



Upgrading to Version 9



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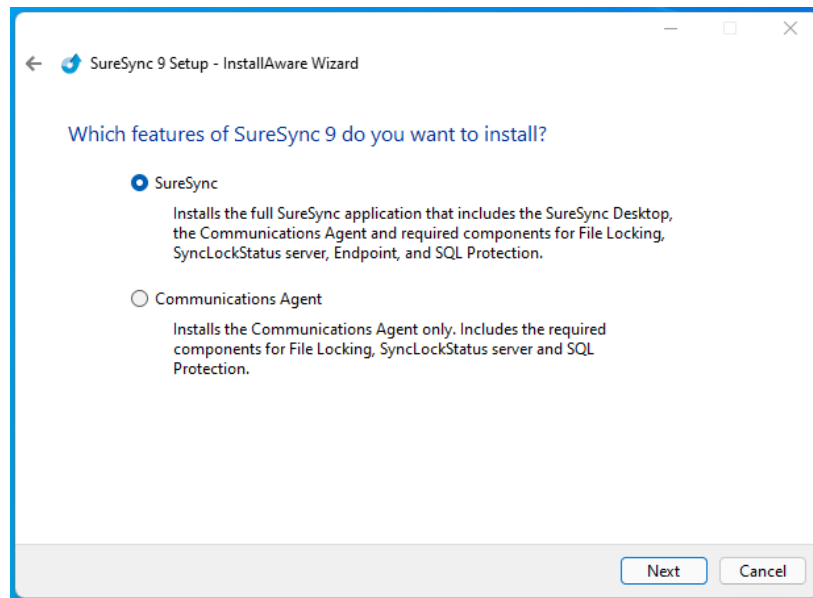
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Introduction

This document outlines the process of upgrading to SureSync 9 from all supported previous releases. Please carefully follow the steps in this document to ensure a smooth upgrade.

If you are looking for instructions for upgrading from an old SureSync 9 version to the current release, please consult the [Updating SureSync 9 knowledge base article](#).

The SureSync installer provides two setup options for installing SureSync or the Communications Agent. This is accomplished by selecting an installation type on the panel shown below.



System Requirements for SureSync 9

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 SP1; Windows 11; Windows 10; Windows 8.1; Windows 8; Windows 7
- **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 2003, and non-Windows machines such as Macintosh and Linux machines via UNC path but the software itself must be installed on one of the supported operating systems listed above.

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 database to store configuration information. The following formats are supported:

- SQL Express, 2012, 2014, 2016, 201, 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 several 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.

Consider installing the required components with Windows Update or a third-party patch management tool before upgrading. This ensures that all machines have the necessary components before you start.

Considerations before Upgrading

SureSync v9 is a major upgrade. This section outlines changes in SureSync v9 that you should be aware of before attempting to upgrade.

Rescan of all Jobs, Schedules and Real-Time Monitors Required

When your database is converted from previous versions of SureSync to v9, some information will not be ported over:

- File history and Change Journal Checkpoints
- Alerts already in the database
- Job Logs
- Job Statistics table

The switch to SQL only has allowed for new database optimizations. Enhancements have been made to the way directory scans and retries are processed. These changes require the rebuilding

of file history and Change Journal Checkpoints to support the new system. A full scan will be performed on the first execution of a Job, Schedule or Real-Time Monitor to rebuild these items.

If your Jobs contain a large number of files, you should strongly consider using the “Staged” upgrade approach. The full scans can cause some delay in changes being processed while the scan is occurring. With the “Staged” approach, most of the environment continues to run on the old version. You would stop a Job in the old version and start it in v9. This allows the rest of your environment to continue synchronizing while the one Job completes its scan in v9. Once that Job is done scanning, another one can be moved until the entire environment is on v9.

Communications Agent Port Changes

SureSync 9's Communications Agent uses a single port instead of the port range found in SureSync 6 and older. This eases firewall configuration and eliminates issues related to running large numbers of Schedules or Real-Time Monitors concurrently. The default port in SureSync 9 is TCP 9031.

Previous SureSync versions used different port numbers and ranges. If using the default port, you will likely need to make configuration changes to firewalls in your environment.

Version	Port(s)
SureSync 8	9032
SureSync 7	9033
SureSync 6	9002-9033
SureSync 5	9002-9033
SureSync 4	8002-8033

If upgrading from SureSync 5 or 6 and your firewalls were configured correctly, SureSync 9 should work out of the box. Once the old version has been fully retired, you can modify firewalls to allow only the 9031 port used by SureSync 9.

It is possible to configure SureSync 9 to use an existing open port from a prior version. You would use the Local Communications Agent Configuration Utility to change the port for v9 on each machine. The port number also must be changed under each Computer record in the SureSync Desktop. Doing so is strongly discouraged because it requires a manual configuration change for each machine. In most network environments, there are fewer firewalls to configure than Communication Agent installations.

