



## Upgrading to Version 8



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**Microsoft Partner**  
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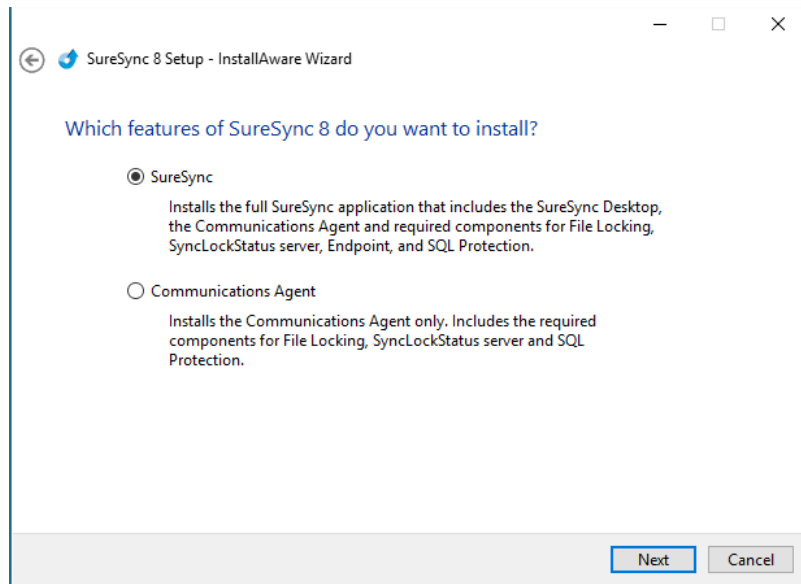
# Introduction

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This document outlines the process of upgrading to SureSync 8 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 8 version to the current release, please consult the [Updating SureSync 8 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 8

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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; Windows 10; Windows 8.1; Windows 8; Windows 7; Windows Vista; Windows XP
- **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 is a 32-bit application but will run on 64-bit versions of Windows. 64-bit editions of Windows include full featured emulation for running 32-bit code that allows SureSync to run on these operating systems. The File Locking Add-on is 64-bit compatible.

SureSync can synchronize data to operating systems such as 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 to store configuration information. The following formats are supported:

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

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.

To achieve optimal performance, SQL database is strongly recommended for setups using multi-directional rule types, environments with more than 50 Relations 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 SureSync installer will inspect your system for these components and offer to upgrade or install them as needed.

- Microsoft .NET Framework 4.5.2
- Microsoft .NET Framework 4.0 (Windows 2003/XP)
- Microsoft MDAC 2.8 Refresh with Service Pack 1
- Microsoft Visual C++ Runtime 14.0 (Visual Studio 2015)
- Microsoft Windows Installer 3.1
- Microsoft XML Parser 6.0
- Microsoft Jet 4.0 with Service Pack 8

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

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SureSync v8 is a major upgrade. This section outlines changes in SureSync v8 that you should be aware of before attempting to upgrade.

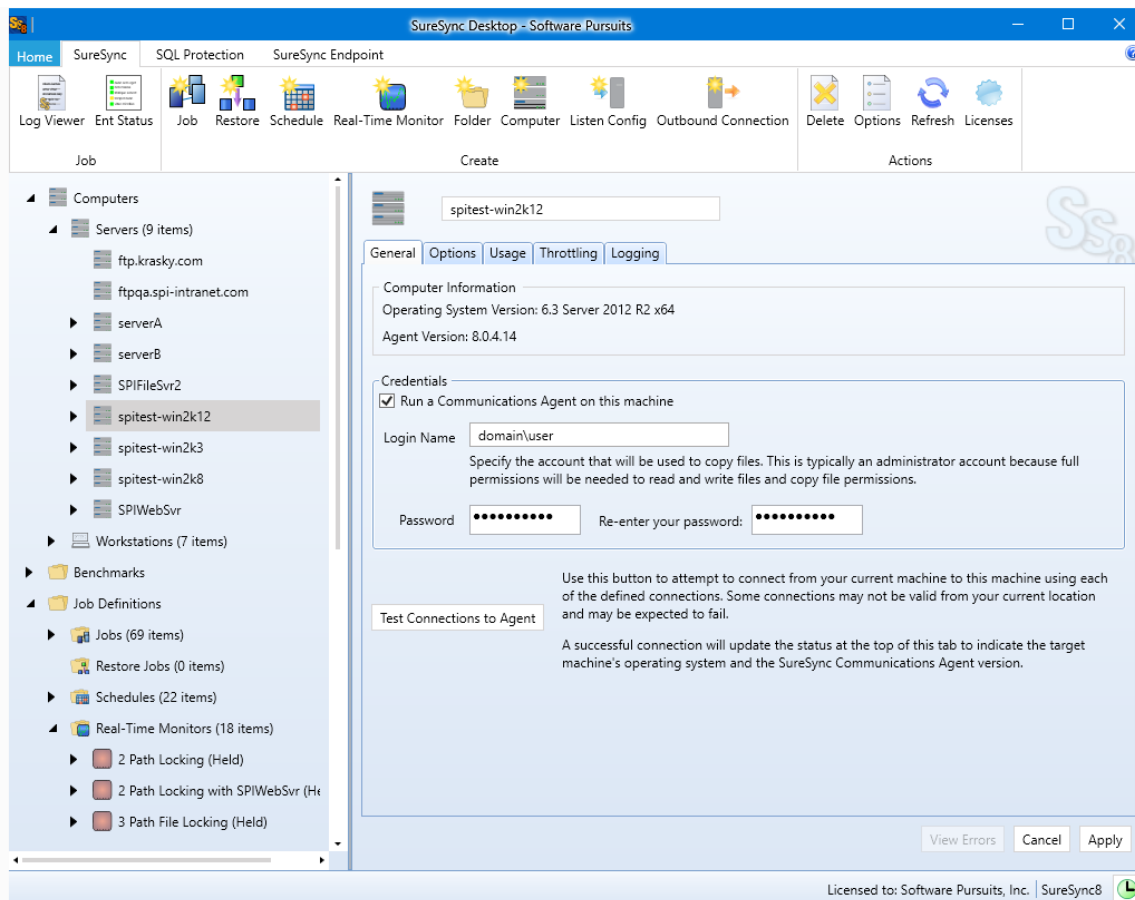
## Considerations for all versions

The changes in this section apply to users upgrading from any prior release of SureSync.

## Communications Agent Configuration Changes

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

In v8, you will now 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 of the configuration options such as username and password are available by clicking on the machine in question and navigating through the settings here.



## ***Communications Agent Port Changes***

SureSync 8's Communications Agent now 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 is TCP 9032.

Previous SureSync releases used different port numbers and ranges. SureSync 7 uses TCP port 9033. Before upgrading to SureSync 8, your firewalls must be configured to accept the new port or you must manually change your SureSync 8 connections to use the old 9033 port. The old port can only be used if SureSync 7 will not be used any longer in your environment.

SureSync 5 and 6 use the TCP port range of 9002-9033. If you used the default range and your firewalls were properly configured, SureSync 8 should work out of the box. Once the old version has been fully retired then you can modify firewalls to allow only the 9032 port used by SureSync 8 instead of the entire range.

SureSync 4 used the TCP port range of 8002-8033. If you're upgrading from SureSync 4, you need to ensure that the new 9032 port is open in all the firewalls between machines being synchronized. You can also use the Communications Agent Configuration Utility on each machine and configure SureSync 8 to use a port within the 8002-8033 range. Doing so is strongly discouraged because it requires a manual configuration change on each machine in your environment running either SureSync or the Communications Agent. In most network environments there will be fewer firewalls to configure than Communications Agent installations.

## ***User Interface Runs on 2008/Vista and Newer Only***

The user interface components such as the SureSync Desktop and status panels require the .NET 4.5.2 Framework or later. These frameworks are not available on Windows 2003 and XP meaning these applications cannot be run on those platforms.

The Communications Agent and Local Communications Agent Config Utility can still be run on Windows 2003 and XP using the .NET 4.0 Framework allowing synchronization with these operating systems in v8 with full functionality. If your current SureSync Desktop is running on Windows 2003 or XP, you will need to migrate that component to a different machine. Instructions for moving SureSync to a new machine can be found in the [Moving SureSync 8 to a New machine knowledge base article](#).

## ***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.

## ***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 v8.

### ***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 8 version.

### ***Coexistence of Versions***

The Communications Agent for SureSync 8 will not communicate with older versions. An option to have SureSync 8 coexist 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 8 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 8.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 of 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.

