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1. Set up a Job

BASIC CONFIGURATION

A **JOB** is a Source/Target Combination with all the necessary settings for the desired synchronization.

A major advantage of using our PeerSync product is the ability to create multiple Jobs and specify individual settings and running modes. (i.e. You can have one Job running in real time and one on a schedule etc.)

- 1.1 **Add a new Job** by clicking on the **Add New Job** from the main PeerSync interface button on the lower portion of the right pane. You may also right click in the top right pane of the main interface and select **Add** then **Job with Defaults**, or select **Add** then **Job with Wizard** if you wish to follow the onscreen instructions provided by the Wizard.
- 1.2 **Rename the Job** by double clicking on the Job name and typing in the desired name.
- 1.3 **Select your Source/Target Job Combination** by selecting the **Folder Selection** window from the left menu tree.
You may use VPN (Virtual Private Network), UNC (Universal Naming Convention) paths or local directory paths.

SOURCE FOLDER: This is the folder/directory where the files you wish to replicate/synchronized are stored.

TARGET FOLDER: This is the folder/directory on your secondary drive where your files will be copied to (*OR SYNCHRONIZED*).

PLEASE NOTE: *In the Workstation edition, one of the above (either the Source or the Target) is required to a local directory. In the Server and High Volume Server, both the Source and the Target can be Remote Directories.*

a) From your main interface, click on **Folder Selection** in the left tree menu.

b) In the **Folder Selection** pane, select the *Source Folder* by clicking on the **Open** button and browsing through the directories, or by simply inputting the UNC path.

To use FTP for the *Source Folder*, select **Advanced** from the drop down menu located above the Selection Tree. Click on the **FTP Selection** item on the tree menu and check the option **Use FTP for Source**. You may then fill in the necessary FTP information.

c) Now select the Target Folder by clicking on the **Open** button and browsing through the directories or by including the Target's UNC path or Network drive.

1.4 **Creating Multiple Jobs**

PeerSync gives you the ability of creating Multiple Jobs with different setting all included in one Profile. This means that if you have different Jobs to run at different times from different Sources to different Targets, you add the respective Job with the specific settings needed.

- To add a second Job, simply follow instructions 1.1 to 1.3 from above

1.5 Selection Tree

The Job settings (such as Folder Selection, Automation, File Options, Exceptions, Reporting and more) can be specified by clicking in the Selection Tree on the left side of the user interface.

You can open the menu in Basic, Intermediate, Advanced or Customized view.

To specify the individual Job settings:

- Click on the specific Job you wish to customize, by selecting it in the top right window pane
- Now click on the specific **Job Settings** desired
- Modify the settings appearing on the bottom right window pane

1.6 Saving your Profile

Once you have added all your Jobs (Source/Target Combination), and customized the settings to perform your synchronization, save your Profile simply by going to **File** then **Save** or **Save As**.

1.7 Launching your Profile

After having saved your Profile, you may launch your Profile to start the synchronization by clicking on **Run/View Current Profile** on the selection tree and clicking on the **Launch Current Profile** button.

(For a more specific explanation on the different Running Modes go to HOW TOs 7.1 and 7.2)

2. Setup a Synchronization Mode

2.1 Setup Real-Time Synchronization

Use this synchronization mode for Real-Time Synchronization* on files from a single server/machine to a second server/machine for purposes of backup, data availability, or load balancing.

*Synchronization: files that have been updated or added will be added and/or updated on the Target directory.

The PeerSync application should be installed on the Source server. The Source server will be the server where data is modified by users, applications, etc.

- a) Start **PeerSync Profiler**.
- b) Click on the **Job** menu on the Menu bar and choose **Add** then **Job with Defaults**.
- c) Change the drop-down list in the top left from **Basic** to **Advanced**.
- d) In the **Folder Selection** window, enter the local drive path that needs to be replicated in the **Select Source Folder** field. Enter the UNC path or mapped drive letter for the destination of the replicated data in the **Select Target Folder** field.
- e) In the **File Options** window, check the options **Add-synchronize new files** and **Update-synchronize existing files**. If you would like file and folder deletion events to be replicated to the second server, check the option **Replicate-Delete unmatched files***.

Check the Archive Deletions section 2.6 below for more information on deletion features.

