



**Collaboration Bundle
Evaluator's Guide**



Microsoft Partner
Silver Application Development

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Introduction

SureSync is a powerful file replication & synchronization application that can be used to ensure users on your network are always working off of 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. With these Add-Ons, 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

SureSync's basic operating system and hardware requirements are:

- **Supported Operating Systems:** Windows Server 2012 R2; Windows Server 2012; Windows Server 2008 R2; Windows Server 2008; Windows Server 2003 R2; Windows Server 2003 with SP1 or later; Windows 8.1; Windows 8; Windows 7; Windows Vista; and Windows XP with SP2 or later
- **Processor:** Minimum: 1Ghz (x86 processor) or 1.4Ghz (x64 processor). Recommended: 2Ghz or faster processor (x86 or x64 processor)
- **RAM (total for system):** 1GB (Minimum); 2GB (Recommended)
- **Hard Disk:** 30MB for application files; 20MB+ for database
- **Display:** 1024x768 high color, 32-bit (Minimum)

SureSync can synchronize data to and from machines running operating systems such as Windows 95, Windows 98, Windows NT 4.0, Windows 2000 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.

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 requires a database that is used to store configuration information. The following formats are supported:

- Microsoft Access (default)
- MSDE 2000 / SQL Express 2005 / SQL Express 2008 / SQL Express 2012 / SQL Express 2014
- SQL Server 2000 / SQL Server 2005 / SQL Server 2008 / SQL Server 2012 / SQL Server 2014

To achieve optimal performance, a SQL database is strongly recommended for setups using multi-directional Rule types, environments with more than 50 Jobs defined, or environments where hundreds of thousands of files will be processed.

SureSync requires a number of Microsoft components to be installed on the system. The installer will inspect your system for these components and offer to upgrade or install them as needed.

- Microsoft .NET Framework 4.5.2 (Windows 2008/Vista and newer)

- Microsoft .NET Framework 4.0 (Windows 2003/XP)
- Microsoft MDAC 2.8 Refresh with Service Pack 1
- Microsoft Visual C++ Runtime 12.0
- Microsoft Windows Installer 3.1
- Microsoft XML Parser 6.0
- Microsoft Jet 4.0 with Service Pack 8

Contact Information

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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Required Add-Ons for File Locking

In order 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

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.

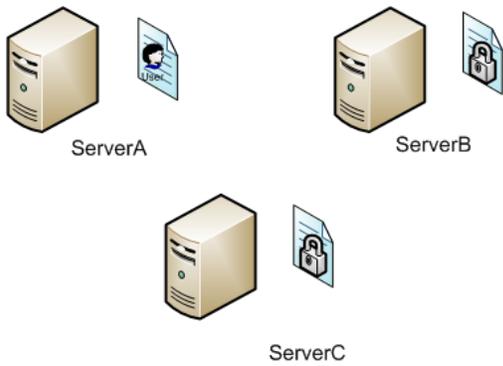
Archiving can be done in real-time to continuously protect data, effectively eliminating tight backup windows during the evening. ArchiveSync will also automatically thin out your archive to clean storage up.

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

What is File Locking?

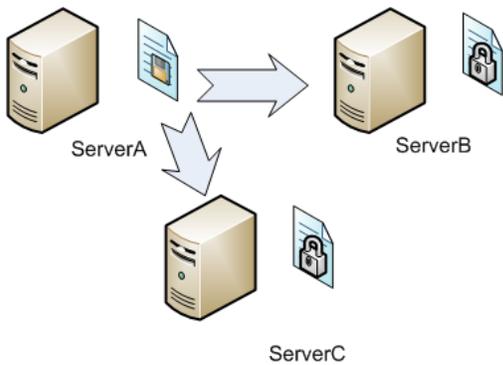
The File Locking Add-On is a powerful enhancement to SureSync that makes it simple to collaboratively share files between multiple offices while ensuring that users cannot make changes to the same files at the same time.

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.

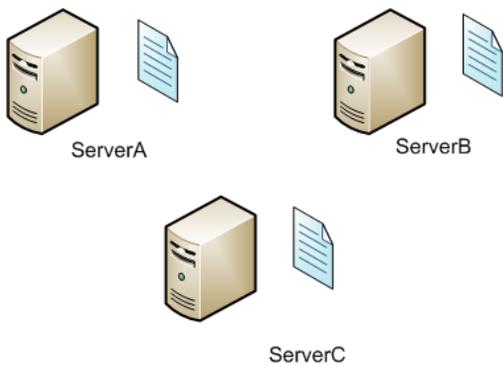


While the file is locked with the File Locking Add-On, no other user can access a write-enabled copy of the file. For example, if a user attempted to open the “Document1.doc” file on “ServerB,” they will open a read-only copy. With the SyncLockStatus Add-on installed on the client, a tray notification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

Generally speaking, 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 due to the fact that 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

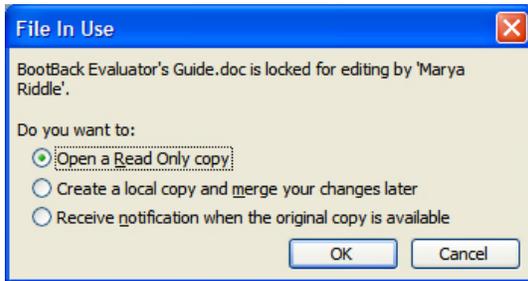
Expected Application Behavior when Encountering Locks

The File Locking Add-On establishes locks on files at the file system level. It does not provide any form of messaging to the user when they encounter a locked file. The behavior that the end user

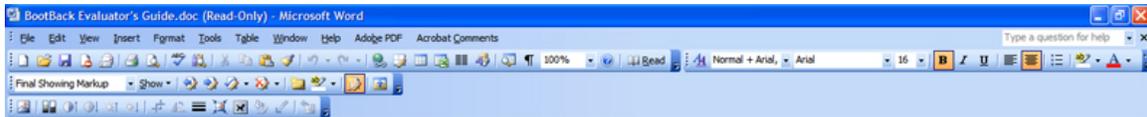
will encounter depends on the applications in use in the environment. When deploying SureSync with the File Locking Add-On, it is essential that you inform the end users about what they can expect to experience when encountering locks. This section will highlight the behavior of some widely used applications while Communications Agent File Locking is active.

Word 2003

When opening a file that is locked in Word 2003, the user will be prompted with the following “File In Use” dialog box. Generally, the user will select “Open a Read Only copy.”



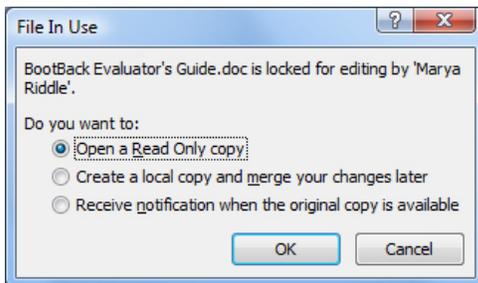
Word will then open a read-only copy of the file as signified by the “[Read-Only]” in the title bar.



Depending on the operating system of the file server, the first “File in Use” screen might not appear. The user may get the Read-Only copy automatically and only see the second screenshot.

Word 2007/2010/2013

When opening a file that is locked in Word 2007/2010/2013, the user will be prompted with the following “File In Use” dialog box. Generally, the user will select “Open a Read Only copy.”



Word will then open a read-only copy of the file as represented by the “[Read-Only]” in the title bar.



Depending on the operating system of the file server, the first “File in Use” screen might not appear. The user may get the Read-Only copy automatically and only see the second screenshot.

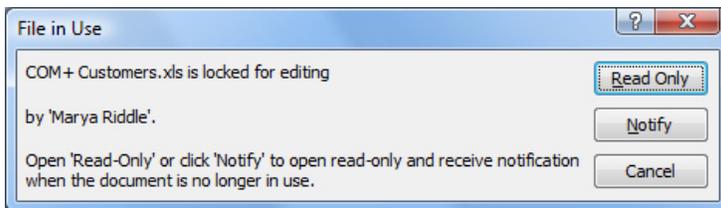
Excel 2003

When a user opens a file in Excel 2003 that is locked, the program will automatically open a read-only copy. This is signified by the “[Read-Only]” in the title bar.