### ***Windows 2003 / Windows Vista Permissions for File Locking***

If you are using file locking with Windows 2003 or Windows Vista, the Network Service account must be made a member of the Power Users group on each Windows 2003 and Windows Vista machine in the locking job. This requirement is caused by different default security in these operating systems. Newer operating systems do not have this requirement. If the permission is missing, the file locking driver on the Windows 2003 or Windows Vista machine will not be able to detect users opening files via UNC path on those machines.

To add the permission, go to Start | Administrative Tools | Computer Management. Expand Local Users and Groups, click on Groups and then double click on Power Users. Click "Add." Click "Locations" and set the location to the local machine. Type in the account "Network Service." Click "OK" to add the account. Finally, click "Apply" and "OK" on the Power Users dialog to save the change.

If the Windows 2003 machine involved in the file locking environment is a domain controller then the "Network Service" account must be added to the domain Print Operators group to obtain the appropriate permissions. This is required because domain controllers do not have local accounts.

### ***Update Deployment Methods***

The remote SPIAgent machines cannot be upgraded using the SyncCmd /U operand. This tool is provided to aide 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 8 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 8, the maximum number of file copies occurring at any one time by default jumps to 20. If you're running a large number of 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 through the use of 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.

### ***Remote Differential Compression (RDC)***

With SureSync 8, the delta copy engine from Software Pursuits has been replaced with Microsoft’s Remote Differential Compression (RDC). 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 of 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.

#### **Windows 2008 / Windows Vista and Newer**

Starting with Windows Vista, RDC is enabled by default.

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.

#### **Windows 2003/ Windows 2003 R2**

For these operating systems the RDC components must be installed on each machine. Clicking on the links below will take you to the Microsoft download for the appropriate operating system.

- [32-bit](#)
- [64-bit \(AMD64\)](#)
- [64-bit \(IA64\)](#)

This step should be done before upgrading to ensure that delta copies are used when you enable your SureSync Jobs, Schedules, and Real-Time Monitors.

#### **Windows 2000 / Windows XP and Older**

RDC is not available with these operating systems and cannot be used. When synchronizing with these older operating systems, the whole file must be transferred.

### ***SureSync Database: Access vs SQL Server***

Access databases are great for small environments or environments that are using one-way Rules. This database type is easy to get started with and consumes a limited amount of system resources. However, Access does have limitations that can negatively impact the performance of your synchronization environment.

You should consider using Access when:

- Your environment consists of fewer than 50 Jobs, Schedules and Real-Time Monitors
- Your environment consists of nothing but one-way Rules like Mirror
- Your environment consists of a few machines (10 or fewer)
- The number of files being processed is less than 250,000

You should consider using SQL when:

- Your environment consists of more than 50 Jobs, Schedules and Real-Time Monitors
- Your environment uses multi-way Rule types such as Multi-Mirror (these store file history that puts a significantly higher I/O load on the database)
- Your environment is large with many servers (10 or more)
- The number of files being processed is greater than 250,000

Selecting the right database type will ensure optimal performance for SureSync. It is recommended to convert to a new database type after the upgrade. Instructions on moving from Access to SQL can be found in the Software Pursuits Knowledge Base at <http://kb.softwarepursuits.com/article.php?id=80>.

## Upgrading to SureSync 8

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This section will outline the process of upgrading your environment to SureSync 8. Details are provided for both “In Place” and “Staged” upgrade types. Please follow these instructions carefully.

### **Step 1: Prerequisite Checklist**

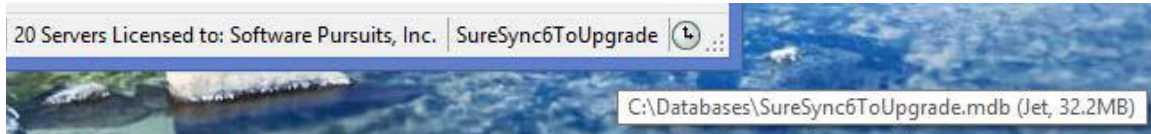
Before proceeding with your upgrade, make sure you have done the following steps.

- Obtain a valid SureSync 8 license. Licenses from previous versions will not be recognized by SureSync 8. Please call +1-650-372-0900 or send an e-mail to [Sales@SoftwarePursuits.com](mailto: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 8 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 8” 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.
- Determine upgrade type for your SureSync environment.
  - “In Place” upgrade where all of your previous version SureSync Jobs, Schedules and Real-Time Monitors are transitioned to SureSync 8 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

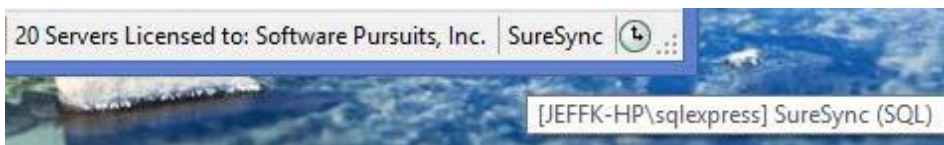
Scheduler clock Icon will be your database name. Placing your mouse over that name will present a tooltip that shows either the Access or SQL details for your database.

- ❑ 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 8 Software**

SureSync 8 will co-exist with older versions of the software. To ensure the smoothest upgrade possible, the v8 software should be deployed to all of the machines involved in the SureSync environment before attempting to upgrade the database and transition your synchronization / replication to SureSync 8. This allows you to install all required prerequisites and SureSync software without impacting your production SureSync tasks.

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 8 on each of the machines running a full SureSync installation. If you're upgrading from SureSync 6 or 7, the installer will automatically detect the appropriate setup type that is on the machine and set the SureSync 8 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.
- ❑ Local all machines running the SPIAgent (v6) or Communications Agent (v7). 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.
- ❑ On the machines running the SPIAgent or Communications Agent, run the SureSync 8 installer. If you're upgrading from SureSync 6 or 7, the installer will automatically detect the appropriate setup type that is installed on the machine and set the SureSync 8 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.

### **Step 3: Upgrade the SureSync Database**

You will now upgrade your SureSync database to the v8 level.

With an “In Place” upgrade, the database used for the previous version is upgraded directly. When this is complete, the database is no longer available for the previous version but a backup of the original database is retained.

With a “Staged” upgrade, a copy of the database is upgraded to the v8 level. This allow the original database to be available for use by the old version.

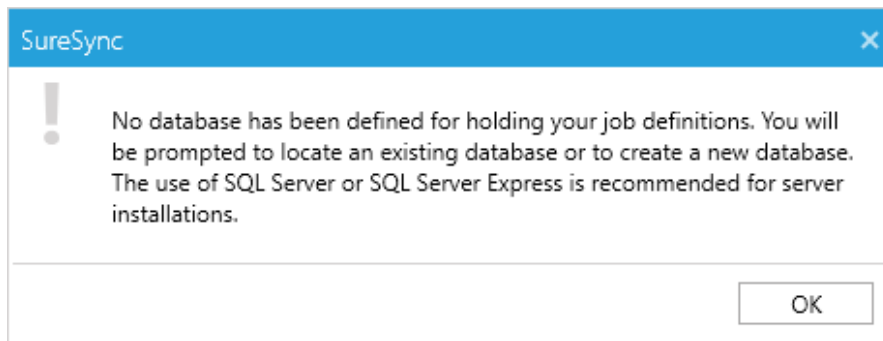
Two sets of instructions are provided. Please follow the instructions for the type of upgrade you are attempting to complete.

#### ***“In Place” Upgrade: Upgrading the SureSync Database***

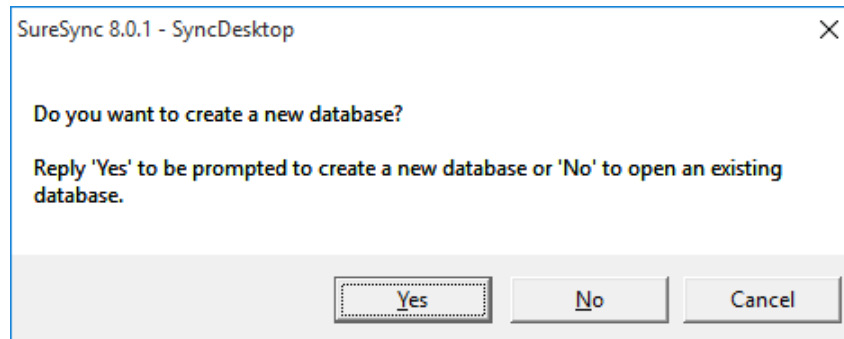
To start the process of upgrading the database, launch the SureSync 8 Desktop. This is done by going to Start | All Programs | SureSync 8 and clicking on the SureSync 8 Desktop shortcut.