- f) In the **Automation** window, check the option **use real-time monitoring**. Click on the **Real-Time Options ...** button and check the option **Use enhanced real-time monitoring (File Level Change Detection)**. This will ensure Real-Time events are monitored and processed.
- g) **(Optional)** In the **StartUp/Services** window, choose the desired startup method. In order to setup PeerSync to run unattended as a service, choose **Install as an NT Service**.

Note: *If running as a service, make sure the service is using a non-local system account, such as domain admin or any other account that has access to the replicated directories.*

- h) Save the Profile by going to the **File** menu and choosing **Save** or **Save As**.
- i) Run PeerSync by going to the **Run/View Current Profile**.

*Replication: Files that have been updated, added and/or deleted will be added, updated and/or deleted on the Target directory. (Same as synchronization with deletions)

2.2 **Setup Scheduled Synchronization**

- a) Start **PeerSync Profiler**.
- b) Click on the **Job** menu on the Menu bar and choose **Add** then **Job with Defaults**.
- c) Change the drop-down list in the top left from **Basic** to **Advanced**.
- d) In the **Folder Selection** window, enter the local drive path that needs to be synchronized in the **Select Source Folder** field. Enter the UNC path or mapped drive letter for the destination of the replicated data in the **Select Target Folder** field.
- e) In the **File Options** window, check the options **Add-synchronize new files** and **Update-synchronize existing files**. If you would like file and folder deletion events to be replicated to the second server, check the option **Replicate-Delete unmatched files**.

Check the Archive Deletions Section 2.6 below for more information on deletion features.

- f) In the **Automation** window, under the **Scanning Options** section, you will be able to schedule the synchronization to **Scan Job every x minute(s)** or setting up a daily timer schedule by selecting **Scan Job at x**.
- g) To **scan job every x minutes** check this option and fill in the number of interval minutes.
- h) To setup a daily timer schedule, check **Scan Job at x**. The **Additional Options** window will now pop up. Select **New** and then check the days and times of the week you wish to run the synchronization. The **Selection Options** feature in the bottom left corner will give you options to run the selected daily timer schedule in a **Recurring** mode (run every time) or **Run**

Once (run one time only). Choose **OK** when you have completed the scheduling setup.

- i) **(Optional)** In the **StartUp/Service** window, choose the desired startup method. In order to setup PeerSync to run unattended as a service, choose **Install as an NT Service**.

Note: *If running as a service, make sure the service is using a non-local system account, such as domain admin or any other account that has access to the replicated directories.*

- j) Save the Profile by going to the **File** menu and choosing **Save** or **Save As**.
- k) Run PeerSync by going to the **Run/View Current Profile**.

2.3 **Setup Scheduled Bi-Directional Synchronization**

Use this mode if you wish to run Scheduled Bi-Directional Synchronization of servers or workstations in which data modified on either machine is replicated on interval or schedule to the other machine.

The PeerSync application should be installed on the Source server. The Source server will be the server where data is modified by users, applications, etc.

- a) Start **PeerSync Profiler**.
- b) Click on the **Job** menu on the Menu bar and choose **Add** then **Job with Defaults**.
- c) Change the drop-down list in the top left from **Basic** to **Advanced**.
- d) In the **Folder Selection** window, enter the local drive path that needs to be synchronized in the **Select Source Folder** field. Enter the UNC path or mapped drive letter for the destination of the replicated data in the **Select Target Folder** field.
- e) In the **File Options** window, check the options **Add-synchronize new files** and **Update-synchronize existing files**. If you would like file and folder deletion events to be replicated to the second server, check the option **Replicate-Delete unmatched files**.

Check the Archive Deletions section 2.6 below for more information on deletion features.

- f) In the **Automation** window, under the **Scanning Options** section you will be able to schedule the synchronization to **Scan Job every x minutes** or setting up a daily timer schedule by selecting **Scan Job at x**.
- g) To **scan job every x minutes** check this option and fill in the number of interval minutes.
- h) To setup a daily timer schedule check **Scan Job at x**. The **Additional Options** window will now pop up. Select **New** and then check the days and times of the week you wish to run the synchronization. The **Selection Options** feature in the bottom left corner will give you options to run the selected daily timer schedule in a **Recurring** mode (run every time), or **Run Once** (run one time only). Choose **OK** when you have completed the scheduling setup.
- i) In the **File Options** window, check **Bi-directional (both directions)**. Click **OK** to the pop up message box.
- j) Now click on the **Global Settings** link and check **Use enhanced bi-directional synchronization mode options**.
- k) **(Optional)** In the **StartUp/Service** window, choose the desired startup method. In order to setup PeerSync to run unattended as a service, choose **Install as an NT Service**.

