



## **PeerSync Reviewer's Guide**

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# Reviewer's Guide

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# 1 Introduction

PeerSync is Peer Software's flagship file synchronization and backup product. PeerSync facilitates centralized and efficient data consistency, disaster recovery, software distribution and network management across all environments: WANs, LANs, SANS, via a remote connection where files can be synchronized with those on the network, as well as between laptop and desktop. The newest version of PeerSync works with all storage media, including DAT, Zip drives, optical drives, etc., and offers an expanded range of flexible, scalable and user-friendly data synchronization solutions that ensure data integrity and reliability, while promoting collaboration among workers in today's increasingly distributed work force.

This guide is designed to facilitate a thorough, easy-to-follow evaluation of PeerSync's feature set and promotes a clear understanding of its real-world applications. Should you require any clarification or more information, please contact Peer Software at 631.979.1770. Someone from technical support will expeditiously answer any and all questions to make your evaluation process as smooth and hassle free as possible.

## System Requirements

### PeerSync Workstation:

Windows XP Home Edition/Professional or higher  
PIII equivalent or higher processor  
512 MB of RAM  
3x the amount of free hard disk space that is allocated for data directories

### PeerSync Server Edition:

Windows 2003 Professional or higher  
PIII equivalent or higher processor  
512 MB of RAM  
3x the amount of free hard disk space that is allocated for data directories

### System Recommendations - HVS, Enterprise, or Collaboration Editions (up to 50 threads)

Windows 2003 Professional or higher  
PIII equivalent or higher processor  
512 MB of RAM  
3x the amount of free hard disk space that is allocated for data directories

### System Requirements - HVS, Enterprise, or Collaboration Editions (Each Additional 50 threads)

250 MB of RAM

### REQUIRED FOR ALL INSTALLATIONS

Microsoft® Internet Explorer 5.5 or higher (6.0 recommended)  
Super VGA (800x600) or higher-resolution video adapter and monitor  
Supported file systems and devices  
Access to a mapped network drive  
High Speed Internet Access

### File systems supported for backup and recovery tasks:

FAT16, FAT16X, FAT32, FAT32X  
NTFS  
Dynamic Disks  
Linux® EXT2/3 and Linux Swap Partitions  
Hard drives and removable media supported:  
USB and FireWire® (IEEE 1394) devices

Access to a mapped network drive  
SCSI or Atapi (QIC157) tape device

The manufacturer of PSListener makes no warranties, implied or otherwise, for use of this product. User assumes all responsibility for any data loss or damage.

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## 2 Contact Information

### About Peer Software

Peer Software develops network management and data synchronization tools, which allow organizations to seamlessly and securely manage their digital and human assets. Peer Software's In Sync Solution Series provides centralized management of mission critical processes, promoting data consistency and security, as well as facilitating software distribution, desktop monitoring, knowledge transfer, and a host of activities to sustain seamless business communications and improve operating efficiencies. Customers include the Department of Justice, MCI, Merrill Lynch, Columbia University, VISA, RSA Communications, Fannie Mae, etc. Peer Software products are available online at <http://www.peersoftware.com>. The company is privately held.

If you require further information or need clarification on anything contained in this Reviewer's guide, please contact us at:

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## 3 Component Applications

PeerSync Component Applications	
<b>PeerSync</b>	This application contains all required functions to process and execute designed <a href="#">Synchronization Profiles</a> .
<b>Profiler</b>	This application is the front end to PeerSync. Designed to be an easy and well-organized interface to all of the many features of PeerSync. Can be operated simultaneously while the PeerSync engine is running in the background, allowing updates to <a href="#">Profiles</a> without having to stop existing synchronization processes.
<b>PS Wizard</b>	This application contains many basic synchronization scenarios in a pre-defined format. The end-user need only select a Source and Target Folder to synchronize, and the Wizard fills in all of the detailed information to perform the operation. All scenarios in the Wizard are completely end-user definable, and will support additional user-defined scenarios.

## 4 Glossary

Glossary	
<b>Synchronization</b>	Updating any existing files or adding new files in the Target Folder using the Source Folder as the guide. When completed, the Target Folder should contain all of the files in the Source Folder with matching content and time stamps.