All Jobs, Schedules and Real-Time Monitors should be stopped. Schedules and Monitors should be placed on hold to prevent them from launching until you have validated all your settings in SureSync 8. This should have been done in Step 2.

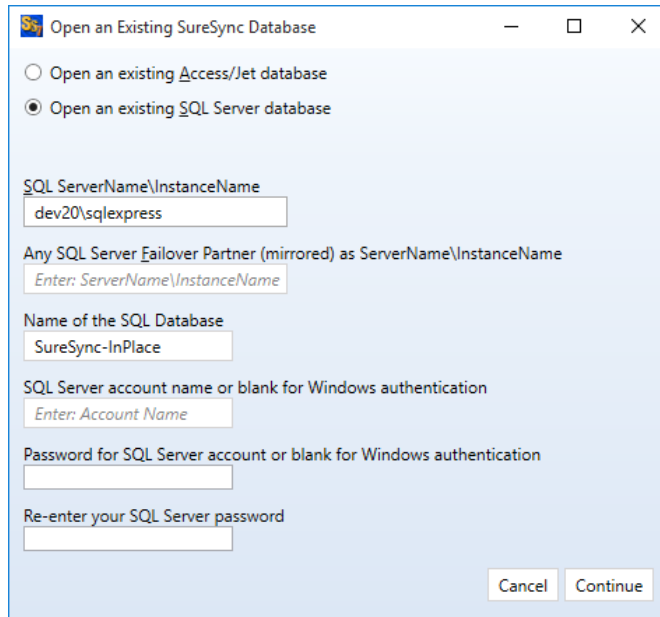
When the SureSync 8 Desktop launches, you will receive the following prompt:



Click the “OK” button to continue.



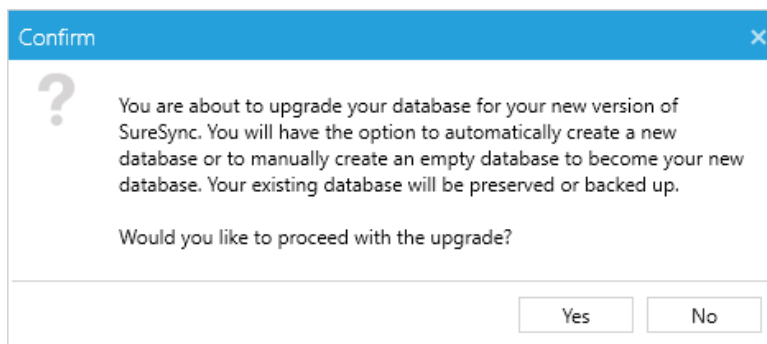
To perform an “in place” upgrade, we want to open an existing database. SureSync 7 will detect the database is from an old version and upgrade it. Click the “No” button to proceed with opening your old SureSync database.



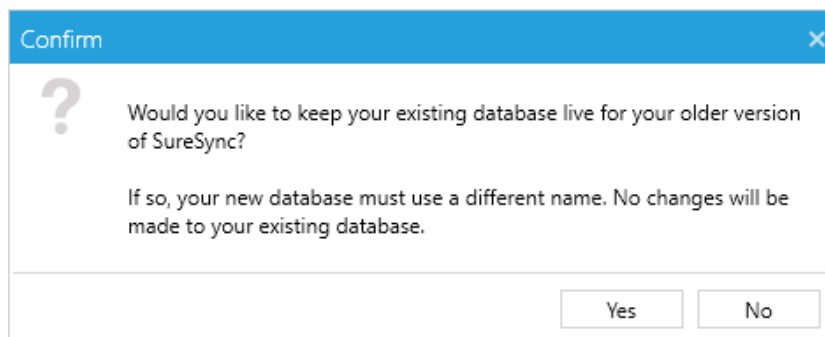
In the “Open an Existing SureSync Database” dialog, select either “Open an existing Access/Jet database” or “Open an existing SQL Server” database depending on what your environment is running. Provide the appropriate details for your database.

In this example, we are upgrading a SQL database named SureSync-InPlace on the dev20\sqlexpress SQL instance.

Click the “Continue” button to start the upgrade process.

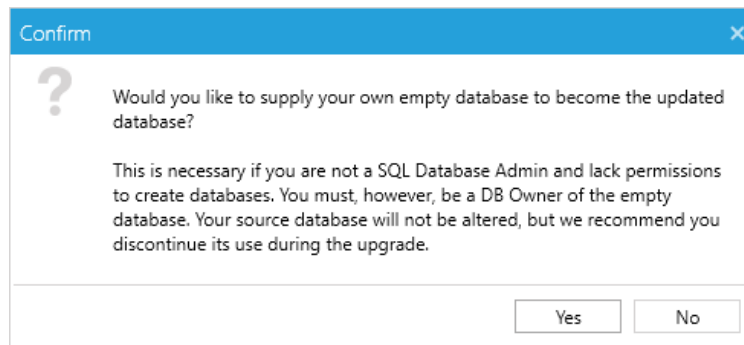


Click the “Yes” button to proceed with the database upgrade.



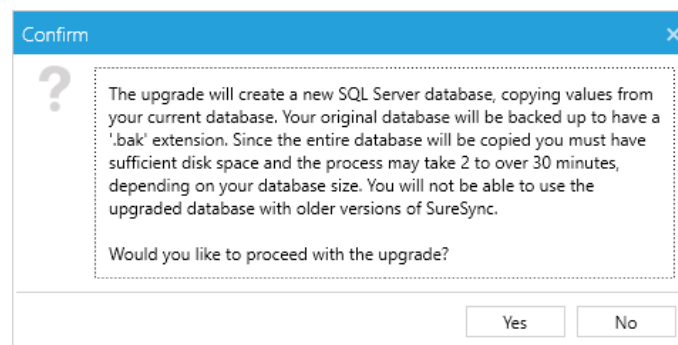
The next dialog determines if you want to keep the existing database available for your old version of SureSync or if you want to upgrade it to the current release. Once a database is upgraded to a newer version, it cannot be used with older releases.

We are performing an “in place” upgrade, where the existing database is upgraded, so click on the “No” button to proceed with upgrading the database.

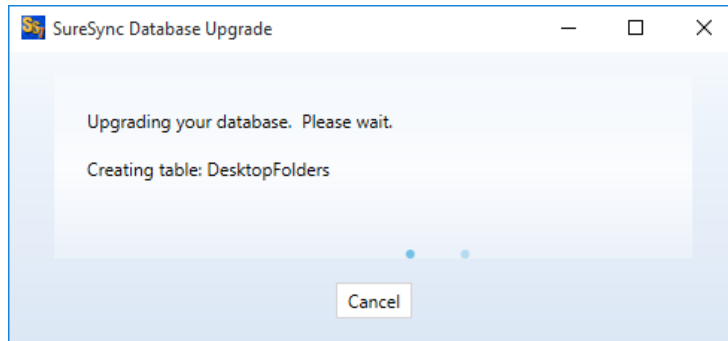


The “Would you like to supply your own empty database to become the updated database?” dialog is only used in situations where you’re running the upgrade under an account that does not have permissions to create a database. This occurs mainly in SQL installations where your user account is not a DB Owner. In those cases, you could create a blank SQL database in SQL using an account with DB Owner privileges and then answer “Yes” here to open that database and upgrade into it.

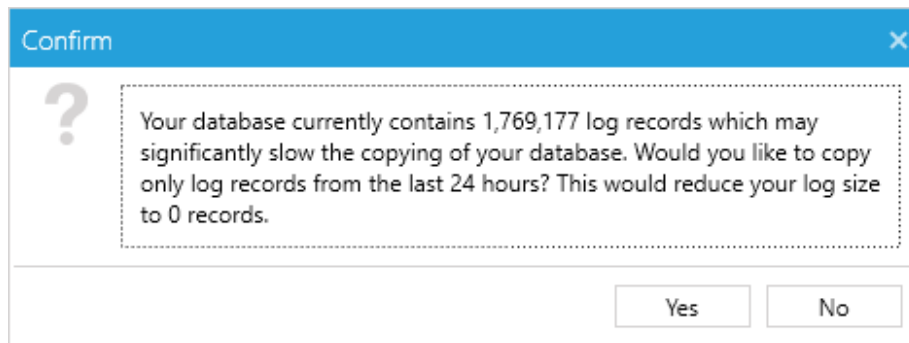
For our upgrade we have the appropriate permissions so there is no need to setup an empty database before proceeding. Click the “No” button to continue.