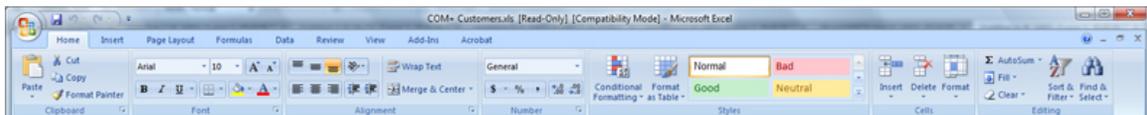


Excel 2007/2010/2013

Excel 2007/2010/2013 will display the following dialog box when opening a file that has been locked. Generally, end users will select “Read-Only,” but they can also choose to be notified when the file becomes available for write access.



Clicking “Read Only” will result in the file being opened and “[Read-Only]” will be displayed in the title bar.



Depending on the operating system of the file server, the first “File in Use” screen might not appear. The user may get the Read-Only copy automatically and only see the second screenshot.

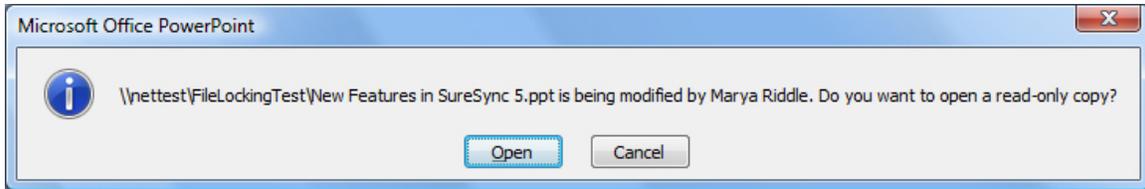
PowerPoint 2003

When a user opens a file in PowerPoint 2003 that is locked, the program will automatically open a read-only copy. This is signified by the “[Read-Only]” in the title bar.



PowerPoint 2007/2010/2013

When a user opens a presentation that is locked with PowerPoint 2007/2010/2013, they will be prompted with the dialog below, and can choose to open a read-only copy or cancel the opening.



If the “Open” button is selected, then PowerPoint will open the file with “[Read-Only]” in the title bar.

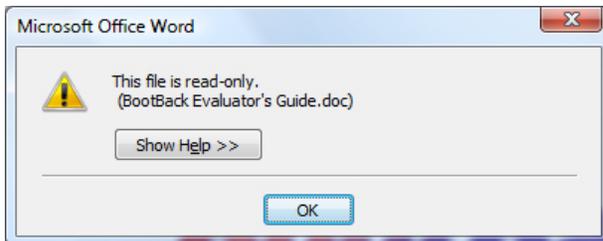


Depending on the operating system of the file server, the first “File in Use” screen might not appear. The user may get the Read-Only copy automatically and only see the second screenshot.

Other Notes

While the File Locking Add-on is running, users may sometimes attempt to save a version of a document over the network version that is locked. This can occur if they save a copy of the file locally, make changes, and then attempt to save them back. This will generate an error because the file is locked and Windows will not allow their version to be saved over the locked version. This is expected behavior but can cause some confusion.

For example, the user might see something like:



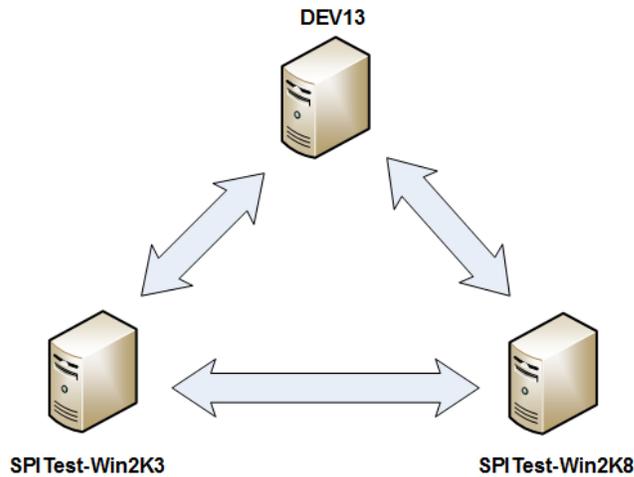
We strongly recommend informing users that this situation can happen. The user should attempt to save the changes again later, as those changes will be allowed when the file has been unlocked.

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 *9PGGCG1-JeffK*, *SPITest-Win2K3*, and *SPITest-Win2K8*. 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.

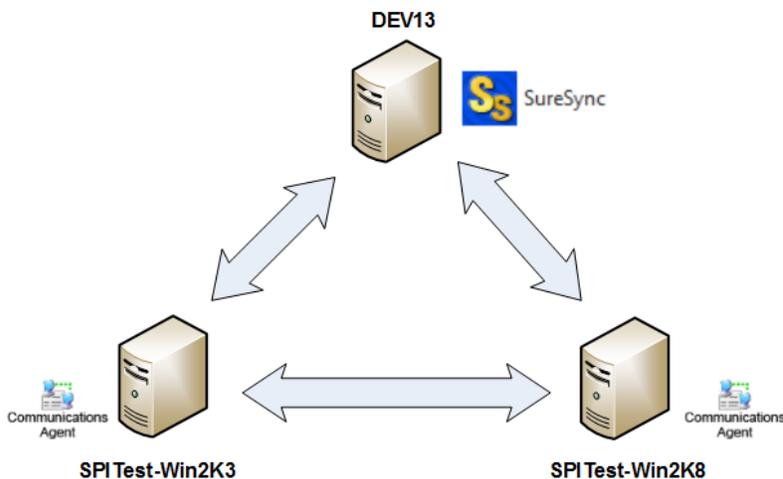
File locking is only available with Real-Time Monitors using multi-directional Rules. File Locking cannot be performed with a Schedule. Communications Agent and File Locking licenses are needed for each machine involved.



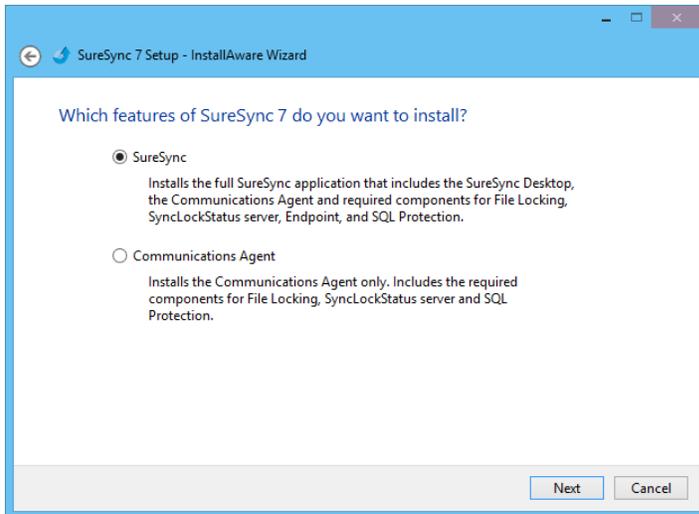
Installation

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 (*DEV13*) and the Communications Agent will be installed on the other two machines (*SPITest-Win2K3* and *SPITest-Win2K8*) as illustrated below. The file locking components are included in both the SureSync and Communications Agent installs



On the *DEV13* machine, we will run *SureSyncSetup.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 *DEV13* as the machine where we configure and run our synchronization job.



On the *SPITest-Win2K3* and *SPITest-Win2K8* machines, the Communications Agent installation should be performed. This is accomplished by launching *SureSyncSetup.exe* on those machines and selecting “Communications Agent” as the installation type. This will install the Communications Agent and the File Locking driver.