<b>Replication</b>	Same as synchronization, except files that are in the Target Folder that do not have a matching Source File will be deleted.
<b>Profiles</b>	<p>A Profile is a description of a complete synchronization scenario. Profiles can contain many Source-Target combinations allowing the end-user to define very detailed file synchronizations and run them all within a single request. For example, you could build a Profile that contains Multiple Source and Target Folders such as:</p> <pre> Source = C:\My Documents Target = N:\USERS\TEST\My Documents  Source = D:\LocalData Target = N:\USERS\TEST\Local Data  Source = C:\WINDOWS\Profiles Target = N:\USERS\TEST\Profiles </pre> <p>Each of these Source - Target entries can then be further detailed with more than 65 options each making each entry a completely self contained process, and still allowing it to be run as part of a bigger set or Profile.</p>
<b>Jobs</b>	A Job is a single entry in a Profile. A Profile can contain from one to 255 Jobs and each Job contains more than 65 individual option settings.
<b>Real-Time Mode</b>	In this mode of operation, PeerSync will automatically detect changes made to the Source Folder(s) and execute the synchronization options selected for the matching Job. Typically, the Target Folder is updated with the Source Folder change within moments of the change. Note that PeerSync may have completed the operation before Windows actually displays the change in the Target Folder Explorer window.
<b>Scheduled Mode</b>	In this mode of operation, PeerSync will execute the designated Job at the selected time. Each Job in the Profile can have the same or different time interval.

## 5 Quick-Sync



### Quick-Sync Feature

This feature was introduced for a quick and easy way of constantly synchronizing a work folder on the fly with the option to modify your Job settings at a later time.

1. Right click on any folder you wish to sync and select "Quick-Sync Folder..."
2. This will launch PS Wizard, which will ask you to select a Target Folder to sync to.
3. Follow the wizard to configure the Quick-Sync run. You also have the options to edit and/or add the current sync Job to your Quick-Sync Profile or any other selected Profile. Anytime you select a Folder if it matches any Source or Target selections in the Quick-Sync Profile then the Jobs will be listed to pick from or you have the option to add a new Job.

## 6 Demonstrations

### 6.1 Demonstration Notes

#### Reviewer's Demonstration Notes

PeerSync can be run in many different ways. To facilitate your evaluation, we developed a new part of PeerSync called the PSWizard. To start an automated demonstration of PeerSync, follow these steps:

1. Install PeerSync on to your PC by running the provided installation application: ps74.exe.
2. From your Windows Start menu, select Programs - Peer Software - PeerSync File

Synchronization - PeerSync Wizard. This will start the PSWizard application.

3. From the PSWizard application, select the Demonstration Tab and chose either "Demonstration Real -Time - Source to Target" or "Demonstration Scheduled - Source to Target".

**Note:** You can also access these demonstrations from within Profiler under the Help menu item.

## 6.2 Demonstration of Real-Time Mode Operation

### Demonstration of Real-Time Mode Operation

This demonstration will create "\PSDemoSource" and "\PSDemoTarget" folders on your local drive, where PeerSync is installed. PeerSync will be started with this demonstration Profile. Additionally, you will see two Windows Explorer windows containing the Source and Target Folders respectively. To view PeerSync operating in Real-Time mode, try one of the following tests:

1. Right click the mouse in the Source Folder, and select New Text Document from the Explorer pop-up menu.
2. The new file should automatically appear in the Target Folder.
3. Delete a file from the Source Folder, and the matching Target Folder should automatically be deleted.
4. Select a few files in the Source folder, and copy and past them to the Source Folder.
5. All newly added files in the Source should get matching files in the Target Folder.
6. Create a new folder under the Source folder. The matching Target sub-folder should be created.

#### Notes:

1. PeerSync may have completed the operation before Windows actually displays the change in the Target folder Explorer window.
2. To terminate PeerSync, right click on the PeerSync Tray icon in the lower right corner of your display.

## 6.3 Demonstration of Scheduled Mode Operation

### Demonstration of Scheduled Mode Operation

This demonstration will create "\PSDemoSource" and "\PSDemoTarget" folders on your local drive where PeerSync is installed. PeerSync will be started with this demonstration Profile. Additionally, you will see two Windows Explorer windows containing the Source and Target folders respectively. In this mode, PeerSync will synchronize the Source Folder to the Target Folder every 15 seconds. To view PeerSync operating in a scheduled mode, try one of the following tests:

1. Right click the mouse in the Source Folder, and select New Text Document from the Explorer pop-up menu. The new file should automatically appear in the Target Folder within 15 seconds.

2. Delete a file from the Source Folder, and the matching Target Folder should automatically be deleted within 15 seconds.
3. Select a few files in the Source Folder, then copy and paste them to the Source Folder. All newly added files in the Source should get matching files in the Target Folder within 15 seconds.
4. Create a new folder under the Source Folder. The matching Target sub-folder should be created within 15 seconds.