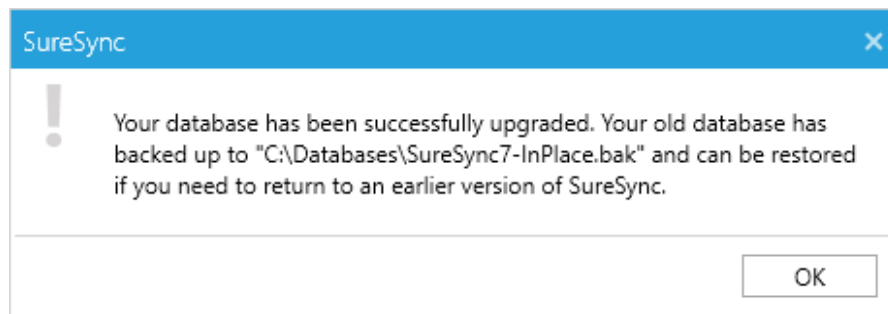
The next panel is a final confirmation before starting the database upgrade process. The text of the panel will be slightly different depending on if you’re upgrading an Access/Jet or SQL database. Click the “Yes” button to begin the upgrade.



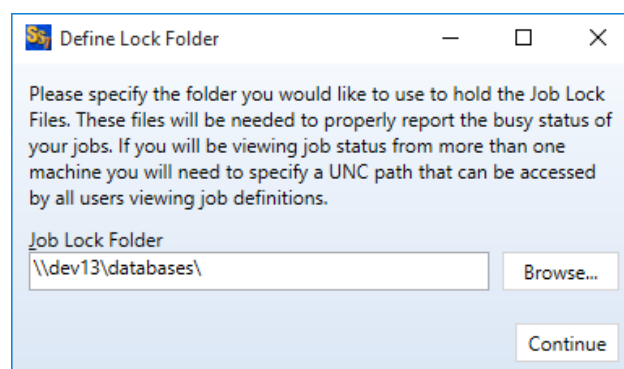
The next panel provides details about the database upgrade while it is being processed.



If your database contains a large number of log entries, you will receive a prompt asking if you want to copy all entries or keep only the last 24 hours of entries. It is recommended to keep only the 24 hours of log entries to reduce the upgrade time and clean up the database. Answer yes to delete the older entries or no to leave the entries.



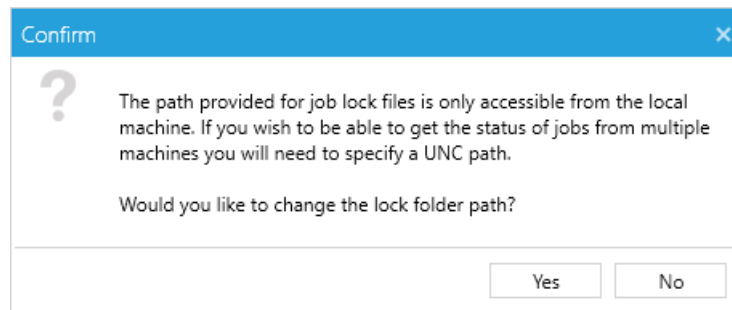
The next prompt indicates the upgrade was completed successfully. Click the "OK" button to continue.



If your database type is SQL, you will be prompted to define the lock folder. This is used to display busy status in the SureSync Desktop. The value in the old database is carried over. Click "Continue."

The lock folder path can be either a UNC path or local path. If you are planning to open the SureSync database from multiple installations of the SureSync Desktop, a UNC path that the users launching the application from have access to should be defined.

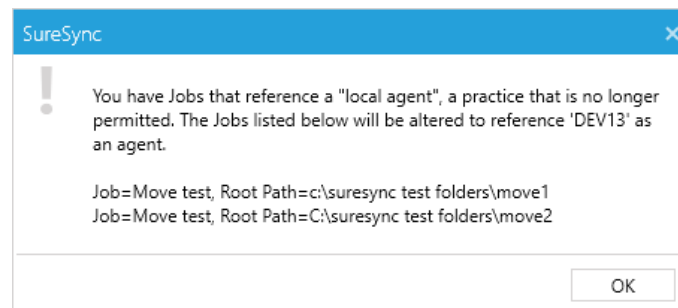
If using a local path, you will receive the following prompt:



Click "No" to continue on with the local lock folder path.

### Version 6 and Older

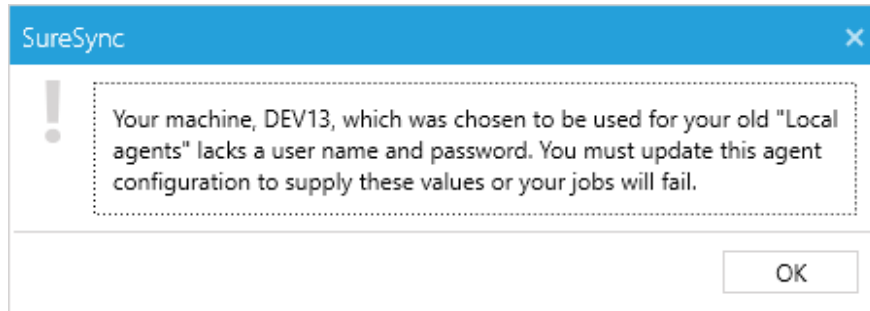
If you are upgrading from SureSync v6 or older, additional prompts can be presented.



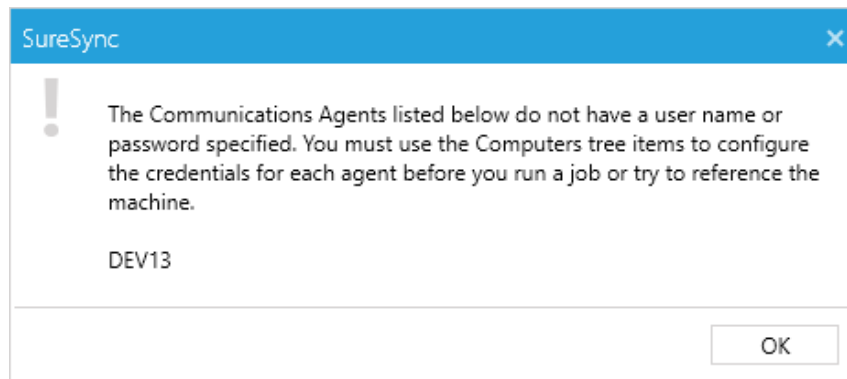
The use of [Local Agent] is no longer permitted. All paths must have a Communications Agent reference, even UNC and FTP paths. In these cases, the agent reference goes from being [Local Agent] to the named agent of the machine running the SureSync Scheduler. Generally, this is the same machine running the SureSync Desktop.

To aide in this transition, the upgrade process automatically detected all Jobs that reference [Local Agent] and converts them to the named agent of the SureSync Scheduler machine. All modified jobs will be listed in this dialog. You should note all of these Jobs so you can validate their settings before starting them in SureSync 8.

