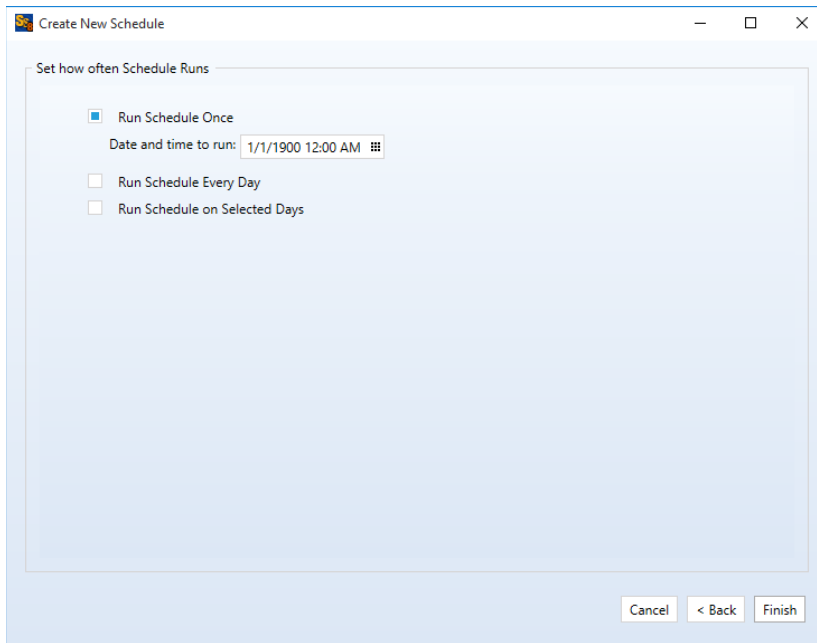
For our example, drag and drop the “Publish Web Data” Job into the “Selected Jobs” column. The panel should now look like this:



Click the “Next” button to continue.

## **Configure Scheduling Options**

The next panel of the wizard determines the scheduling options for the Schedule.



From this panel, you can configure a Schedule to be run once, run every day, or run on selected days.

For our example, we want the Schedule to run every day of the week and execute once an hour.

To do so, select "Run Schedule every day." This option tells the Schedule to execute once a day every day. You can also configure a start date and time using the "Date to start running" and "Time to start running" options. For this example, we will leave those at default.

To configure the Schedule to run multiple times in a single day, like the once an hour we desire for this example, you should check "Run Multiple Times Each Day." For the "Time between each execution (hours:minutes)" option enter "01:00." This configures the Schedule to run once every hour.

The completed panel should look like this:



Click the “Finish” button to create the Schedule with the selected settings.

### **Modifying and Running Your Schedule**

When the wizard is complete you will be returned to the SureSync Desktop and the Schedule you created will be displayed.

You can make changes to the options for your Schedule in the main SureSync window by first clicking on the Schedule 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.

By default, Schedules are created in a held state. To allow the Schedule to be run, click on it in the SureSync Desktop. On the General tab unchecked the “Hold Schedule” option and click Apply.

## **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.

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:

[Dropdown Menu] [New] [Remove]

Profile Name: Enter SMTP 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

SMTP Server Credentials: Click to set the SMTP server credentials

[Cancel] [Apply]

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.

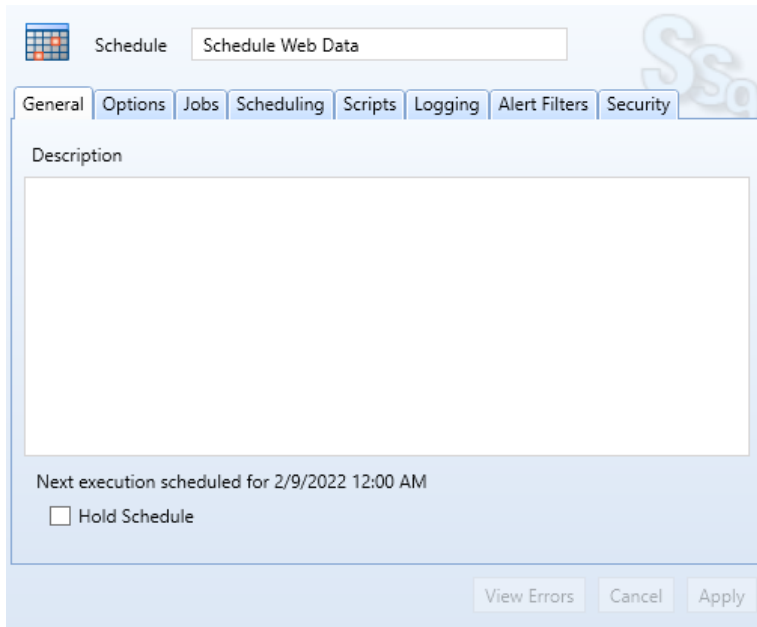
### **Configuring the Schedule to Send Alerts**

