



## Upgrade Instructions



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## Introduction

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This document outlines the process of upgrading from all previous versions of SureSync to the current SureSync 5 release level. Also included are instructions on migrating from an Access database to a SQL database.

## Upgrading to a Newer Version of SureSync 5

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1. Download the latest build of SureSync 5 by [clicking here](#). The full SureSync installer is named SureSyncSetup.exe. If you are using the SPIAgent add-on in your environment you should also download the SPIAgent only installer by [clicking here](#). The SPIAgent installer is named SPIAgentSetup.exe. It is recommended that all SureSync components on all machines involved in the synchronization be brought to the current version.
2. On the main SureSync machine where the full application is installed, stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab for each job to prevent them from launching until the upgrade is complete. Close SureSync and then stop the SureSync Scheduler and SPIAgent 5 services.
3. Launch the SureSync installer (SureSyncSetup.exe). The installer will ask if you would like to perform an upgrade to SureSync. Answer yes to the prompt and the upgrade will proceed.
4. On any SPIAgent machines run the SPIAgent only installer (SPIAgentSetup.exe). The installer will ask if you would like to perform an upgrade to SPIAgent 5. Answer yes to the prompt and the upgrade will proceed.
5. On the main SureSync machine(s) start the SureSync Scheduler and SPIAgent 5 services.
6. Start your Schedules and Real-Time Monitors to resume synchronization using the new version.

## Upgrading the SPIAgent File Locking Add-On

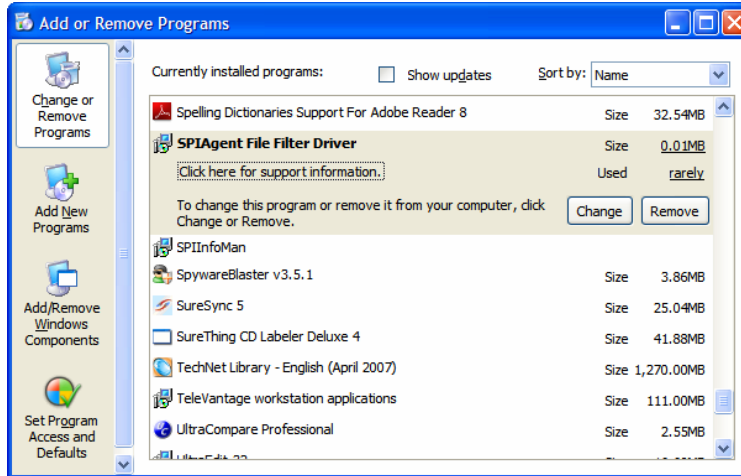
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If your installation is taking advantage of the SPIAgent File Locking Add-On there might be an updated version of the SPIAgent File Filter Driver to go along with the new version of SureSync. This is the driver which handles the file locking operations. This driver does not always change with each new release of SureSync so there are times when an upgrade of this component will not be needed.

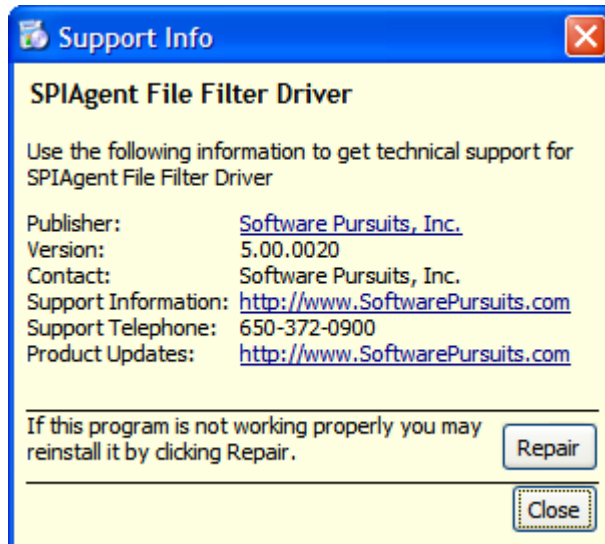
The version of the driver which is compatible with the current release of SureSync is always found on our [SureSync download page](#). This driver might not change with each release so it's possible the version number of the driver might be a couple of versions behind the current SureSync release. For example, you might be running SureSync 5.0.10 and the SPIAgent File Filter Driver is at version 5.0.07. The [SPIAgent File Filter Driver Version Information](#) page also lists compatibility information for all versions of SureSync and the SPIAgent File Filter Driver.