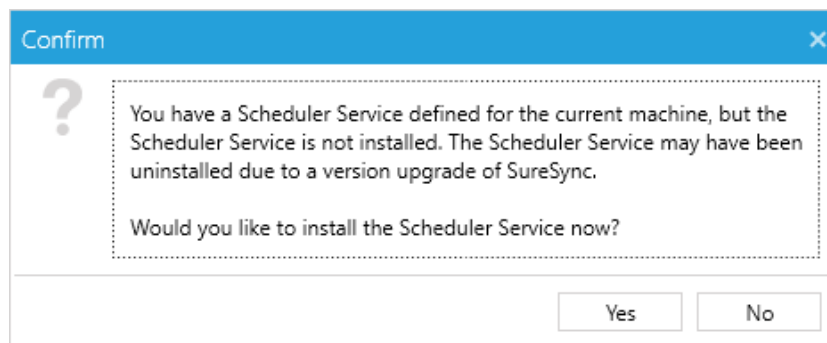




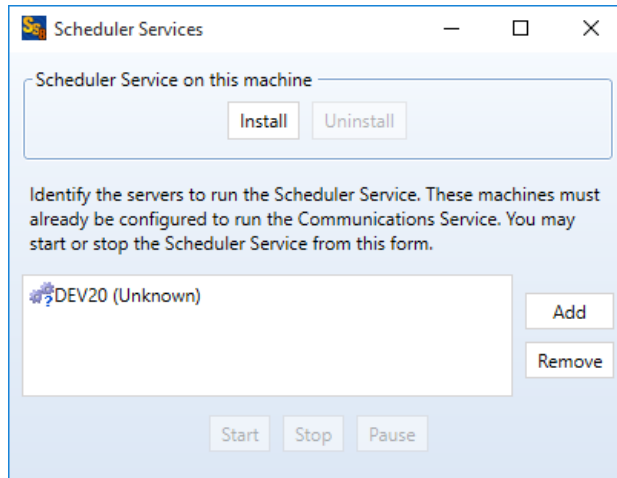
If the machine replacing your [local agent] definitions does not have a username and password already defined, you will receive the next prompt. When the upgrade is complete, expand Computers in the left hand pane of the SureSync Desktop. The Computers section is divided into Servers and Workstations. Click on the machine in question and on the General tab check "Run a Communications Agent on this machine." and provide a valid credential.



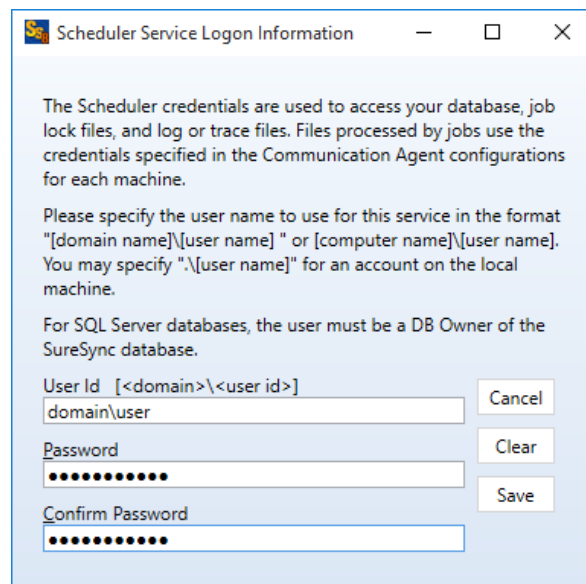
Similarly, if any other Communications Agents are defined in the database and do not have credentials, you will receive the next prompt. Credentials should be provided in the same way.



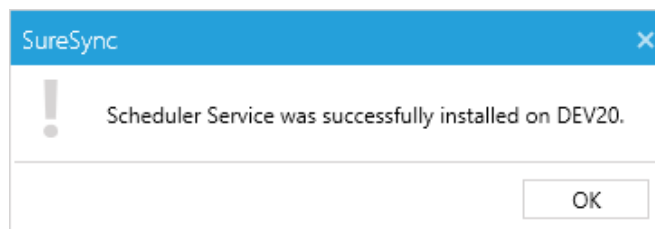
If your previous installation had an installed Scheduler, you will be prompted with the dialog above. Click the "Yes" button to install the Scheduler.



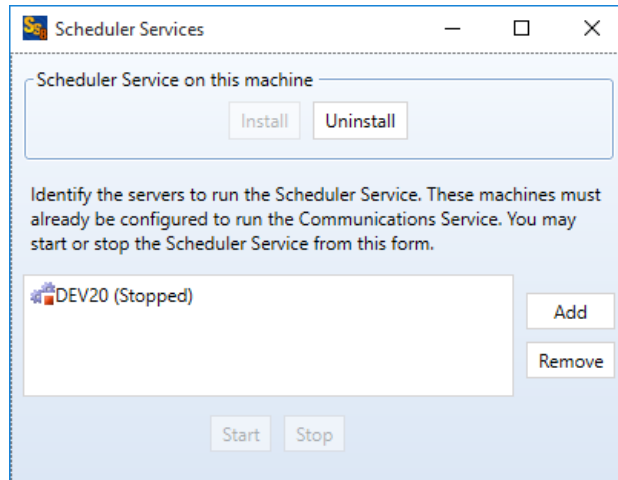
On the panel above click the “Install” button.



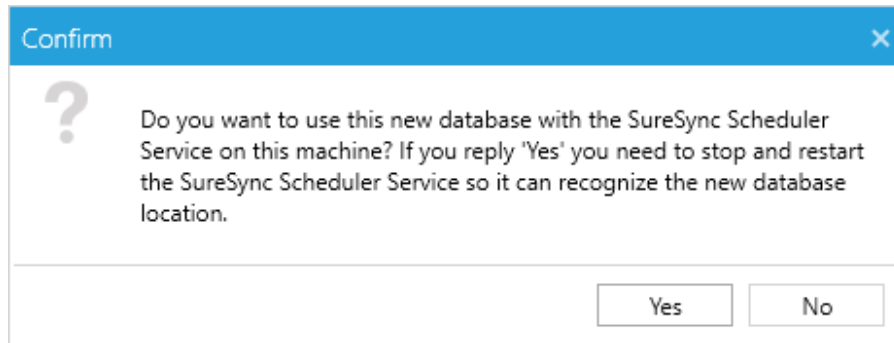
The next panel is where you define the username and password your Scheduler service runs under. Enter the username in domain\user or machine\user format and enter your password twice. Click the “OK” button to install.



You will then receive the above prompt indicating the service was successfully installed. Click the “OK” button to continue.



The scheduler service is installed stopped. Do not start the service yet. You want to validate the configuration of your Jobs before starting the service. Simply click the red “X” to close the panel



Click the “Yes” button on the “Do you want to use this new database with the SureSync Scheduler service on this machine” dialog. This updates the configuration so the Scheduler is using this newly upgraded database.

Your database is now upgraded. Please continue to Step 4: Completing the Upgrade section of this document to finish your upgrade.

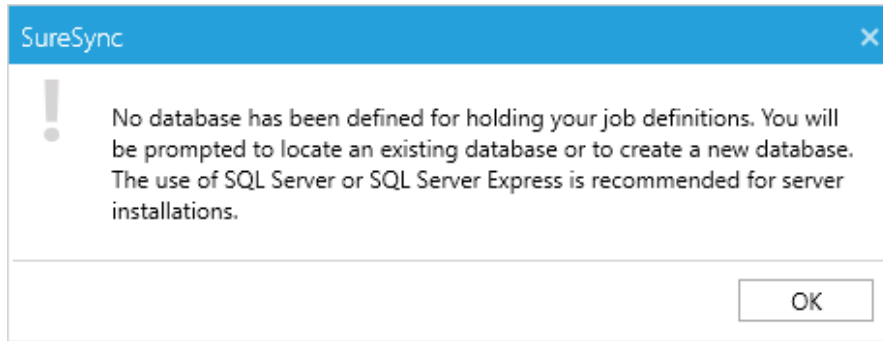
### ***“Staged” Upgrade: Upgrading the SureSync Database***

To start the process of upgrading the database, launch the SureSync 8 Desktop. This is done by going to Start | All Programs | SureSync 8 and clicking on the SureSync 8 Desktop shortcut.

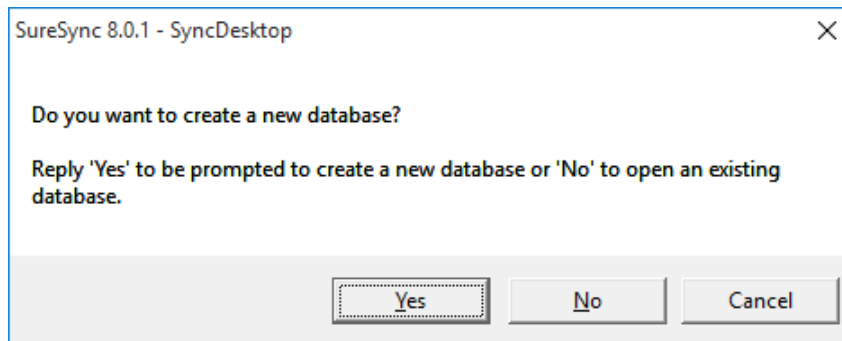
All Jobs, Schedules and Real-Time Monitors should be stopped. Schedules and Monitors should be placed on hold to prevent them from launching until you have validated all your settings in SureSync 8. This should have been done in Step 2.

Once the SureSync 8 database copy is created, you can restart your synchronization tasks. With a staged upgrade, some of these tasks can be left in the previous version and then slowly moved over to SureSync 8.