Endpoint No Longer Available

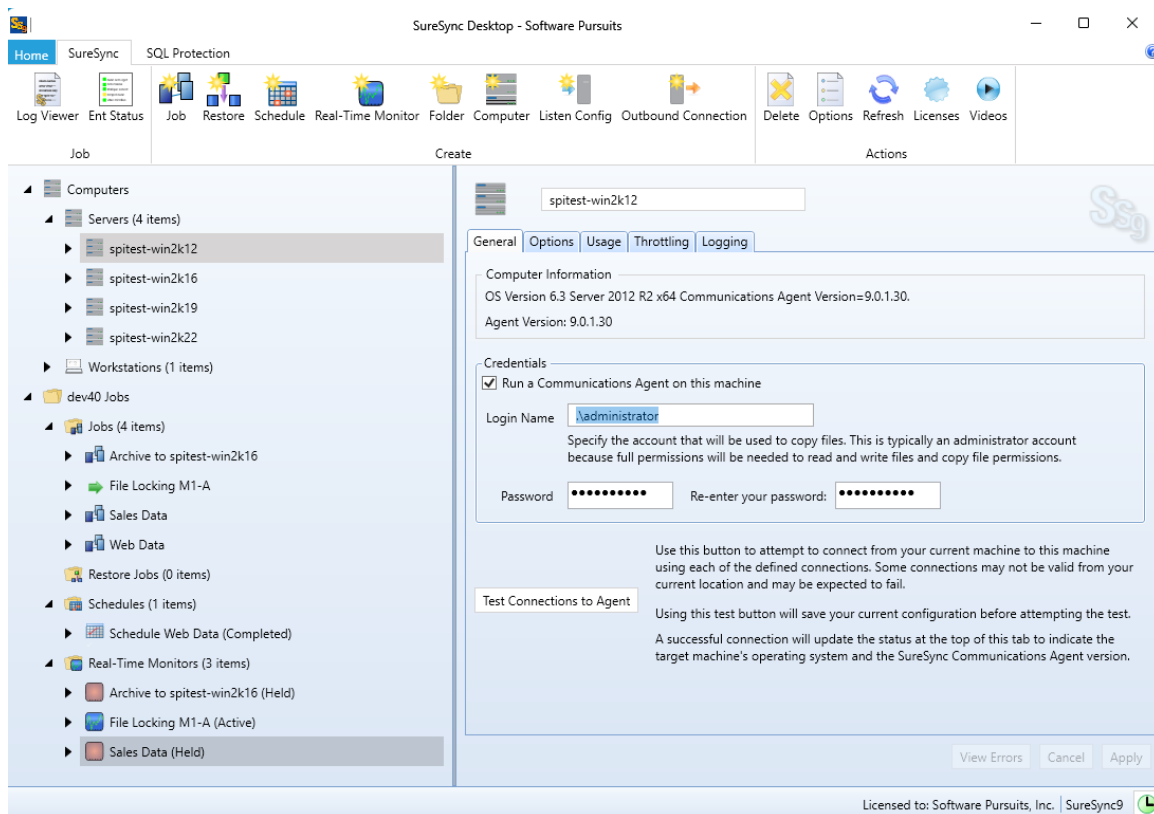
Due to architectural changes in SureSync 9 and the move to SQL only databases, Endpoint is no longer available.

If you're an Endpoint user, please contact our sales team for a special offer to transition to SureSync MFT for the next generation of Endpoint functionality.

Communications Agent Configuration Changes

In v7, a Communications Agent would be configured under Home | Communications Agents | Configure Communications Agents. This section of the program has been eliminated.

In v9, you will see a “Computers” node in the left-hand tree view of the SureSync Desktop. An upgraded database will automatically show your servers and workstations in this view. All the configuration options such as username and password are available by clicking on the machine in question and navigating through the settings.



Microsoft Prerequisites

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

Remote Differential Compression (RDC)

Delta copies are provided with Microsoft’s Remote Differential Compression (RDC) technology. RDC is an incredibly efficient delta engine for synchronizing the changed portions of a file over slow connections. This technology must be enabled on all the machines involved to have delta copies function within your environment. When using the Communications Agent Add-on, if Remote Differential Compression is not installed on a machine, the software will automatically revert to copying full files.

For server operating systems, you can confirm RDC is enabled by launching Server Manager, clicking on Features and then checking under Features Summary for Remote Differential Compression. If RDC is not installed, click “Add Features,” check “Remote Differential

Compression,” and follow the rest of the “Add Feature Wizard” prompts to install the necessary components.