## Determining the Installed SPIAgent File Filter Driver Version

If you're unsure of the current version of the SPIAgent File Locking Driver on a particular machine you can verify this information by launching Control Panel and double clicking on "Add or Remove Programs". Scroll down the list until you see "SPIAgent File Filter Driver" and click on it.



Then click on "Click here for support information" and you will see the following popup which displays the version and other support information. The machine in this example has the 5.0.20 version of the SPIAgent File Filter Driver installed.



## Upgrading the SPIAgent File Filter Driver

If the version listed on the download page is newer than the one installed on your machine or you have consulted our [SPIAgent File Filter Driver Version Information](#) page and determined you need to upgrade then follow the steps below to upgrade the SPIAgent File Filter Driver on your machines.

**Note:** Upgrading the SPIAgent File Filter Driver requires a reboot of each machine which is receiving the upgraded driver.

### Steps to Upgrade the SPIAgent File Filter Driver

1. Download the latest build of the SPIAgent File Filter Driver by clicking [here](#).
2. Launch the SPIAgent File Filter Driver installer (SPIAgentFileFilterDriver.exe) on each machine involved in the file locking synchronization job. The installer will ask if you would like to perform an upgrade. Answer yes to the prompt and the upgrade will proceed.
3. Reboot the machine when the installer prompts to do so. You may also answer no to the reboot and reboot at a more convenient time. However, please note this reboot must be done before resuming the file locking job.

**Note:** You must upgrade all SPIAgent Filter Driver installations to the version compatible with the current release of SureSync you are upgrading to before resuming your synchronization jobs.

## Important Information Regarding SPIAgent Ports

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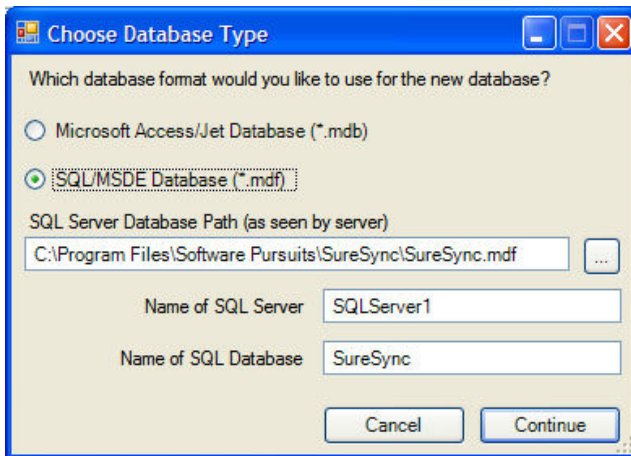
SureSync 5 uses a different TCP port range than SureSync 4. This allows both versions to co-exist on the same network. This will allow you to deploy an upgrade in a slower, more structured manner. Once the upgrade is complete you can simply remove any remaining SureSync 4 components and close the ports opened for that version.

SureSync 4 used 8002-8033 for the default TCP port range. SureSync 5 uses 9002-9033 for the default TCP port range. If you are using the SPIAgent add-on, be sure to plan to change the TCP port range in any firewalls which might block the traffic.

You can also use the SPIAgent Configuration Utility on each SureSync/SPIAgent 5 machine and change the port range manually to the 8002-8033 range. This is not recommended because it requires a manual configuration change on each machine in your environment, running either SureSync or the SPIAgent. In most network environments there will be less firewalls to configure than SPIAgent installations.

# Upgrading an Access Database to a SQL Database

In addition to the default Access database format SureSync supports SQL 2000 and SQL 2005 databases. This includes the free versions of each (MSDE and SQL 2005 Express). SQL is a higher performance and more durable database format that is recommended for larger SureSync installations. SureSync provides a copy database function to provide simple migrations to the SQL database format.



## Steps to convert database from Access to SQL

1. Go to **File | Database | Copy**, which will bring up the window above.
2. Select "SQL/MSDE Database (\*.mdf)" from the list.
3. In the "SQL Server Database Path (as seen by server)" field you need to enter the path where you want SureSync to create the SQL data file.
4. Enter the name of the SQL server or the SQL server instance name in the "Name of SQL Server" field. Please note that the "SQL Data File Path" field is from the perspective of the machine listed here. For example, in the screenshot the "C:\Program Files\Software Pursuits\SureSync\" directory must exist on the SQLServer1 machine for the database to be able to be created.
5. In the "Name of SQL Database" field you should enter the name of the database. It is recommended that this be left at SureSync.
6. Click the continue button and the copy process will start. This can be quite a lengthy process depending on the size of the original database.