Note: If running as a service, make sure the service is using a non-local system account, such as domain admin or any other account that has access to the replicated directories.
- l) Save the Profile by going to the **File** menu and choosing **Save** or **Save As**.
- m) Run PeerSync by going to the **Run/View Current Profile**.

2.4 **Setup Real-Time Bi-Directional Synchronization**

Use this mode if you wish to run Real-Time Bi-Directional Synchronization of servers or workstations in which data modified on either machine is replicated in Real-Time to the other machine.

Two full licenses of PeerSync are required.

The PeerSync application should be installed on both servers involved in the Bi-Directional Synchronization.

- a) Start **PeerSync Profiler**.

- b) Click on the **Job** menu on the Menu bar and choose **Add** then **Job with Defaults**.
- c) Change the drop-down list in the top left from **Basic** to **Advanced**.
- d) In the **Folder Selection** window, enter the local drive path that needs to be synchronized in the **Select Source Folder** field. Enter the UNC path or mapped drive letter for the destination of the replicated data in the **Select Target Folder** field.
- e) In the **File Options** window, check the options **Add-synchronize new files** and **Update-synchronize existing files**. If you would like file and folder Deletion Events to be replicated to the second server, check the option **Replicate-Delete unmatched files**.

Check the Archive Deletions section 2.6 below for more information on deletion features.

- f) In the **Automation** window, check the option **Use real-time monitoring**. Click on the **Real-Time Options ...** button and check the option **Use enhanced real-time monitoring (File Level Change Detection)**. This will ensure Real-Time events are monitored and processed.
- g) In the **File Options** window, check **Bi-directional (both directions)**.
- h) Now click on **Global Settings** and check **Always create a super-set during bi-directional synchronization**.
- i) In the **Miscellaneous** window, select **Use intermediate file during** copy.
- j) **(Optional)** In the **StartUp/Service** window, choose the desired startup method. In order to setup PeerSync to run unattended as a service, choose **Install as an NT Service**.

Note: *If running as a service, make sure the service is using a non-local system account, such as domain admin or any other account that has access to the replicated directories.*

- k) Save the Profile by going to the **File** menu and choosing **Save** or **Save As**.
- l) Run PeerSync by going to the **Run/View Current Profile**.

2.5 **Activate Deletions**

If you would like file and folder deletion events to be replicated to the second server, check the option **Replicate – Delete unmatched files** in the **File Options** window.

2.6 Archive Deletions

- a) If **Replicate – Delete unmatched files** is enabled, we recommend clicking on the **Move Options...** button and selecting a folder or Recycling Bin to archive deleted files in – otherwise files will be permanently deleted from the system.
- b) Simply check the option **Move deleted files to an alternate location**, click on the **Move Options...** button and browse for the desired folder where you wish to archive the deleted files/folders.

3. Synchronize Open and Locked Files

3.1 Include Open Files

PeerSync has an Include Open Files option. This option will try to access files that are in use by another application as long as they are not locked. If the files are locked, such as database files, you will need to enable the Embedded Open File Manager (EOFM) feature. *This option is an added feature of the PeerSync product.*

- a) To enable the Include Open Files option (which allows copy of non locked files), select the **Open Files** pane from the left menu tree.
- b) In this pane make sure the **Include all open files (files that are open for read or write access)** option is checked.
- c) If you have locked files such as database files you will need the **Embedded Open File Manager (EOFM)** feature.

3.2 What is Embedded Open File Manager (EOFM)

- a) EOFM can be added to PeerSync.
- b) By itself, PeerSync copies open and non-locked files such as MS Word, Excel, picture files, drawing files etc. With the addition of the EOFM option, PeerSync can copy opened and locked files such as data base files, Outlook .pst files, etc.

- c) EOFM can only run on MS Windows XP Home/Professional or NT Workstation.

What the EOFM option can do for you:

- a) Open locked Source Files for complete backup to selected Target Folders.
- b) Allow files used by MS Outlook (.pst) to be backed up while Outlook is in use.
- c) Allow QuickBooks, or Quicken files to be backed up in the background without the user intervening.
- d) Allow any active database files to be backed up automatically without disrupting normal operations.

What EOFM will NOT do for you?