For workstation operating systems, you can confirm RDC is enabled by launching Control Panel, then going to Programs and Features, clicking on “Turn Windows features on or off” and then checking for “Remote Differential Compression.” If not installed, simply check the box and click the “OK” button to install the necessary components.

Considerations for v6 and older

These changes were implemented in SureSync v7. If you are upgrading from v6 or older, you should review these changes.

Terminology Changes

SureSync v7 introduced some terminology changes that continue to be used in v9.

Relation Renamed to Job

The term Relation is no longer used. Relations are now referred to as Jobs.

SPIAgent Renamed to Communications Agent

The SPIAgent has been renamed to the Communications Agent. This name more accurately reflects the purpose of the service. The rest of this guide will refer to the SPIAgent as the Communications Agent when discussing the SureSync 9 version.

Coexistence of Versions

The Communications Agent for SureSync 9 will not communicate with older versions. An option to have SureSync 9 co-exist with older versions on the same machine is available. This allows you to plan for a staged upgrade where you move individual Jobs, Schedules and/or Real-Time Monitors to the new release as time permits.

For example, an effective upgrade strategy for a large environment is to install the relevant SureSync 9 software on all machines involved before upgrading your database. This allows you to deploy the software as time allows while the older SureSync version continues to synchronize / replicate your data. Once all the software is deployed, the database on the main SureSync machine can be upgraded and the environment switched over to the new release.

Elimination of [Local Agent] Definition

In SureSync 9.x, you can no longer reference paths by the [Local Agent] definition. When your SureSync database is upgraded, all [Local Agent] references will be automatically changed to the named agent for the Scheduler. This is most often your local machine where SureSync is installed.

If no Scheduler is defined, the machine name running SureSync is used. For example, assume SureSync is installed on Server1 and the Scheduler is installed there. When you launch SureSync and upgrade your database, all the [Local Agent] references will be replaced with Server1 references. The named agent is used even when synchronizing to UNC paths or FTP paths.

In addition, you must define a username and password for the local machine's agent. This is accomplished using the tree view in the SureSync Desktop. Expand "Computers" and click on the machine name under either Servers or Workstations. Check "Run a Communications Agent on this machine," enter a username in domain\user or machinename\user format and a password. Click the "Apply" button to save the change.

Update Deployment Methods

The remote SPIAgent machines cannot be upgraded using the SyncCmd /U operand. This tool is provided to aid in upgrading minor releases only (such as from 6.0.33 to 6.0.xx). When performing a major upgrade (such as from 6.0.33 to 8.0.xx) you must run the installer on each machine.

The Deploy Updates method of distributing updated Communications Agent components has been removed from the product. The SyncCmd /U option should be used instead.

Multi-Threaded Synchronization Engine

The multi-threaded synchronization engine in SureSync 9 is extremely powerful. This engine can have a greater impact on system resources than older versions.

The multi-threaded engine was introduced in SureSync 6. If you're upgrading from SureSync 6, the load placed on your machines should be similar.

If you're upgrading from SureSync 5 or older, understanding the difference in load placed on the machines involved in a synchronization Job is important. The multi-threaded engine is optimized to spawn the same number of copy threads as CPUs or CPU cores present on the SureSync machine. For example, if you have a quad core processor in the SureSync machine, each running Job, Schedule or Real-Time Monitor will default to spawning 4 copy threads. If that quad core machine has hyper threading enabled, then it will appear as 8 cores and 8 copy threads will be used.

Consider an environment running 5 Real-Time Monitors on a quad core machine. With older SureSync versions, the maximum number of file copies occurring at any one time would be 5. With SureSync 9, the maximum number of file copies occurring at any one time by default jumps to 20. If you're running many Schedules and/or Real-Time Monitors, you could overwhelm slower machines or your network with these additional active file copies. This can result in problems such as chronic path drops.

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

If you have a large quantity of Jobs, Schedules or Real-Time Monitors that run at the same time, you should consider setting the product to run single threaded for your initial deployment. This is controlled using Priorities. For Schedules, the Priority used is defined on the Options tab. For a Real-Time Monitor, the Priority options are defined on the Intervals tab. The configuration of Priorities is done by clicking the Home button, selecting Options and selecting the Priorities tab. The option "Maximum number of worker threads" controls the number of threads each process will consume. Setting this option to 1 will make each running job operate single threaded like

older SureSync versions. You can then increase the threads and monitor the impact of the additional threads.

Upgrading to SureSync 9

This section will outline the process of upgrading your environment to SureSync 9. Details are provided for both “In Place” and “Staged” upgrade types. Please follow these instructions carefully.