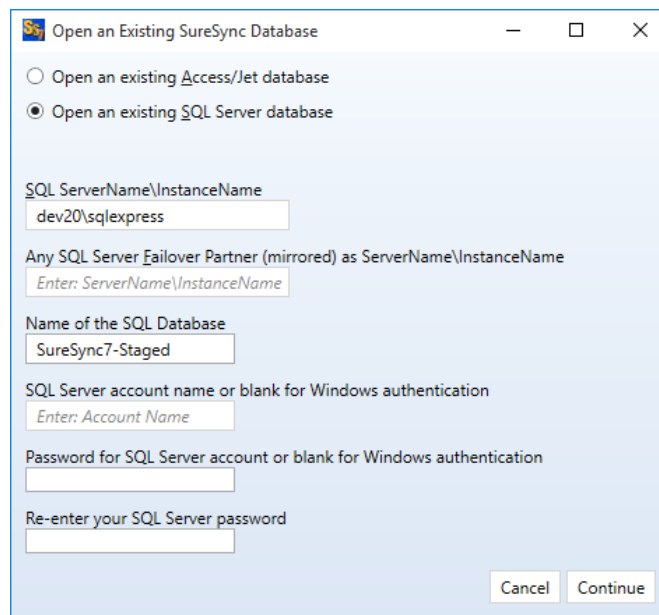
When the SureSync 8 Desktop launches, you will receive the following prompt:



Click the "OK" button to continue.



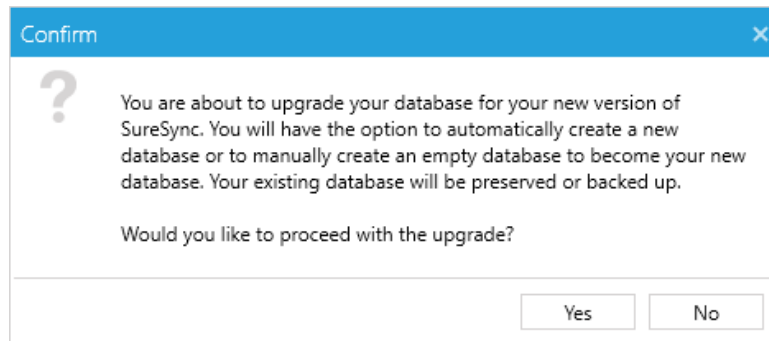
To perform a "staged" upgrade, we want to open an existing database. SureSync 8 will detect the database is from an old version and upgrade it. Click the "No" button to proceed with opening your old SureSync database.



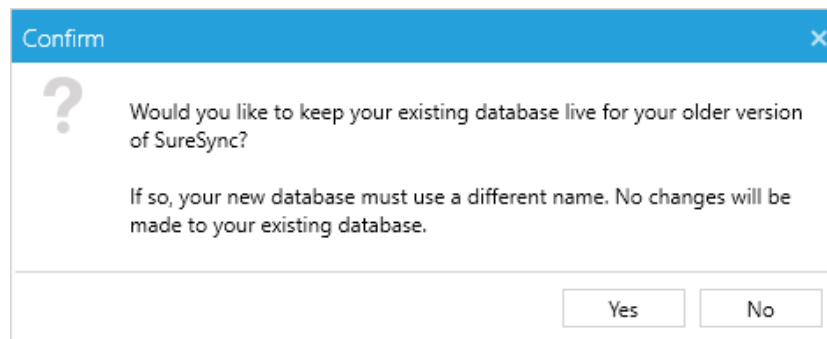
In the "Open an Existing SureSync Database" dialog, select either "Open an existing Access/Jet database" or "Open an existing SQL Server" database depending on what your environment is running. Provide the appropriate details for your database.

In this example, we are upgrading a SQL database named SureSync-Staged on the dev20\sqlexpress SQL instance.

Click the “Continue” button to start the upgrade process.

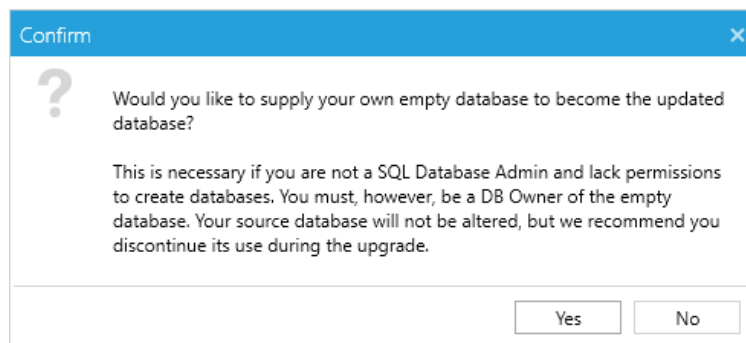


Click the “Yes” button to proceed with the database upgrade.



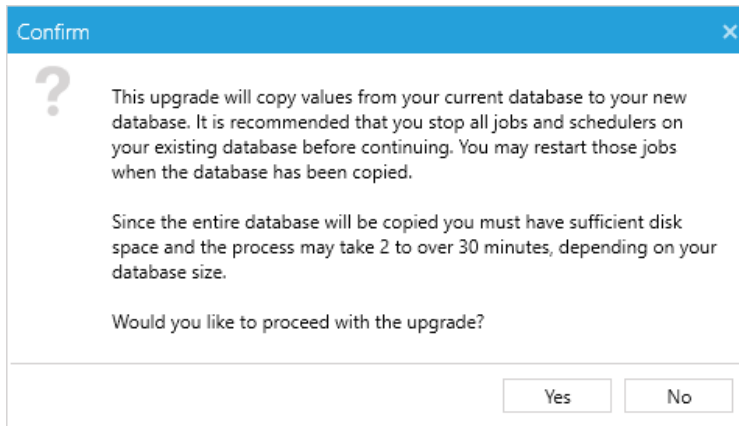
The next dialog determines if you want to keep the existing database available for your old version of SureSync or if you want to upgrade it to the current release. Once a database is upgraded to a newer version, it cannot be used with older releases.

We are performing a “staged” upgrade where a new database will be created for SureSync 7’s use with the contents of the old version copied into it. To accomplish this, click the “Yes” button.

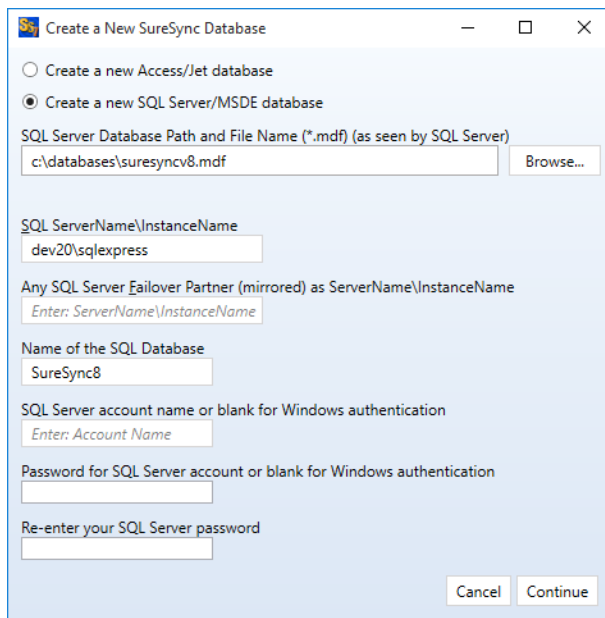


The “Would you like to supply your own empty database to become the updated database?” dialog is only used in situations where you’re running the upgrade under an account that does not have permissions to create a database. This occurs mainly in SQL installations where your user account is not a DB Owner. In those cases, you could create a blank SQL database in SQL using an account with DB Owner privileges and then answer “Yes” here to open that database and upgrade into it.

However, for our upgrade we have the appropriate permissions so there is no need to setup an empty database before proceeding. Click the “No” button to continue.



The next panel provides confirmation that you want to copy the data out of your existing SureSync database into a new SureSync 8 database. Click the “Yes” button to continue.