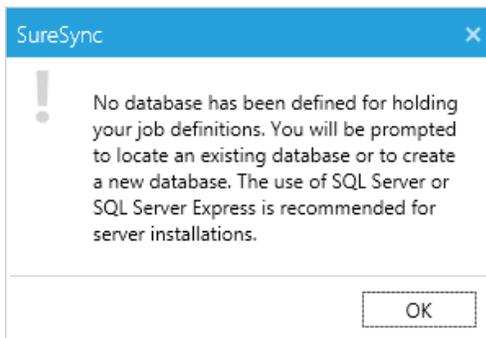
Launch SureSync for the First Time

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 folder and click on the SureSync 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 aide in completing the initial configuration.

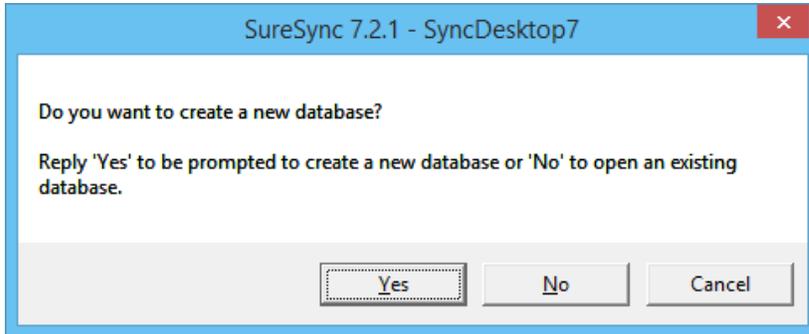
Creating a SureSync Database

The prompt displayed below informs you that a SureSync database needs to be created. The SureSync database is used to store all of your synchronization/replication configuration and related information. This database can be either an Access or SQL database.

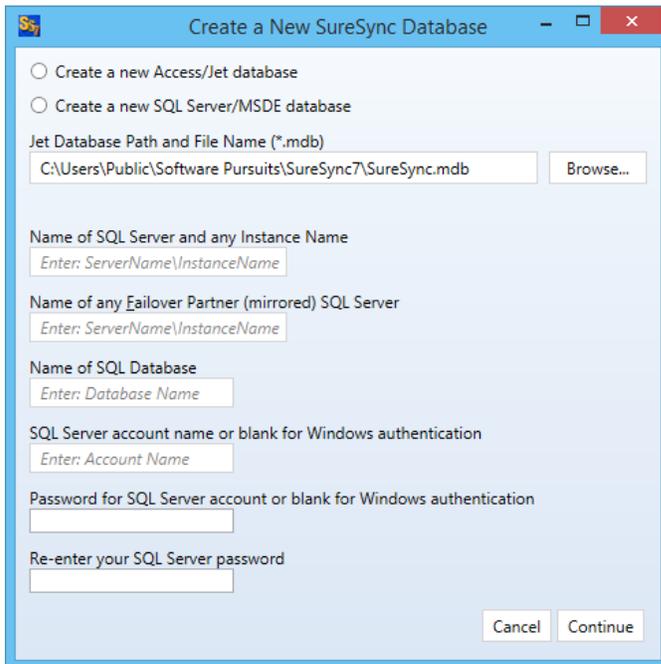


Click “OK” to continue on with the creation of the database.

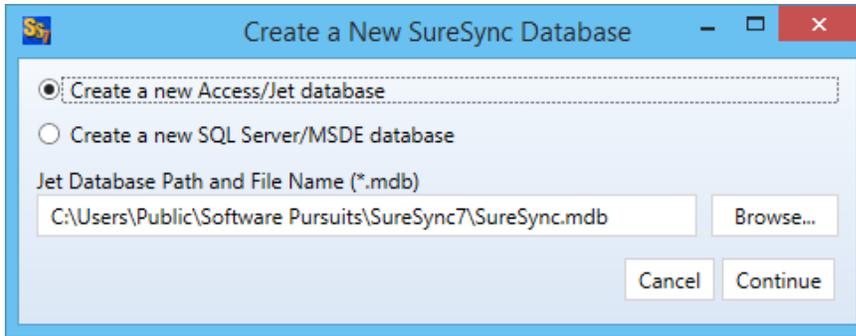
The next dialog box allows you to select an existing SureSync database to open with the new installation or allows the creation of a new database. For our example, this is a new installation and “Yes” should be selected to create a new database.



On the next panel, the type of database is selected. For our example, we will select “Create a new Access/Jet database”.

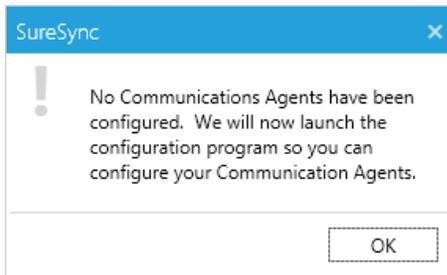


The form will change to show the path to the Access/Jet Database. We will select the default location of C:\Users\Public\Software Pursuits\SureSync7\SureSync.mdb.



Configuring the Local Communications Agent

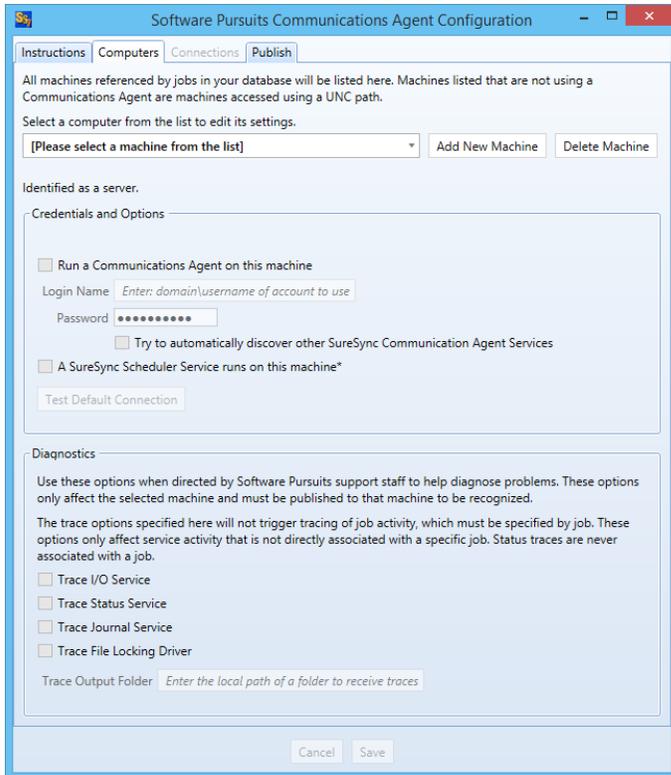
The next step in the initial configuration involves defining a credential for the local Communications Agent to run under.



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.

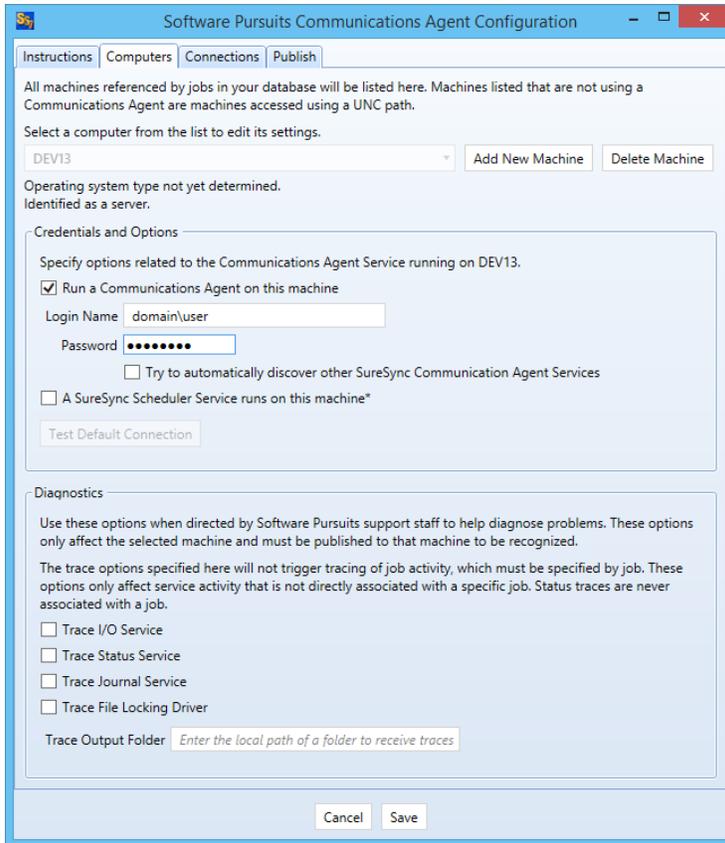
The only exception to the need to configure the local agent is if no paths of any kind, including UNC paths are referenced from the local machine. This scenario is extremely rare.