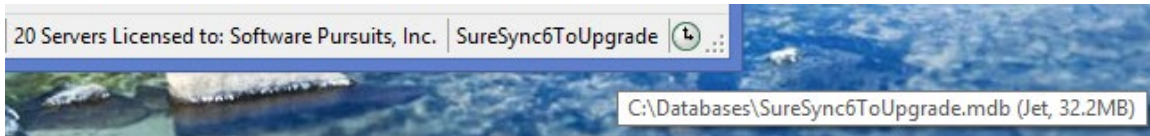
Step 1: Prerequisite Checklist

Important: Once you have upgraded your licenses to v9, you will be unable to activate/deactivate licenses on your previous version. If you're intending to do so, process these before upgrading to v9.

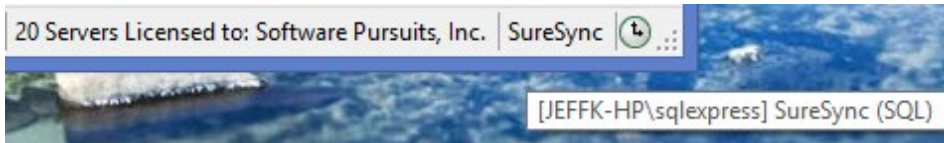
Before proceeding with your upgrade, make sure you have done the following steps.

- ☐ Obtain a valid SureSync 9 license. Licenses from previous versions will not be recognized by SureSync 9. Please call +1-650-372-0900 or send an e-mail to Sales@SoftwarePursuits.com to purchase an upgrade license. The upgrade is free to those with an Upgrade & Support Plan. For those with a plan, the licenses can be upgraded automatically using our [SureSync Licensing web service](#).
- ☐ Download the current version of SureSync 9 from the [SureSync Download page](#).
- ☐ Ensure that all necessary Microsoft prerequisites are installed. This can be done before installing SureSync or the SureSync installer can install them for you. Please consult the “System Requirements for SureSync 9” section of this document for more details.
- ☐ If you are planning to use Remote Differential Compression (RDC) for delta support, ensure that all machines involved have the RDC components installed using the instructions in the Remote Differential Compression (RDC) subsection of “Considerations before Upgrading.”
- ☐ Run Windows Update on all machines involved to ensure your systems have all the latest .NET patches from Microsoft.
- ☐ Review your firewall configuration and ensure that TCP port 9031 is open in any firewalls. SureSync 9 uses a different port than prior versions. This allows it to co-exist with older versions. You can use the existing firewall rule configuration for the older version of SureSync as a template for what rules need to be added to allow traffic through for version 9.
- ☐ Determine upgrade type for your SureSync environment.
 - ☐ “In Place” upgrade where all your previous version SureSync Jobs, Schedules and Real-Time Monitors are transitioned to SureSync 9 at once.
 - ☐ “Staged” upgrade where you will transition Jobs, Schedules, and Real-Time Monitors individually while still running some work in the old SureSync version.
- ☐ Note the location of your previous SureSync version's database. To do this, launch the SureSync Desktop. In the lower left-hand corner of the user interface, next to the Scheduler clock icon will be your database name. Placing your mouse over that name will present a tooltip that shows either the Access or SQL details for your database.
- ☐ Note the user ID your Scheduler service is running under by launching the services MMC and looking at the Log On tab of the Software Pursuits SureSync Scheduler Service for the old version of the software.

Example Access Database Details



Example SQL Database Details



Format of the SQL details is [Server\Instance] Database Name.

Step 2: Deploy the SureSync 9 Software

SureSync 9 will co-exist with older versions of the software. To ensure the smoothest upgrade possible, the v9 software should be deployed to all the machines involved in the SureSync environment before attempting to upgrade the database and transition your synchronization / replication to the new version. This allows you to install all required prerequisites and SureSync software without impacting your production SureSync tasks.

Important: SureSync 9 uses a different TCP than other SureSync releases. This is outlined in the “Considerations Before Upgrading” section at the beginning of this document. This allows SureSync 9 to co-exist with prior versions.

Do not attempt to upgrade until you have opened TCP Port 9031 in any firewalls between the agent machines. The easiest way to do this is to look in the firewall configuration for the rule for your prior version of SureSync, clone that rule and change the port number.

You may have change control procedures in your environment, so you may have to wait until you have approval, and the appropriate team can make the necessary changes.