## Some Notes on SQL

1. SureSync supports SQL 2000 Server, SQL 2005 Server, MSDE, and SQL 2005 Express. The MSDE and SQL 2005 Express engines can be downloaded from [Microsoft's SQL page](#).
2. Your SQL server must be running either Windows Integrated Security or Mixed Security. SQL only security is not supported. If your SQL server is running SQL only security you will need to use MSDE or SQL 2005 Express on the machine where SureSync is installed. We recommend using SQL 2005 Express.
3. The account, which SureSync is running under, must have permissions to create a database on the SQL server and permissions to access that database. Please contact your SQL server administrator for assistance with this.

## Upgrading from SureSync 4 to SureSync 5

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**Important:** If you are upgrading from SureSync 4 to SureSync 5, you must obtain a new license number. Please call +1-650-372-0900 or send email to [Sales@SoftwarePursuits.com](mailto:Sales@SoftwarePursuits.com) to purchase an upgrade license. The upgrade is free to those with a Support and Upgrade Plan.

**Note:** SureSync 5 requires the Microsoft .NET 2.0 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

To upgrade from SureSync 4 to SureSync 5 please do the following:

1. Download the current version of SureSync 5 by [clicking here](#). Make sure that you have your SureSync5.lic file available to you. SureSync 5 uses a different license file than the SureSync 4 release and your old SureSync4.lic file will not be recognized by the program once you upgrade. Our sales department can be contacted at +1-650-372-0900 for more information about obtaining upgrade licenses.
2. On the main SureSync machine(s) where the full application is installed stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab to prevent them from launching until the upgrade is complete. It is recommended that you run a compact database from **File | Database | Compact** before upgrading. If you're running a SQL database the compact operation is not available and can be skipped. Then close SureSync. Once that is done stop the SureSync Scheduler Start and SPIAgent services.
3. Run the installer for the new version and follow the on screen prompts to perform the upgrade. If you have installed to a path other than C:\Program Files\Software Pursuits\SureSync then remember to do a custom install and select the correct path.
4. Launch SureSync. If your database is in the default location of C:\Program Files\Software Pursuits\SureSync then it will automatically be upgraded. If you are using a SQL database or an Access database in a non-default location you must open it from **File | Database | Open Existing Database...**
5. DCOM is no longer used in SureSync 5 to run the Scheduler service. You must install a new Scheduler to resume running Schedules and Real-Time Monitors. To install the new Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
6. Verify that the SureSync Scheduler and SPIAgent 5 services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 5.0!

**Note:** The SPIAgent for version 4 and version 5 will co-exist on the same machine. This allows you to slowly migrate to SureSync 5 in large scale deployments. Once you have upgraded your SPIAgent machines to version 5 and no longer need the 4 version of the SPIAgent you can remove the 4 version by using the Add/Remove Programs control panel.

**Note:** If you are using a release older than 4.1.21 the default installation directory was C:\Program Files\SureSync instead of the now current C:\Program Files\Software Pursuits\SureSync. If you are using a database stored in C:\Program Files\SureSync the database will remain there after the upgrade. You can either move it into C:\Program Files\Software Pursuits\SureSync and then open it in SureSync 5 or you can open it in its current location and leave the database there.

# Upgrading from ArchiveSync 4 to SureSync 5

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ArchiveSync has been integrated into SureSync 5. To upgrade to the current release of ArchiveSync you would migrate to SureSync 5.

**Important:** If you are upgrading from ArchiveSync 4 to SureSync 5, you must obtain a new license number. Please call +1-650-372-0900 or send email to [Sales@SoftwarePursuits.com](mailto:Sales@SoftwarePursuits.com) to purchase an upgrade license. The upgrade is free to those with a Support and Upgrade Plan or rental agreements.

**Note:** SureSync 5 requires the Microsoft .NET 2.0 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

To upgrade from ArchiveSync 4.x to SureSync 5.x please do the following:

1. Download the current version of SureSync 5 by [clicking here](#). Make sure that you have your SureSync5.lic file available to you. SureSync 5 uses a different license file than the ArchiveSync 4 release and your old SPILicense.lic file will not be recognized by the program once you upgrade. Our sales department can be contacted at +1-650-372-0900 for more information about obtaining upgrade licenses.
2. Launch ArchiveSync and place any Schedules and/or Real-Time Monitors on hold to prevent them from being launched during the upgrade process. It is also recommended that you compact your database by going to **File | Database | Compact**. If you're running a SQL database the compact operation is not available and can be skipped.
3. Launch the SureSync 5 installer and follow the on screen instructions to install the product.
4. SureSync 5 does not upgrade ArchiveSync 4 so that you may continue using your ArchiveSync installation during a large migration. Once you have completed the move to SureSync 5 then you would remove ArchiveSync using the Add/Remove Programs Control Panel applet.
5. The default installation directory for ArchiveSync was C:\Program Files\Software Pursuits\ArchiveSync. The default ArchiveSync.mdb was created there. If this is the database you are using then you can either move the ArchiveSync.mdb to C:\Program Files\Software Pursuits\SureSync, rename it to SureSync.mdb (optional), then open it in SureSync to upgrade the database. You can also leave the database in the original directory and open it from there to upgrade. If you're using a SQL database or an Access database in a non-default location you will need to launch SureSync and then go to **File | Database | Open Existing Database...** to open the database and have it upgraded.
6. DCOM is no longer used in SureSync 5 to run the Scheduler service. You must install a new Scheduler to resume running Schedules and Real-Time Monitors. To install the new Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
7. Verify that the SureSync Scheduler and SPIAgent 5 services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 5.0!

**Note:** The SPIAgent for version 4.x and version 5.x will co-exist on the same machine. This allows you to slowly migrate to SureSync 5 in large scale deployments. Once you have upgraded your SPIAgent machines to version 5 and no longer need the 4.x version of the SPIAgent you can remove the 4.x version by using the Add/Remove Programs control panel.

# Upgrading from SureSync 3 to SureSync 5

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**Important:** If you are upgrading from SureSync 3 to SureSync 5, you must obtain a new license number. Please call +1-650-372-0900 or send email to [Sales@SoftwarePursuits.com](mailto:Sales@SoftwarePursuits.com) to purchase an upgrade license. The upgrade is free to those with a Support and Upgrade Plan or rental agreements.

**Note:** SureSync 5 requires the Microsoft .NET 2.0 Framework, Microsoft MDAC 2.8, Microsoft Jet 4.0 SP8, and the Windows Installer 3.0 or newer versions of each component. The SureSync installer will check your system for adequate versions of all components and will offer to install them for you if the components are needed.

To upgrade from SureSync 3 to SureSync 5 please do the following:

1. Download the current version of SureSync 5 by [clicking here](#). Make sure that you have your SureSync5.lic file available to you. SureSync 5 uses a different license file than the 3 release and your old SureSync.lic file will not be recognized by the program once you upgrade. Our sales department can be contacted at +1-650-372-0900 for more information about obtaining upgrade licenses.
2. On the main SureSync machine(s) where the full application is installed stop any running jobs. Schedules and Real-Time Monitors should be placed on hold on the General tab to prevent them from launching until the upgrade is complete. It is recommended that you run a compact database from **File | Compact Database** before upgrading. Once that is done stop the SureSync Scheduler Start service.
3. Download the latest release of SureSync 4 by [clicking here](#). To upgrade from SureSync 3 to SureSync 5 you must first upgrade to SureSync 4. Once that upgrade is complete you can then upgrade from SureSync 4 to SureSync 5. Launch the installer and follow the on screen directions to perform the upgrade. Launch SureSync 4 and your database will be upgraded to the SureSync 4 level. Close SureSync once the database has been upgraded.
4. Launch the SureSync 5 installer (SureSyncSetup.exe) and follow the on screen instructions to perform the upgrade. Once the installer has completed launch SureSync. If your database is in the default location of C:\Program Files\Software Pursuits\SureSync then it will automatically be upgraded. If you are using a SQL database or an Access database in a non-default location you must open it from **File | Database | Open Existing Database...** and then the database will be upgraded.
5. DCOM is no longer used in SureSync 5 to run the Scheduler service. You must install a new Scheduler to resume running Schedules and Real-Time Monitors. To install the new Scheduler launch SureSync and then go to **Tools | Schedulers**. Click the 'Install' button and provide a valid username and password which you want SureSync to run under. This user must be specified as machine\user or domain\user.
6. If you were using the Real-Time Option please note that this is now part of the SPIAgent add-on. On the other machines involved in your Real-Time Monitors you will want to remove the SureSync 3.1 install. Once this is done download the SPIAgent only installer (SPIAgentSetup.exe) by [clicking here](#). Install this on each of the other machines involved in the synchronization which does not have a full SureSync installation on it. You will then need to configure the agents and modify your relations to reference the agents. Directions on doing so can be found in the SPIAgent and Real-Time sections of our [Getting Started Guide](#).
7. Verify that the SureSync Scheduler and SPIAgent 5 services are started. Then take your Schedules and/or Real-Time Monitors off hold. You're now on SureSync 5.0!

## 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 5 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.