When the Communications Agent Configuration panel loads, click on the “Computers” tab. From the “[Please select a machine from this list]” dialog, select your local machine. In this case, the machine is “DEV13”.

Check the “Run a Communications Agent on this machine” option and enter your credential in the “Login Name” and “Password” fields. The “Login Name” field should be in the format of domain\user or machinename\user. Click the “Save” button to save the credential.

When a Communications Agent configuration is saved, a default connection for TCP port 9033 is created automatically. In most environments, only the default connection is used.



If you want to test the configuration, click the “Test TCP Connection” button. Click the red X on the upper right hand corner of the Software Pursuits Communications Agent Configuration panel when done to close the panel and move on with the configuration process.

Importing a License

The SureSync installer does not contain a license file. To enable functionality, you must import a trial license or your purchased license obtained from Software Pursuits.

If you are new to SureSync, you should request a trial license from http://www.softwarepursuits.com/suresync/download_trial.asp. 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.

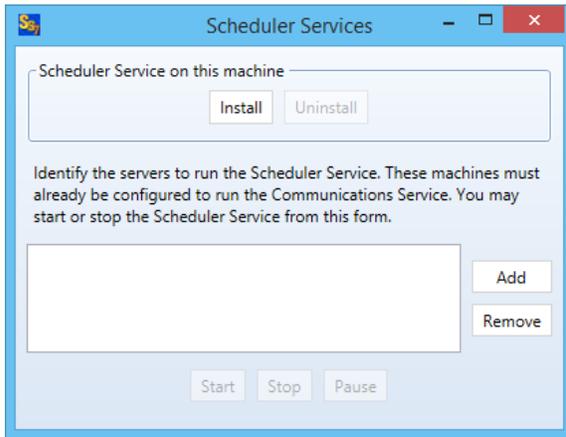


Once a license file has been provided to you, click the “Licenses” button () in the ribbon bar of the SureSync Desktop and click the “Import License...” button to import the updated file.

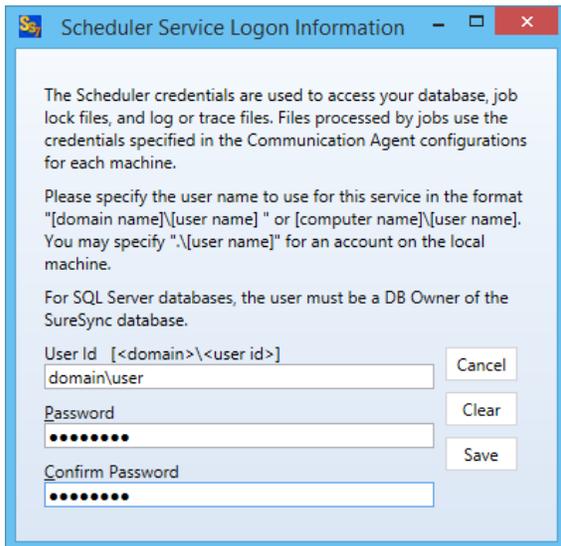
Installing the SureSync Scheduler

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 in order 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.”



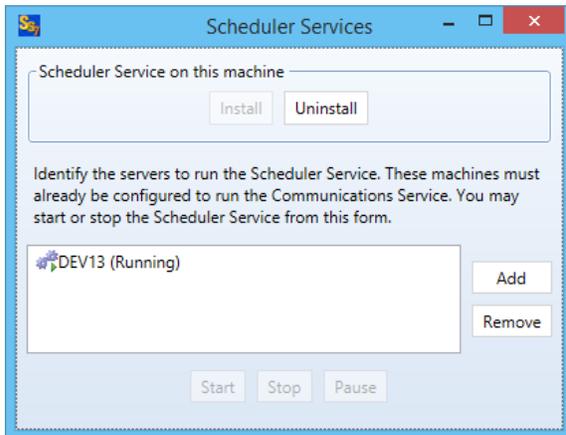
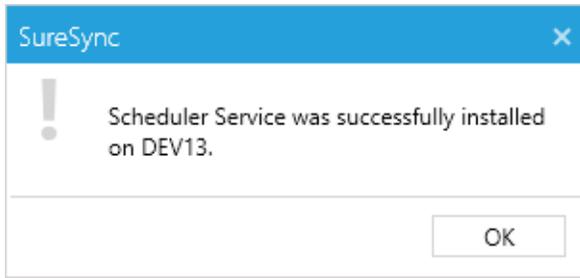
To install the Scheduler, click the “Install” button, which will launch a window like the one below.



The user account the Scheduler service runs under must be a member of the local administrators group on the SureSync machine. If using SQL, the account must also be a DBOwner on the SureSync database.

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

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

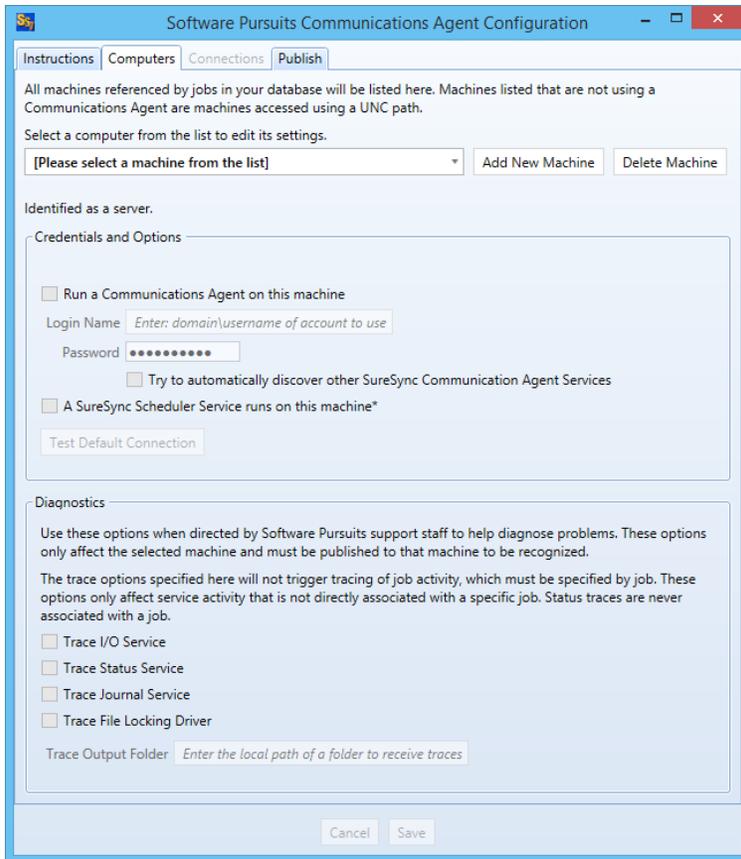


Once the service has been installed, click on the machine name and click “Start.” The Scheduler will now be listed as Machine Name (Running).