To complete this step, do the following:

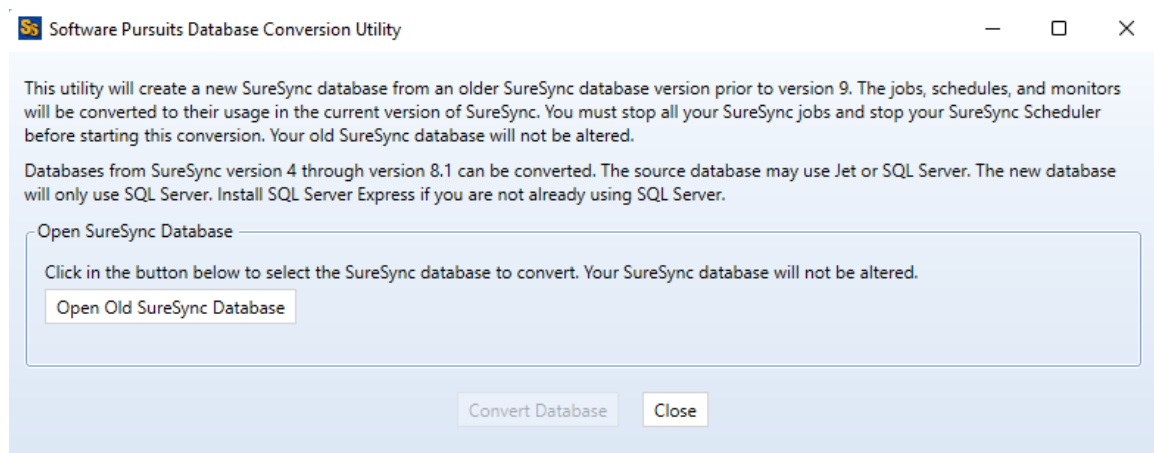
- ❑ Locate all machines running the full SureSync application. These are the machines where you have databases configured that are running your synchronization / replication tasks. Most environments contain one SureSync machine.
- ❑ Install SureSync 9 on each of the machines running a full SureSync installation. If you're upgrading from SureSync 6, 7 or 8, the installer will automatically detect the appropriate setup type that is on the machine and set the SureSync 9 installer to install the same setup type. If you're running an older release, you will select SureSync on the “Which features of SureSync do you want to install” panel of the installation wizard.
- ❑ Locate all machines running the SPIAgent (v6) or Communications Agent (v7/v8). For v6, a list of SPIAgent machines can be obtained from the Tools menu by selecting SPIAgent Setup and looking through the drop-down list for machines that have “Run the SPIAgent Service on this computer” checked. For v7, click on Home | Communications Agents | Configure Communications Agents. Click on the Computers tab look through the drop-down list for machines that have “Run a Communications Agent on this machine” checked. For v8, expand the Computers node in the left tree view of the Desktop. Click

- on each machine and check for the “Run a Communications Agent on this machine” option on the General tab.
- ❑ On the machines running the SPIAgent or Communications Agent, run the SureSync 9 installer. If you're upgrading from SureSync 6, 7 or 8, the installer will automatically detect the appropriate setup type that is installed on the machine and set the SureSync 9 installer to install the same setup type. If you are running an older release, you will select “Communications Agent” on the “Which features of SureSync do you want to install” panel of the installation wizard.
 - ❑ All Jobs, Schedules and Real-Time Monitors should be stopped. Schedules and Monitors should be placed on hold. This is done on the General tab of the Schedule or Monitor by checking the option to place on hold at the bottom of the tab. In staged upgrades, you will turn Schedules and Real-Time Monitors back on in the old version where appropriate later in the process.

Step 3: Upgrade the SureSync Database

You will now upgrade your SureSync database to the v9 level. Your existing SureSync database will not be altered. This process creates a new SureSync 9 version of the database with all your Job configuration in place.

To begin, go to Start | All Programs | SureSync 9 and launch the SureSync 9 Database Conversion Utility.



Click the ‘Open Old SureSync Database’ button to begin the process.

The following panel will be displayed that is used to provide the details for the old SureSync database.

Open an Existing SureSync Database

☐ Open an existing Access/Jet database
☒ Open an existing SQL Server database

SQL ServerName\InstanceName
dev40\sqlexpress

Any SQL Server Failover Partner (mirrored) as ServerName\InstanceName
Enter: ServerName\InstanceName

Name of the SQL Database
SureSync

SQL Server account name or blank for Windows authentication
Enter: Account Name

Password for SQL Server account or blank for Windows authentication
[Empty field]

Re-enter your SQL Server password
[Empty field]

Cancel Continue

Provide the details for your existing version's SureSync database and click "Continue."

Software Pursuits Database Conversion Utility

This utility will create a new SureSync database from an older SureSync database version prior to version 9. The jobs, schedules, and monitors will be converted to their usage in the current version of SureSync. You must stop all your SureSync jobs and stop your SureSync Scheduler before starting this conversion. Your old SureSync database will not be altered.

Databases from SureSync version 4 through version 8.1 can be converted. The source database may use Jet or SQL Server. The new database will only use SQL Server. Install SQL Server Express if you are not already using SQL Server.