- a) EOFM cannot overwrite Target Files that are opened or in use.
- b) EOFM will not merge changes from one database to another.
- c) EOFM will not merge record changes between different MS Outlook sessions.

Note: *Changes requiring EOFM for access will be queued to run on a 30minute interval when PeerSync is in Real-Time Mode.*

4. Carry over File/Folder Security – Setup the Security Transfer

You may want to activate this feature if you wish to transfer file/folder security.

- a) In the **Miscellaneous** window check the **Transfer NT security descriptions (ACL's)** option.
- b) Save your Profile by going to the **File** menu and choosing **Save** or **Save As**.
- c) Stop and restart your Profile by going to the **Run/View Current Profile** window.

5. Specify Exceptions – Set Files/Folders Exceptions

5.1 Set Files/Folders Exceptions

If you have files/folders that you wish to exclude from the synchronization follow the steps below.

To exclude a file name or type:

In the **Exceptions** window type in the file name or extension that you wish to exclude from the synchronization. If you would like to exclude more than one file name/extension, separate them by a semi colon.

To exclude a folder simply click on the  button to the right of the **Exclude Folders** text box. Within this **Exceptions** window you may check the **Exclude empty Source Folders** option if you wish not to sync empty Source Folders to the Target.

To exclude files based on their size, fill in the **Greater than: x bytes** or **Less than: x bytes** fields.

5.2 Set files/folders to include

If you would like to synchronize only specific files and exclude all the others follow the instructions below.

To specify the file name(s) or type(s) to include:

If you wish to include only files of a specific date or date range click on the  button in the **Selected File Dates** field and specify your date range settings.

In the **Exceptions** window type in the **Include Files** any file name or extension that you wish to include in the synchronization. Make sure if you would like to include more than one file name/extension separate them by a semi colon.

6. Specify Reporting Options

PeerSync offers the following reporting options: Log file, Administrative Report Files, E-mail Messages, and SNMP Report options.

Log File: the log file will give you information on the specific files that were added or deleted.

Administrative Report File: with this reporting option you will be able to create administrative reports containing summary information, standard report file content or errors only.

Simply select the **Admin Reporting** window and click on the check box to the right of **Create Administrative Report Files** and specify your reporting settings.

E-mail Messages: with this reporting option you will be able to create administrative e-mail reports containing summary information, standard report file content, or errors only.

SNMP report: (Simple Network Management Protocol) this will send any error information to your company's management tool.

7. Specify Application's Running Modes

7.1 Set Up PeerSync to run as a Service

Running PeerSync as a Service will ensure your Profile is enabled even when you log off your machine. To set up PeerSync to run as a Service follow the steps below:

- a) Select the **StartUp/Service** window from your left menu tree.
- b) Click on **Install as an NT Service**.
- c) An information window will open. Click on **Show Services**.
- d) In this **Services** window select **PeerSync Professional Series Software**.
- e) Double click on it.
- f) Select the **Log On** tab and input the user log on information. *(Make sure this is a non-local account, with necessary access to the Source and Target directories)*
- g) Now click the **OK** button on the **Service Information** window.
- h) You may **Start Stop, Pause, and Resume** the Service in the **Run/View Current Profile** activity window.

7.2 Run PeerSync as an Application

This is the default running mode for the PeerSync product. To set up PeerSync to run as an Application follow the steps below:

- i) Click on the **Disable All Startup Options** in the **Run/View Current Profile** window.

7.3 Run an initial scan at startup

This will ensure that your data is fully synchronized prior to running into Real-Time or scheduled mode. To set up your initial scan at startup:

- a) Select the **Automation** window from your left menu tree.
- b) Select **Scan Job once at start** (this will enable initial execution scan for all the Jobs in your Profile).
- c) Repeat steps a) and b) for each Job you wish to have an initial scan for.

If you wish to suppress the initial execution for one or more of the Jobs in the Profile:

- a) Select the specific Job by clicking on it.
- b) Go to the **Automation** window from your left menu tree.
- c) Uncheck **Scan Job once at start**.
- d) Repeat steps a) and b) for each Job you wish to suppress the initial scan for.

8. Run Synchronization

To run the Synchronization simply:

- a) Go to the **Run/View Current Profile** window from your left menu tree.
- b) Click on the **Launch Current Profile** button (if running as an application).
- c) Click on the **Start** button (if running as a Service).