Configuring the Communications Agent Machines

The next step in the configuration is to define the remote Communications Agent machines in SureSync. To do this, launch SureSync, click on the “Home” button, click “Communications Agent” and click the “Configure Communications Agents” button.

Once the Communications Agent Configuration panel loads, click on the “Computers” tab.



Select the Communications Agent from the drop-down menu to begin configuring it. If the machine you want to configure does not appear in the list, you may enter a name for it by clicking the “Add New Machine” button.

The machine name listed in the "Select a computer from this list to edit its settings" drop-drop menu must be the actual machine name for the machine you're trying to connect to. Using an IP address or a random name in the drop-drop menu will result in the test failing.

You will then want to:

1. Check the box that says "Run a Communications Agent on this machine."
2. Enter a username with adequate permissions to that machine in the “Login Name” field. We recommend a domain administrator account. Be sure to configure the account as domain\user. If you wish to use a local account on that computer, it can be formatted as machinename\user.
3. Enter the password for the account in the "Password" field.
4. Click the “Save” button. When a Communications Agent configuration is saved, a default connection for TCP port 9033 is created automatically. In most environments, only the default connection is used.
5. If you want to test the configuration, click the “Test TCP Connection” button.

These steps should be done for each remote Communications Agent that will be used. In the example scenario, *SPITEST-WIN2K3* and *SPITEST-WIN2K8* would be defined. An example of a completed Communications Agent configuration is shown in the screenshot below.

Creating the Job

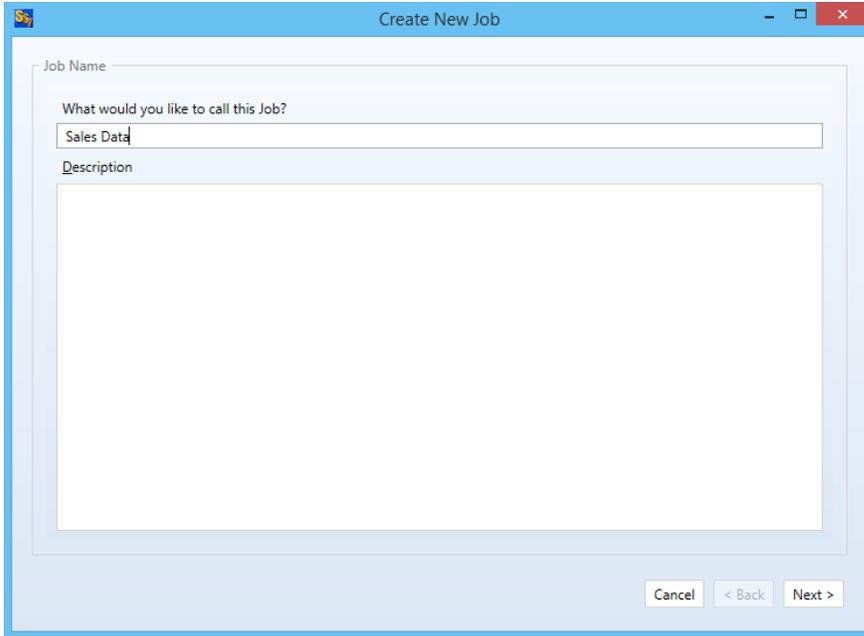
Jobs are the basic building blocks of SureSync. Each Job contains the root paths (source and destination paths) that apply to that Job and options for the Job. Each Job also contains one or more Rules that tell SureSync how to replicate/synchronize data. The Job and the Rule are created together in one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

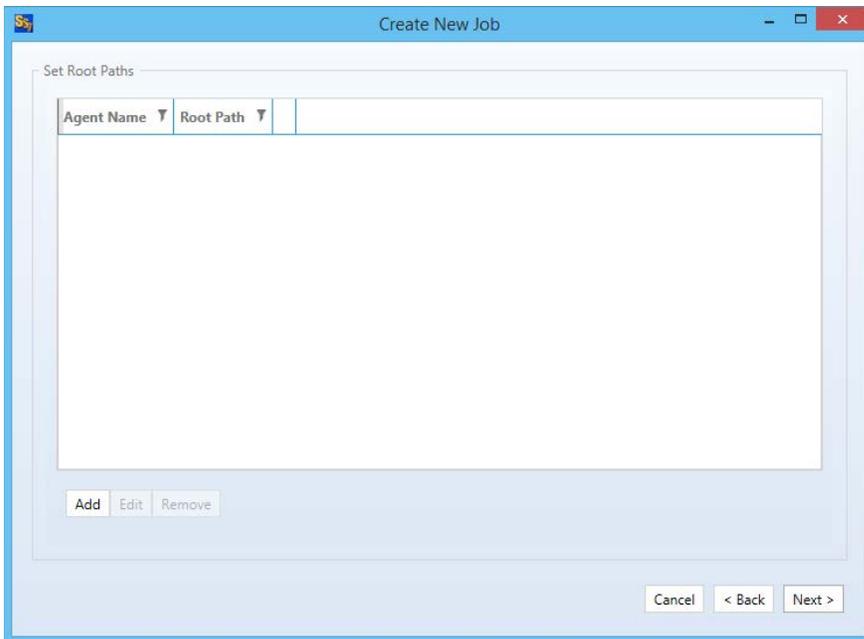


The first panel in the wizard allows you to name your Job. Enter the name of the Job and an optional description and click “Next” to continue. The Job name used for this example will be “Sales Data”.

Specifying Root Paths

The next panel is used to specify the paths that you want to synchronize. All of 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.”

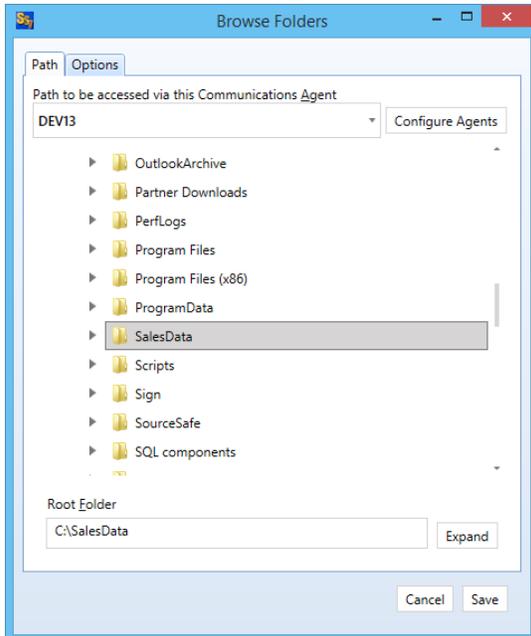


Root paths are added by clicking the “Add” button at the bottom of the panel to display the “Select a new root path” panel shown below.

For this example, our root paths are:

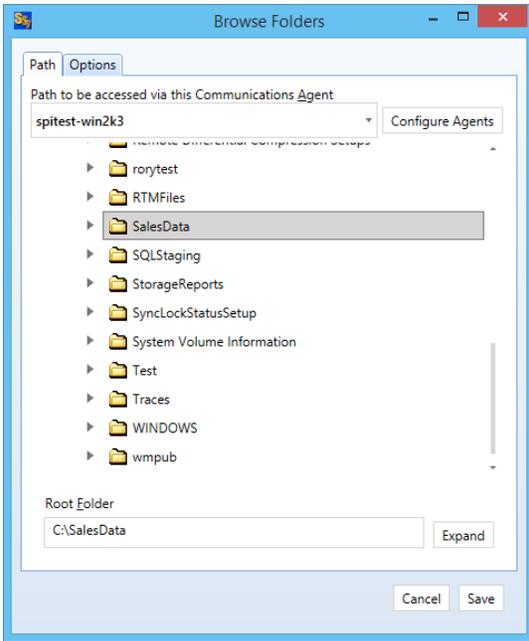
- C:\SalesData on DEV13
- C:\SalesData on SPITEST-WIN2K3
- C:\SalesData on SPITEST-WIN2K8

First, we will select the local path on DEV13 by selecting DEV13 from the “Path to be accessed via this Communications Agent” drop-down and then browsing for the C:\SalesData path.