Open SureSync Database
SQL: dev40\sqlexpress, SureSync

New SureSync Database
Click in the button below to create a new SureSync 9 database or select an empty database for your output.
Specify Output Database

All converted Jobs will be Held.

Convert Database Close

Click on the "Specify Output Database" button.

Open or Create Database

This form is used to open or create a database. Select an existing SureSync database or use the buttons for other actions.

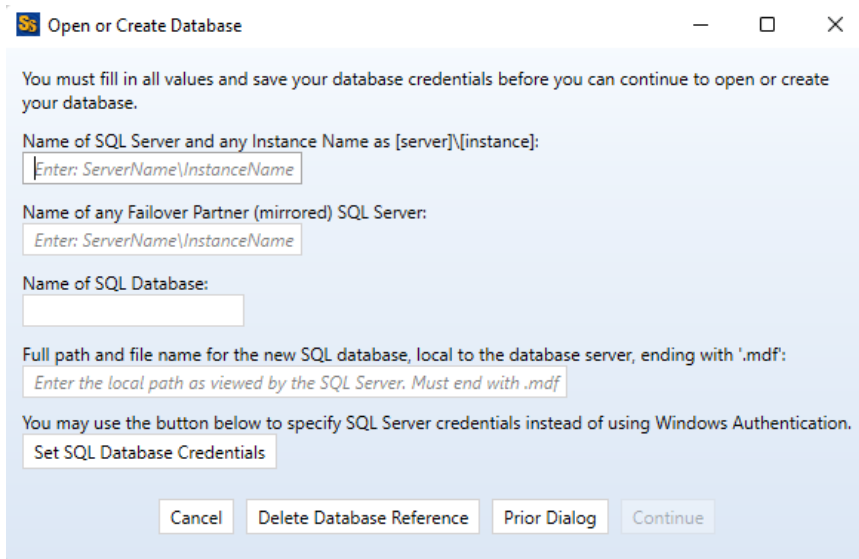
Select an existing SureSync database:
[Select a Database]

Create a new database Use an empty database

Open an unlisted database Cancel

Click on the “Create a new database” button.

You can also use an existing empty database on the SQL server by clicking the “Use an empty database” button. This is helpful in some high security environments where the user account provided does not have permission to create a database.



Enter the following information to create the new SureSync 9 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.

An example completed panel looks like this:

Open or Create Database

You must fill in all values and save your database credentials before you can continue to open or create your database.

Name of SQL Server and any Instance Name as [server]\[instance]:
dev40\sqlexpress

Name of any Failover Partner (mirrored) SQL Server:
Enter: ServerName\InstanceName

Name of SQL Database:
SureSync_v9

Full path and file name for the new SQL database, local to the database server, ending with '.mdf':
G:\Databases\SureSync_v9.mdf

You may use the button below to specify SQL Server credentials instead of using Windows Authentication.
Set SQL Database Credentials

Cancel Delete Database Reference Prior Dialog Continue

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.

You will see status indicating the database is being created:

Open or Create Database

You must fill in all values and save your database credentials before you can continue to open or create your database.

Name of SQL Server and any Instance Name as [server]\[instance]:
dev40\sqlexpress

Name of any Failover Partner (mirrored) SQL Server:
Enter: ServerName\InstanceName

Name of SQL Database:
SureSync_v9

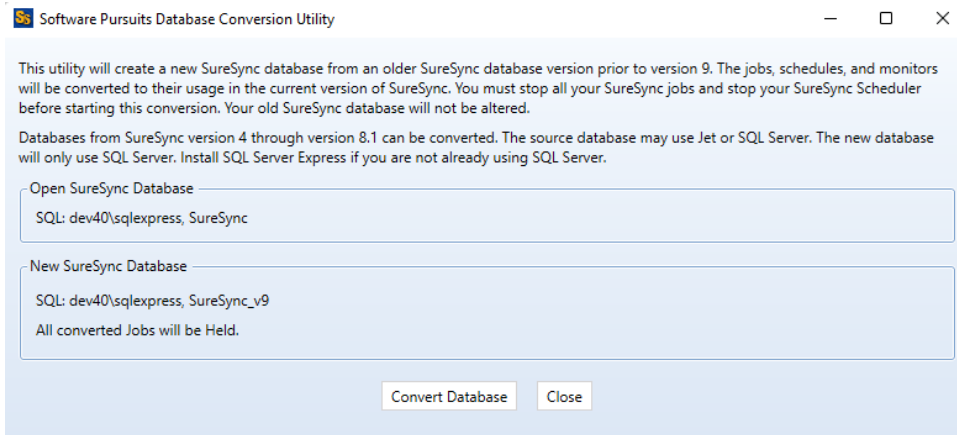
Full path and file name for the new SQL database, local to the database server, ending with '.mdf':
G:\Databases\SureSync_v9.mdf