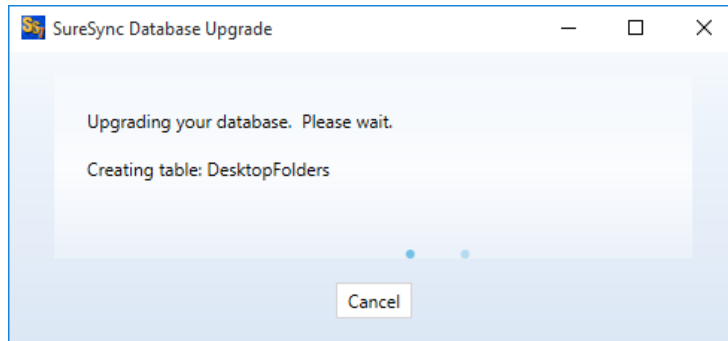


To do a staged upgrade, you must provide the details for the new database. You can create either an Access/Jet or SQL database to copy into.

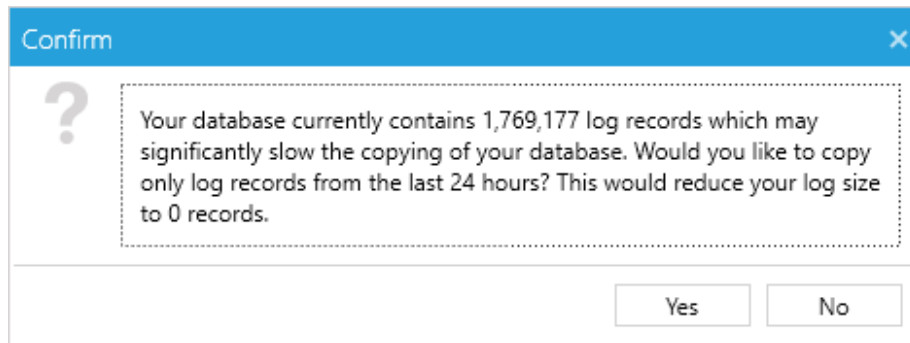
With Access/Jet, this will be the path to a new .mdb file. The name must be different from the previous version.

For this example, we are creating a SQL database named SureSync8. The name of the new SQL Database must not already exist on the SQL instance in question.

Click “Continue” to proceed.



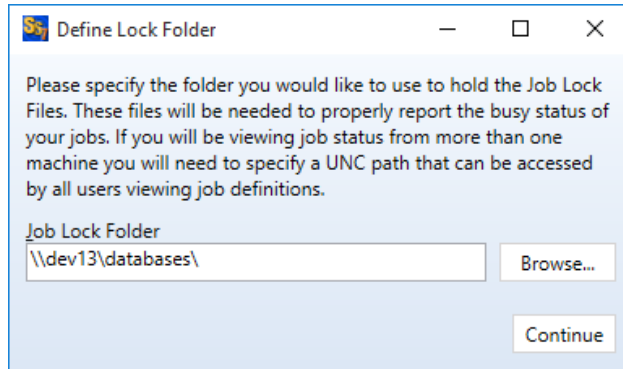
The next panel provides details about the database upgrade while it is being processed.



If your database contains a large number of log entries, you will receive a prompt asking if you want to copy all entries or keep only the last 24 hours of entries. It is recommended to keep only the 24 hours of log entries to reduce the upgrade time and clean up the database. Answer yes to delete the older entries or no to leave the entries.



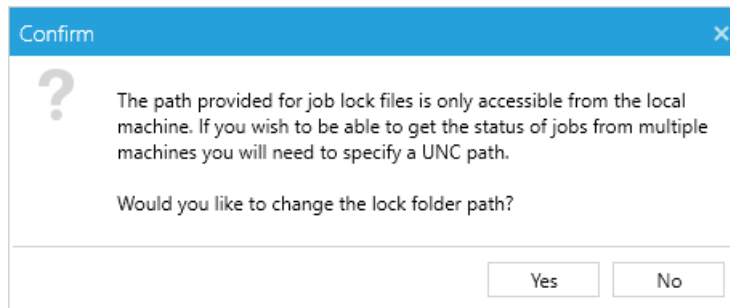
The next prompt indicates the new SureSync 8 database has been successfully populated with the data from your old database. Click the "OK" button to continue.



If your database type is SQL, you will be prompted to define the lock folder. This is used to display busy status in the SureSync Desktop. The value in the old database is carried over. Click "Continue."

The lock folder path can be either a UNC path or local path. If you are planning to open the SureSync database from multiple installations of the SureSync Desktop, a UNC path that the users launching the application from have access to should be defined.

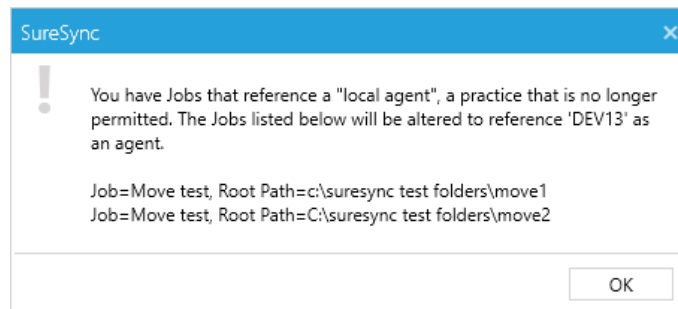
If using a local path, you will receive the following prompt:



Click "No" to continue on with the local lock folder path.

## Version 6 and Older

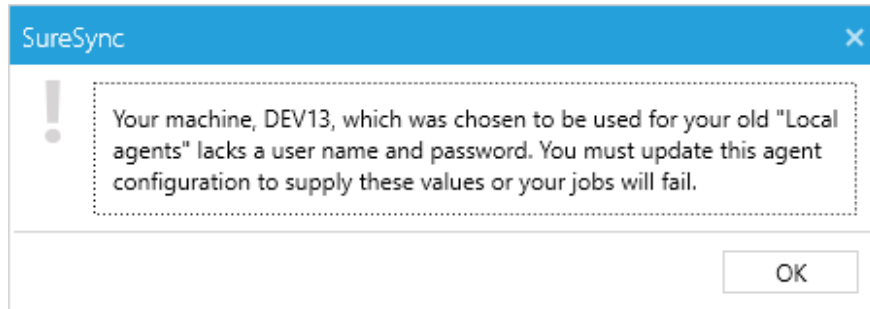
If you are upgrading from SureSync v6 or older, additional prompts can be presented.



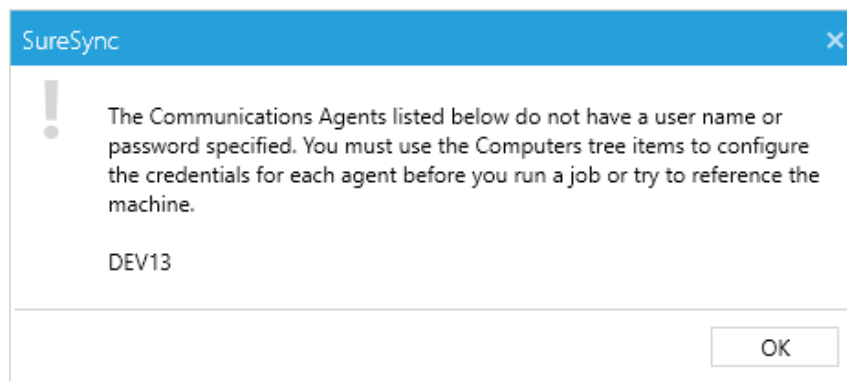
The use of [Local Agent] is no longer permitted. All paths must have a Communications Agent reference, even UNC and FTP paths. In these cases, the agent reference goes from being [Local Agent] to the named agent of the machine running the SureSync Scheduler. Generally, this is the same machine running the SureSync Desktop.



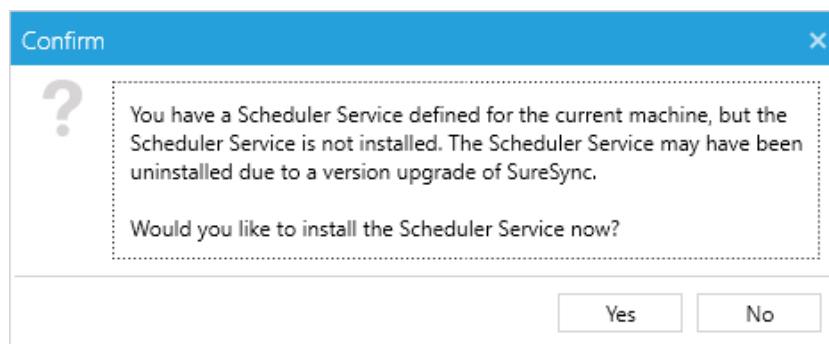
To aid in this transition, the upgrade process automatically detected all Jobs that reference [Local Agent] and converts them to the named agent of the SureSync Scheduler machine. All modified jobs will be listed in this dialog. You should note all of these Jobs so you can validate their settings before starting them in SureSync 8.