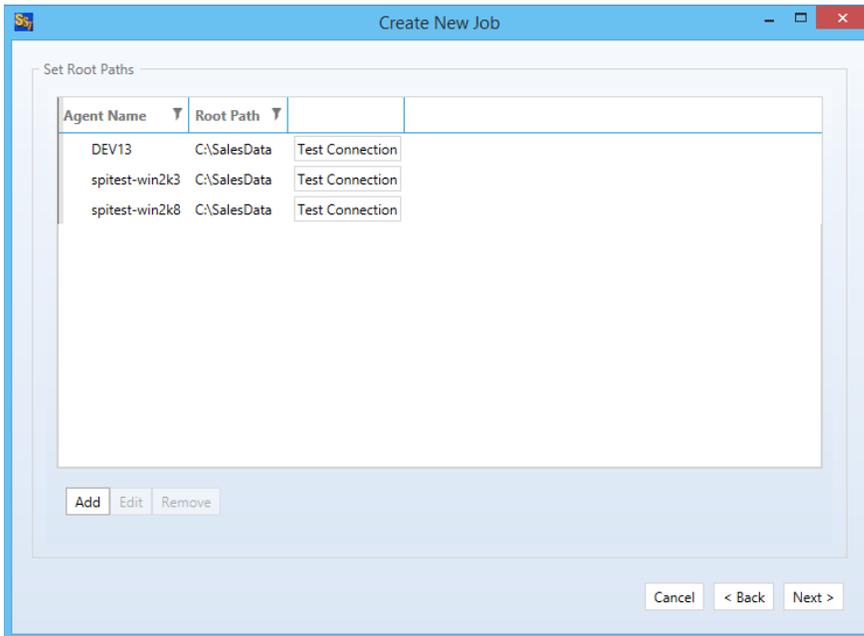


Once that path has been added, we must add the paths for the remote machines. Click the “Add” button again to add a new path. Then you will select the machine name from the “Path will be accessed via this Communications Agent” drop-down menu, browse to the path, and then click “OK.”

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

Determining the Best Rule

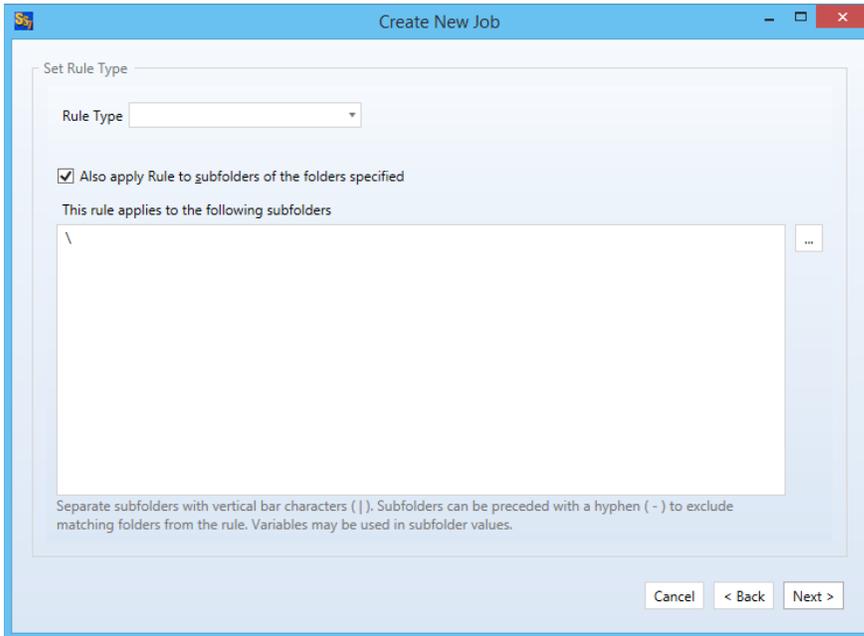
SureSync offers a number of different replication & synchronization methods, allowing a great deal of flexibility in how your data is handled. A chart detailing each of these Rules can be found in the help file under “Rule Methods Summary.”

Selecting Your Rule & Defining Folder Exclusions

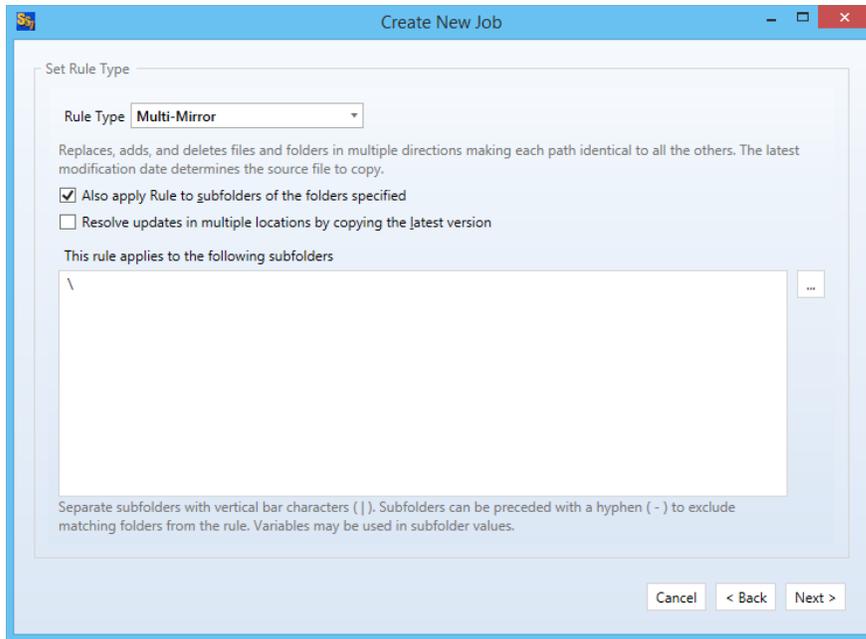
On this next panel we will specify the Rule to use for this job.

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 cancel the wizard, delete the partially created Job, and launch the Job wizard again. Be sure to define both source and destination paths on the Root Paths panel to enable all Rules.

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.

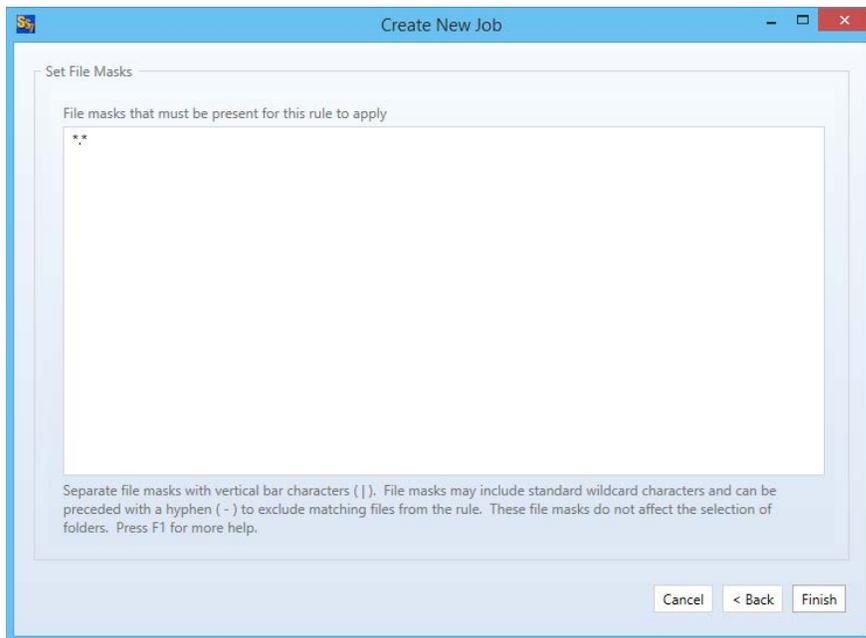
To learn more about how to include and exclude subfolders, press the “F1” key on this panel.