You may use the button below to specify SQL Server credentials instead of using Windows Authentication.
Set SQL Database Credentials

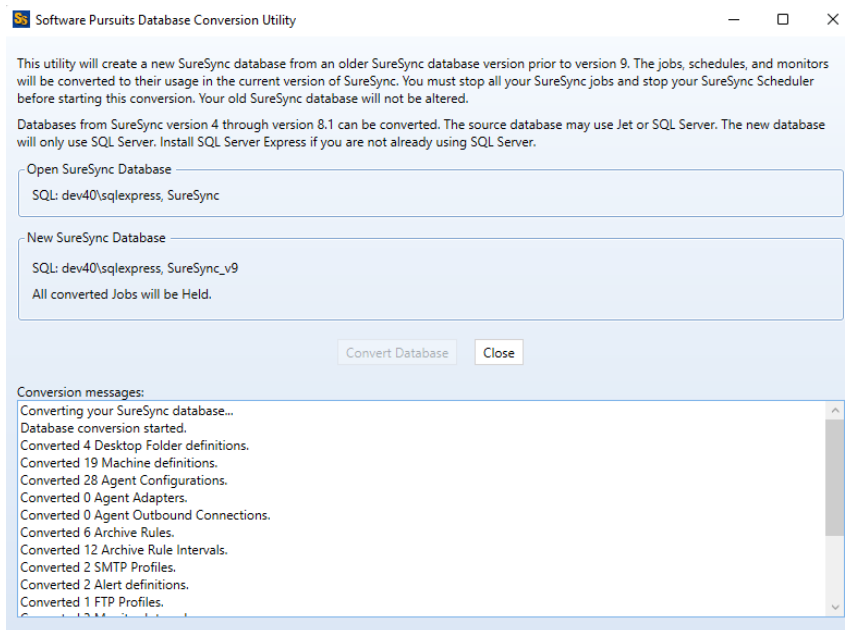
Cancel Delete Database Reference Prior Dialog Continue

Creating and initializing a new database...

Once the database is converted, you will be returned to the main panel.



Click “Convert Database” to start the conversion.



The account the Scheduler service will be running under must 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. For example, an account that is already a sys_admin in SQL server would have DBOwner rights by default.

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.

Your database is now upgraded. Click the “Close” button to close the conversion utility. Please continue to Step 4: Completing the Upgrade section of this document to finish your upgrade.

Step 4: Completing the Upgrade

Your upgrade to SureSync 9 is almost complete. Please follow the steps below to complete the upgrade.

“In Place” Upgrade: Completing the Upgrade

With an “in place” upgrade, all of your synchronization tasks will be launching in SureSync 9 and your previous version retired from production. Please do the following:

- ☐ Ensure all Jobs, Schedules and Real-Time Monitors in your old SureSync version are placed on hold using the SureSync Desktop for that version.
- ☐ Launch the SureSync Desktop. You will receive a message about machines not being licensed. This occurs because SureSync 9 requires an updated license file. This warning can be safely ignored by clicking the “OK” button. To install your new license, click on the “Home” button, then click “Licenses,” then click on the “Import License...” button. Follow the instructions to import your new SureSync 9 license.
- ☐ It is strongly recommended that you look through all your Jobs to ensure that all your paths are accurate. This is especially important if you previously had [Local Agent] references (v6 and older). You want to make sure the machine that the upgrade converted your [Local Agent] references to is the correct machine for those paths.
- ☐ User credentials must be supplied for the local SureSync machine if used in Jobs. This is required even if you’re not using the Communications Agent Add-on and are synchronizing via UNC path. To supply the credential, expand the Computers node on the left pane of the SureSync Desktop. Expand Servers or Workstations as appropriate to locate the SureSync machine. Click on that machine and ensure that “Run a Communications Agent on this machine” is checked and a valid credential is defined. Clicking “Test Connection to Agent” will confirm the login is successful.
- ☐ Install the Scheduler service by clicking on Home in the SureSync Desktop and selecting “Scheduler Services.” Click on the “Install” button and provide the appropriate user account details and click “Save.” You will receive a message that the Scheduler service was installed successfully. Click on the Scheduler name and click on the “Start” button.
- ☐ Verify the following services are running.
 - ☐ “Software Pursuits SureSync 9 Communications Agent.”
 - ☐ “Software Pursuits SureSync 9 Scheduler Service.”
- ☐ Take your Schedules and Real-Time Monitors off hold. You’re now running SureSync 9!
- ☐ You will want to activate your licenses for SureSync 9. To do so, click on the Licenses button in the SureSync Desktop ribbon bar. Click on the “Activations...” button. Check “Activate” for each machine that needs activation and then click either the “Activate, Deactivate, or Refresh via Internet” button or the “Export Activation/Deactivation Request” button to create a file to be sent to Software Pursuits for offline activation.
- ☐ Remove old versions of SureSync using “Add/Remove Programs” on each machine involved.