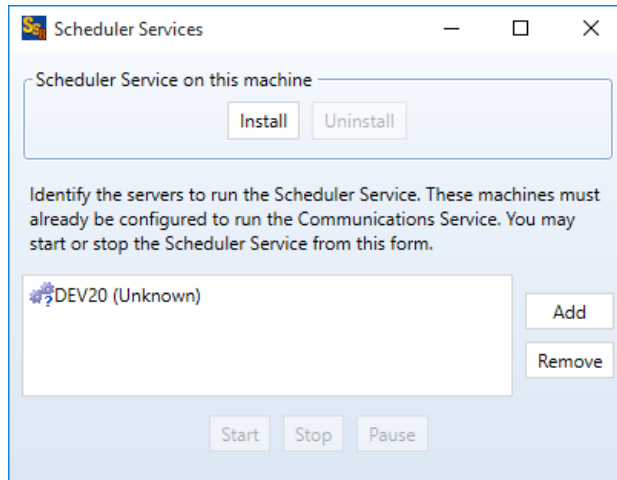
If the machine replacing your [local agent] definitions does not have a username and password already defined, you will receive the next prompt. When the upgrade is complete, expand Computers in the left hand pane of the SureSync Desktop. The Computers section is divided into Servers and Workstations. Click on the machine in question and on the General tab check "Run a Communications Agent on this machine." and provide a valid credential.



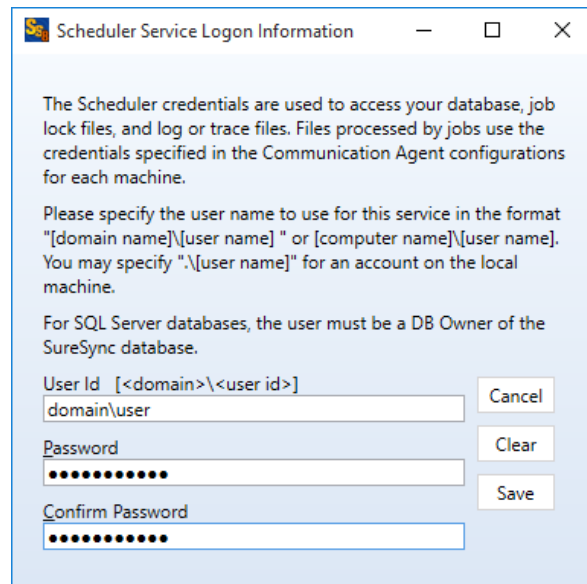
Similarly, if any other Communications Agents are defined in the database and do not have credentials, you will receive the next prompt. Credentials should be provided in the same way.



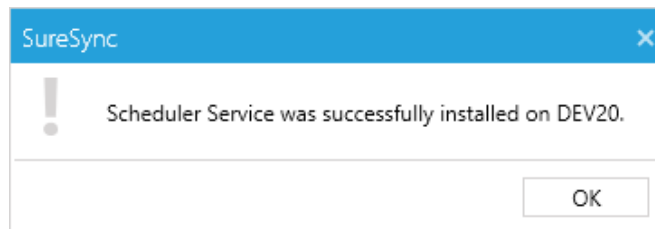
If your previous installation had an installed Scheduler, you will be prompted with the dialog above. Click the "Yes" button to install the Scheduler.



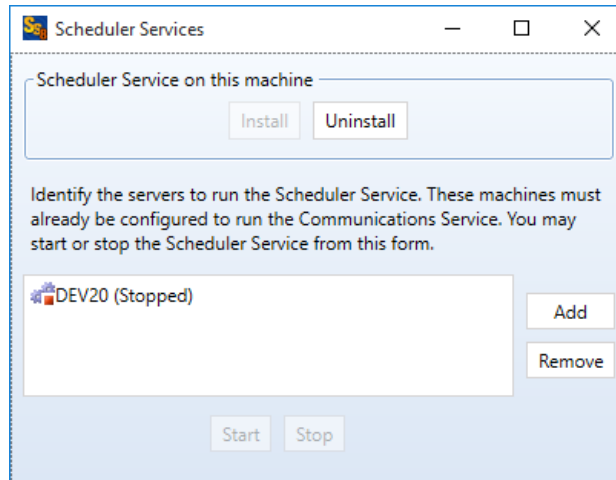
On the panel above click the “Install” button.



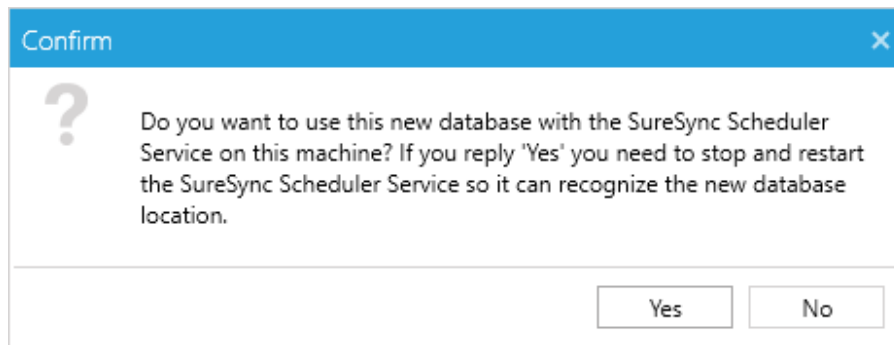
The next panel is where you define the username and password your Scheduler service runs under. Enter the username in domain\user or machine\user format and enter your password twice. Click the “OK” button to install.



You will then receive the above prompt indicating the service was successfully installed. Click the “OK” button to continue.



The scheduler service is installed stopped. Do not start the service yet. You want to validate the configuration of your Jobs before starting the service. Simply click the red “X” to close the panel



Click the “Yes” button on the “Do you want to use this new database with the SureSync Scheduler service on this machine” dialog. This updates the configuration so the Scheduler is using this newly upgraded database.

Your database is now upgraded. 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 8 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 8 and your previous version retired from production. Please do the following:

- ❑ When the upgrade is complete and the SureSync desktop loads, you will receive an error message about machines not being licensed. This occurs because SureSync 8 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 8 license.

- ❑ It is strongly recommended that you look through all of your Jobs to ensure that all of 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.
- ❑ Verify the following services are running.
  - ❑ "Software Pursuits SureSync 8 Communications Agent."
  - ❑ "Software Pursuits SureSync 8 Scheduler Service."
- ❑ Take your Schedules and Real-Time Monitors off hold. You're now running SureSync 8!
- ❑ Remove old versions of SureSync using "Add/Remove Programs" on each machine involved.

### ***"Staged" Upgrade: Completing the Upgrade***

With a "staged" upgrade, you can run some of your Jobs, Schedules and Real-Time Monitors in SureSync 8 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 absolutely essential that you do not overlap paths with SureSync 8 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 8 Job does the same thing. You must ensure that you turn off the synchronization in the old version for a particular synchronization task before enabling it in SureSync 8. Otherwise, you may get unexpected and unpredictable results.

- ❑ When the upgrade is complete and the SureSync desktop loads, you will receive an error message about machines not being licensed. This occurs because SureSync 8 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 8 license.
- ❑ It is strongly recommended that you look through all of your Jobs to ensure that all of 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.
- ❑ Verify the following services are running.
  - ❑ "Software Pursuits SureSync 8 Communications Agent."
  - ❑ "Software Pursuits SureSync 8 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.

- ❑ When you want to move a Job (Relation in v6 and older), Schedule or Real-Time Monitor to SureSync 8, stop it and place it on hold in your previous SureSync release. You can then start the SureSync 8 version of the same item.
  - ❑ If the Job, Schedule or Real-Time Monitor is a multi-directional Rule that has been run in your previous release since you performed the database upgrade then you should delete file history in the SureSync 8 version of the item. This will trigger a full rescan and rebuild the file history. This will prevent any unexpected behavior due to the file history in the SureSync 8 database being out of date. To do this, right click on the Job, Schedule or Real-Time Monitor and select “Delete file history.”
- ❑ Once all of your synchronization tasks are running in SureSync 8, you can remove the old version of SureSync from the environment using “Add/Remove Programs.”

## Upgrading from a Release Older than SureSync 3

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