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.

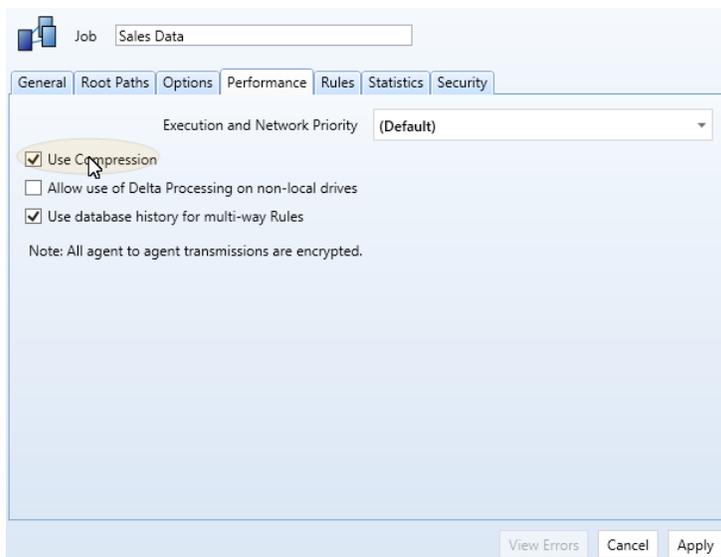
The second option is called a Trial Run. This method produces a tab delimited file containing the actions that would be performed. This file can easily be opened in Microsoft Excel to be viewed. To run a Trial Run, right click on the Job and select "Trial Run." Further details about Trial Run are available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

Communications Agent Compression & Encryption

The Communications Agent Add-On provides the ability to compress data during transmission. These features are useful when processing data over slow connections or public networks such as the Internet. For example, compression is recommended to be enabled when synchronizing files over 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 components 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

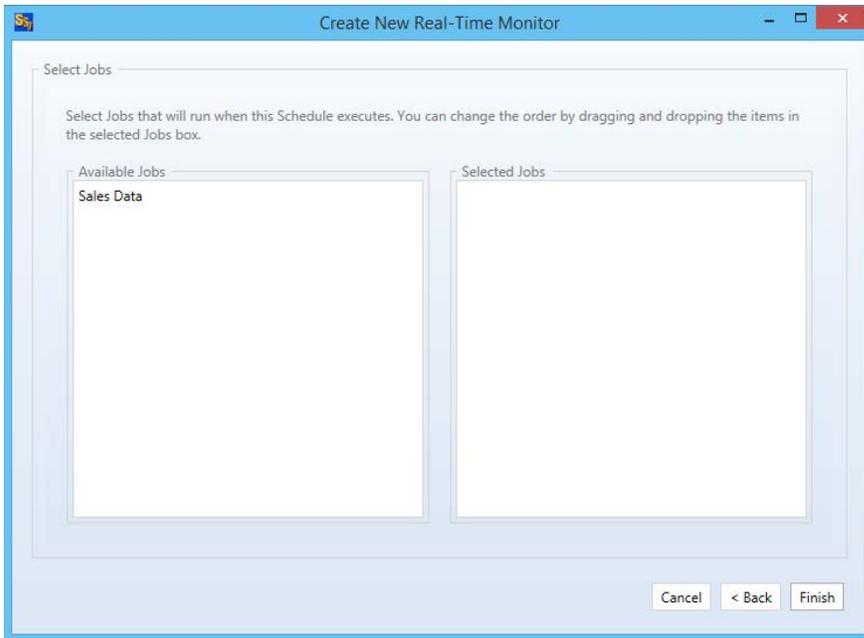
A screenshot of a software window titled "Create New Real-Time Monitor". The window has a light blue header and a white main area. At the top, it says "Real-Time Monitor Name". Below that, it asks "What would you like to call this Real-Time Monitor?" with a text input field containing "Sales Data". Underneath is a "Description" label and a large empty text area. At the bottom left, there is 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.

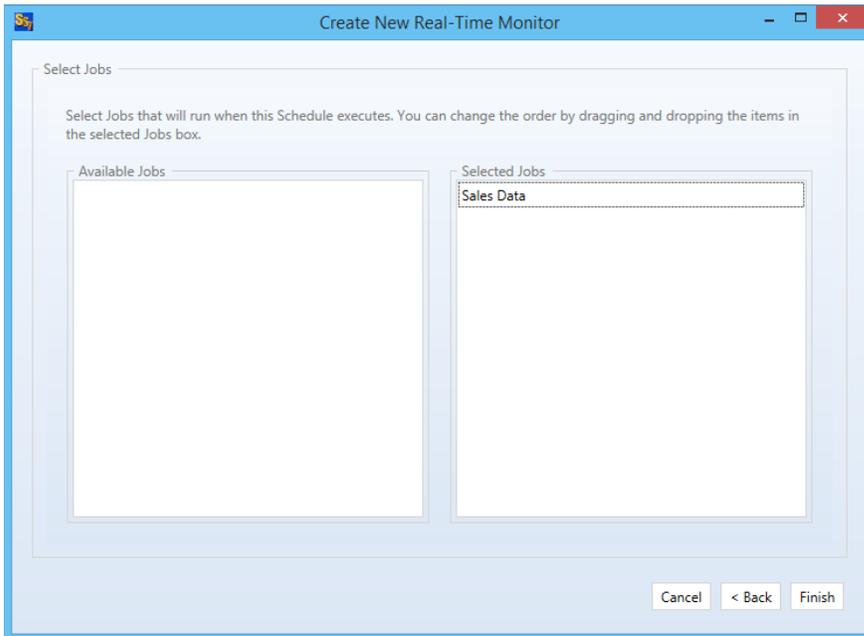
Selecting What Job(s) to Run

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.



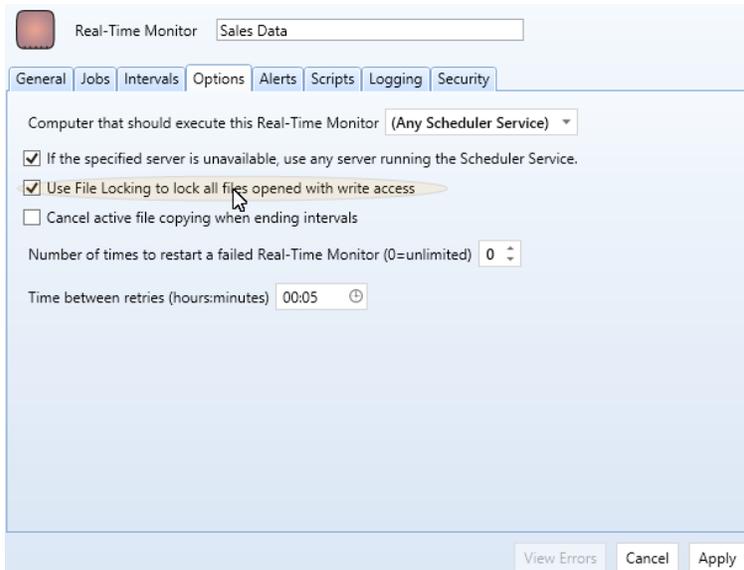
For our example, drag and drop the “Sales Data” Job into the “Selected Jobs” column. The panel should now look like this:



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.