If you’re running a SureSync 8 version older than 8.1.25, the file locking driver will be removed when you remove SureSync 8.

To reinstall the driver, you will need to run a repair on SureSync 9. To do so, launch Programs and Features. Click on SureSync 9 and select Change. Select Repair and click Next three times.

You can also update your SureSync 8 installation to 8.1.25 or later before removing it, and you will not need to repair SureSync 9.

“Staged” Upgrade: Completing the Upgrade

With a “staged” upgrade, you can run some of your Jobs, Schedules and Real-Time Monitors in SureSync 9 while leaving others running under your previous release. This allows you to upgrade large environments in a more controlled manner. However, it also creates some special considerations while doing the transition. Please do the following:

It is essential that you do not overlap paths with SureSync 9 and a previous version. For example, you don’t want a Relation in SureSync 6 synchronizing C:\Data between ServerA, ServerB and ServerC while a SureSync 9 Job does the same thing. You must turn off the synchronization in the old version for a particular synchronization task before enabling it in SureSync 9. Otherwise, you may get unexpected and unpredictable results.

- ❑ Launch the SureSync Desktop. You will receive a message about machines not being licensed. This occurs because SureSync 9 requires an updated license file. This occurs because SureSync 9 requires an updated license file. This warning can be safely ignored by clicking the “OK” button. To install your new license, click on the “Home” button, then click “Licenses,” then click on the “Import License...” button. Follow the instructions to import your new SureSync 9 license.
- ❑ It is strongly recommended that you look through all your Jobs to ensure that all your paths are accurate. This is especially important if you previously had [Local Agent] references (v6 and older). You want to make sure the machine that the upgrade converted your [Local Agent] references to is the correct machine for those paths.
- ❑ User credentials must be supplied for the local SureSync machine if used in Jobs. This is required even if you’re not using the Communications Agent Add-on and are synchronizing via UNC path. To supply the credential, expand the Computers node on the left pane of the SureSync Desktop. Expand Servers or Workstations as appropriate to locate the SureSync machine. Click on that machine and ensure that “Run a Communications Agent on this machine” is checked and a valid credential is defined. Clicking “Test Connection to Agent” will confirm the login is successful.
- ❑ Install the Scheduler service by clicking on Home in the SureSync Desktop and selecting “Scheduler Services.” Click on the “Install” button and provide the appropriate user account details and click “Save.” **Important:** Please note that the user account defined here must have DBOwner permissions on the SureSync database or the Scheduler service will fail to initialize. You will receive a message that the Scheduler service was installed successfully. Click on the Scheduler name and click on the “Start” button.
- ❑ Verify the following services are running.
 - ❑ “Software Pursuits SureSync 9 Communications Agent.”
 - ❑ “Software Pursuits SureSync 9 Scheduler Service.”
- ❑ You can start the services for your old version of SureSync and start up any Schedules or Real-Time Monitors you want to remain running in those releases if they were stopped.
- ❑ When you want to move a Job (Relation in v6 and older), Schedule or Real-Time Monitor to SureSync 9, stop it and place it on hold in your previous SureSync release. You can then start the SureSync 9 version of the same item.
- ❑ You will want to activate your licenses for SureSync 9. To do so, click on the Licenses button in the SureSync Desktop ribbon bar. Click on the “Activations...” button. Check “Activate” for each machine that needs activation and then click either the “Activate, Deactivate, or Refresh via Internet” button or the “Export Activation/Deactivation Request” button to create a file to be sent to Software Pursuits for offline activation.
- ❑ Once all your synchronization tasks are running in SureSync 9, you can remove the old version of SureSync from the environment using “Add/Remove Programs.”

If you're running a SureSync 8 version older than 8.1.25, the file locking driver will be removed when you remove SureSync 8.

To reinstall the driver, you will need to run a repair on SureSync 9. To do so, launch Programs and Features. Click on SureSync 9 and select Change. Select Repair and click Next three times.

You can also update your SureSync 8 installation to 8.1.25 or later before removing it, and you will not need to repair SureSync 9.

Upgrading from a Release Older than SureSync 3

If you are running a release older than SureSync 3 and would like to upgrade to SureSync 9 please contact our technical support department by sending an e-mail message to Support@SoftwarePursuits.com or calling +1-650-372-0900 between 8:00AM and 5:00PM PST Monday through Friday for instructions.