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

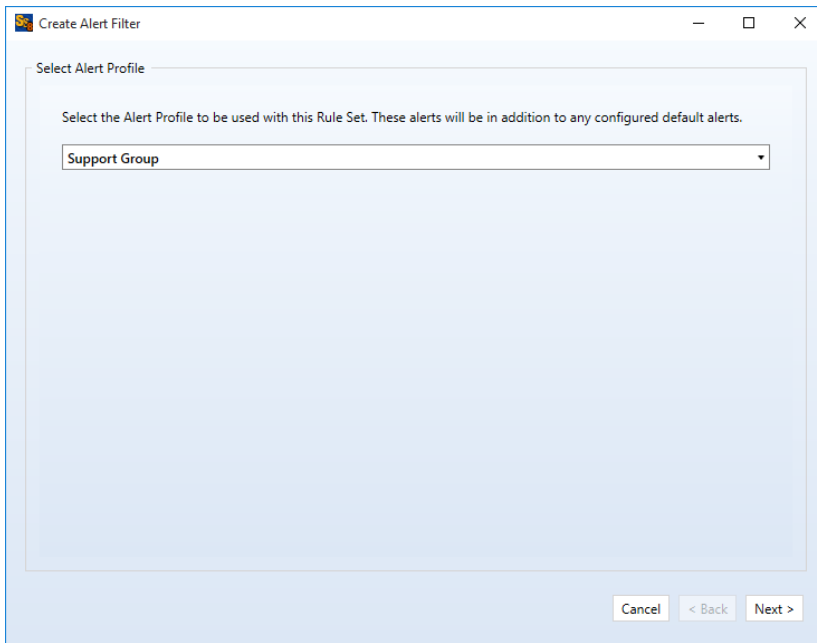
A global Alert Filter can be defined on the Alerts tab of Options. These global Alert Filter settings are inherited by all Jobs, Schedules and Real-Time Monitors defined in the database. Global Alert Filters can be overwritten for a specific Job, Schedule, or Real-Time Monitor as appropriate.

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.

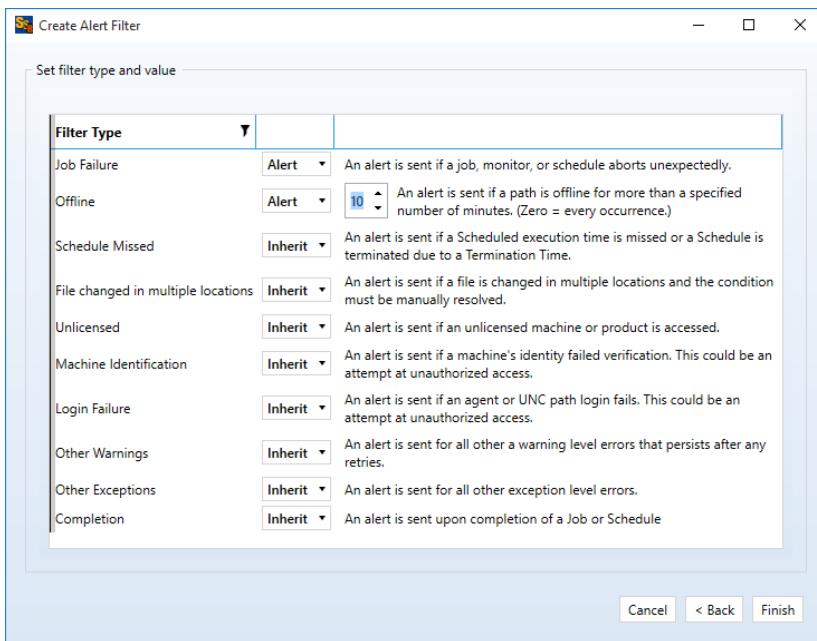
Click on the “Schedule Web Data” Schedule and click on the “Alert Filters” tab.

The screenshot shows a software interface for configuring a schedule. At the top, there's a 'Schedule' dropdown menu with 'Schedule Web Data' selected. Below this is a row of tabs: 'General', 'Options', 'Jobs', 'Scheduling', 'Scripts', 'Logging', 'Alert Filters', and 'Security'. The 'Alert Filters' tab is currently active. The main area of the window is titled 'Description' and contains a large, empty text box. Below the text box, it says 'Next execution scheduled for 2/9/2022 12:00 AM' and has a checkbox labeled 'Hold Schedule' which is currently unchecked. At the bottom right of the window are three buttons: 'View Errors', 'Cancel', and 'Apply'.

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.

Schedule Web Data

General Options Jobs Scheduling 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
---	---------------------------------	---	---	---	---------	-----	---	---	---	---	---	---	---