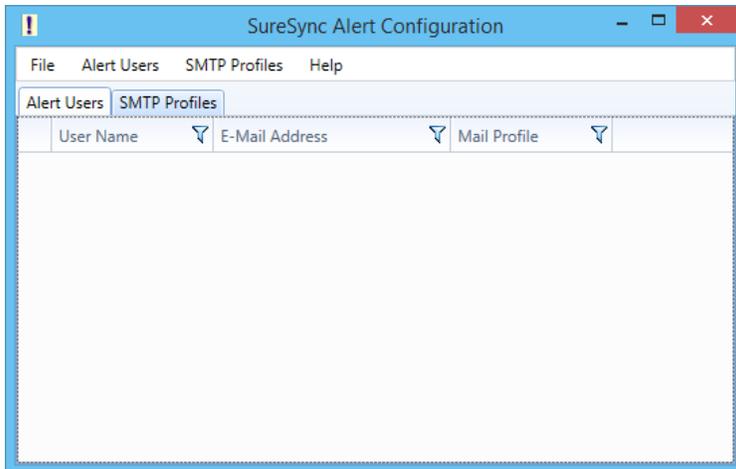
Configuring E-mail Alerts

E-mail alerts 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 alerts, you must launch the SureSync Alerts Configuration utility and create a SMTP profile. The SMTP profile provides SureSync with the necessary details about your SMTP e-mail server so the program can send messages to you.

To launch the SureSync Alerts Configuration utility, open SureSync, click on the “Home” button and click on “Alert User List”



To create a SMTP Profile, go to the SMTP Profiles menu and select “New SMTP Profile”

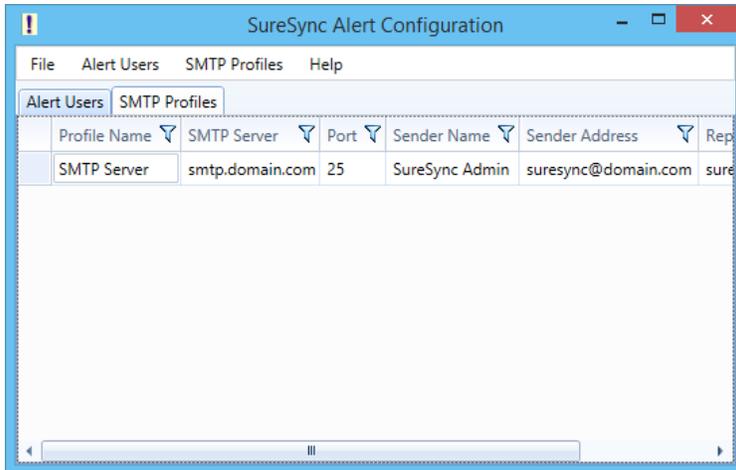
The “Add SMTP Profile” panel allows you to define the SMTP settings for your mail server. The following fields must be configured:

- **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). The following fields can optionally be configured:

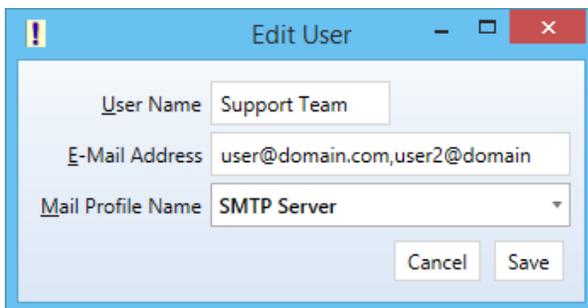
- **User Name:** The username that SureSync will log into this SMTP server with when sending an e-mail alert.
- **Password:** The password for the username defined in "User Name" should be entered here.
- **Confirm Password:** The password for the username defined in "User Name" should be confirmed here.

Click "Save" to create the SMTP Profile. Clicking on the SMTP Profile tab of the SureSync Alert Configuration utility will show the new profile.



Configuring an Alert User

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



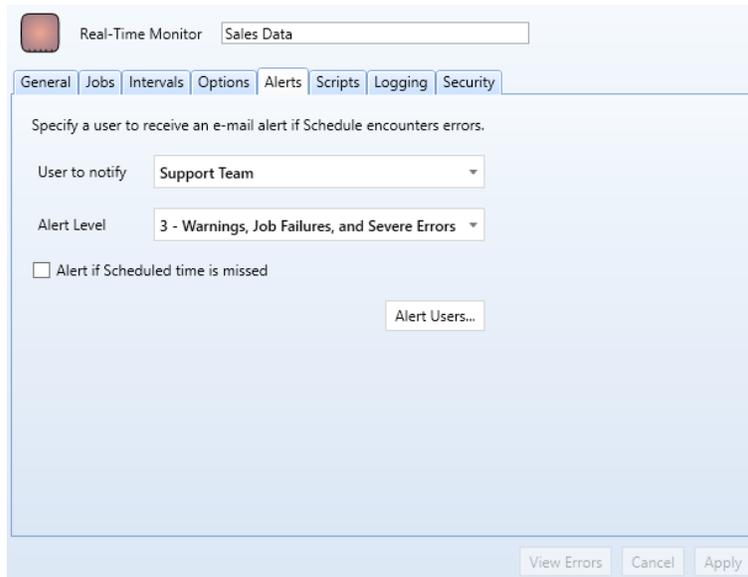
The "Add User to Alert" field has the following fields to be configured:

- **User Name:** The username that will be used in SureSync to represent this e-mail address.
- **E-mail Address:** The e-mail address that SureSync will send the alert messages to.
- **Mail Profile Name:** 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 of the alerts configuration is to tell the Schedule to use the Alert User, and at what level of errors to send alerts. This is accomplished by clicking on the Schedule in the SureSync desktop, clicking on the Alerts tab, selecting the Alert User from the drop-down menu and then clicking “Apply.”



Additional details about the E-mail Alert levels available can be found by pressing “F1” while on the Alerts tab.

Monitoring the Synchronization

Monitoring your synchronization job is important, and SureSync makes this process easy through the use of two different status panels.

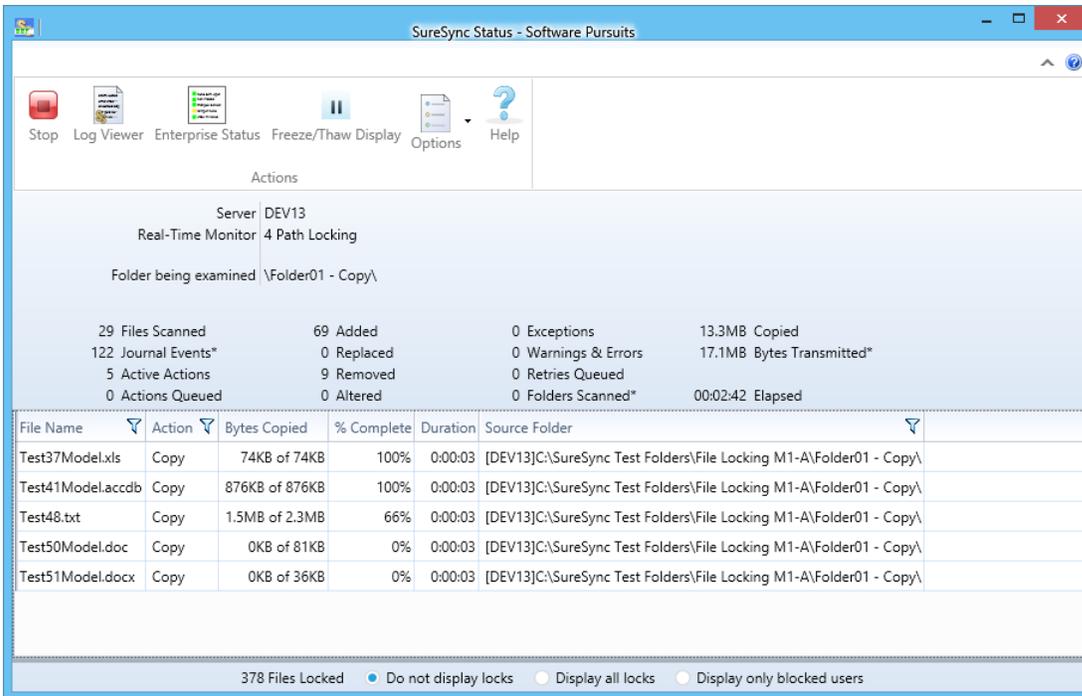
Detailed Status

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.



Enterprise Status

The Enterprise Status panel can be used to view the current 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 7 and then “SureSync Enterprise Status.”



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