**Notes:**

1. PeerSync may have completed the operation before Windows actually displays the change in the Target Folder Explorer window.
2. To terminate PeerSync, right click on the PeerSync Tray icon in the lower right corner of your display.

## 7 Evaluation Scenarios

### 7.1 How to synchronize files and folders from your laptop to your desktop computer.

#### How to synchronize files and folders from your laptop to your desktop computer?

##### Objectives

1. Adding, updating and/or replicating files from your laptop to your desktop.
2. Creating a shortcut on your desktop to run the synchronization on demand.

##### Requirement

It is assumed that your laptop will be connected to your network via a docking station, through a PC card or by direct connect cable (refer to Microsoft Windows online help).

1. Open the Profiler Application
2. Select Source and Target Folders
  - a. Go to the Folder Selection screen.
  - b. Select a Source folder on your laptop that you wish to synchronize from.
  - c. Select a Target folder on your desktop that you wish to synchronize to.
3. Set File and Folder Exceptions
  - a. Go to the Exceptions screen.
  - b. Specify files/folders to include/exclude by setting the appropriate items.
4. Configure any other items you may require by selecting the appropriate screen
5. Save the Profile
6. Add icon to Windows Desktop to execute this Profile
  - a. Go to the Startup Options screen.
  - b. Click on the "Add to Desktop" button. A Desktop icon will be added to your desktop with the name given to the active Profile that you have just created.
7. Run Profile from Desktop Icon

## 7.2 How to synchronize files and folder over a RAS or VPN connection:

How to synchronize files and folder over a RAS or VPN connection?
<p><b>Objectives</b></p> <ol style="list-style-type: none"> <li>1. Automatically connect to a remote network using RAS or VPN.</li> <li>2. Synchronize selected files/folders.</li> <li>3. Disconnect remote network connection.</li> </ol>
<p><b>Requirement</b></p> <p>It is assumed that your VPN and or RAS connections have been created and are accessible through your environment.</p>
1. Open the Profiler Application
<p>2. Select Source and Target Folders</p> <ol style="list-style-type: none"> <li>a. Go to the Folder Selection screen.</li> <li>b. Select a Source folder on your laptop that you wish to synchronize from.</li> <li>c. Select a Target folder on your desktop that you wish to synchronize to.</li> </ol>
<p>3. Set File and Folder Exceptions</p> <ol style="list-style-type: none"> <li>a. Go to the Exceptions screen.</li> <li>b. Specify files/folders to include/exclude by setting the appropriate items.</li> </ol>
<p>4. Build .CMD or .BAT external batch files to execute</p> <ol style="list-style-type: none"> <li>a. Open a text editor such as Notepad and create a new document.</li> <li>b. Add the following line to the document: start rasdial.exe "Connection Name" /DOMAIN:DomainName</li> </ol> <p>(Where Connection Name and Domain Name are replaced with your network connection information as specified in the specific RAS or VPN connection screen). Please note the use of double quotes around the Connection Name.</p> <ol style="list-style-type: none"> <li>c. Save the file as ConnectRAS1.CMD in the PeerSync installed folder "C:\Program Files\PeerSync" (default).</li> <li>d. Create a new document, and add the following line: start rasdial.exe "Connection Name" /DISCONNECT</li> <li>e. Save this file as DisConnectRAS1.CMD in the PeerSync installed folder "C:\Program Files\PeerSync" (default).</li> </ol>
5. Save the Profile
<p>6. Add icon to Windows Desktop to execute this Profile</p> <ol style="list-style-type: none"> <li>a. Go to the Startup Options screen.</li> <li>b. Click on the "Add to Desktop" button. A Desktop icon will be added to your desktop with the name given to the active Profile that you have just created.</li> </ol>
7. Run Profile from Desktop Icon
8. Go to The Run Active Profile Screen and Launch the Profile to connect and synchronize with your remote network.

## 7.3 Additional Scenarios

### Challenge 1

How to update user's data folders each day at logon with files that were updated the night before. Additionally, how to push system and application files out to users on the LAN/WAN on a daily basis.

PeerSync can be configured to run at startup of each PC to synchronize folders from a server to the user's local PC. Files such as collaboration or databases that get assembled off-line, and then need to be redistributed to the user's PC daily. A global telecommunications company has been using PeerSync to push updated files (Oracle form files) from a central server to all of their regional teleconferencing centers. These files contain the data that had been generated the previous day. Each user works off a local set of information so they can be more responsive to their customers, and not be delayed by network traffic across their WAN.

Additionally, PeerSync can be used to update software applications that may have been revised or updated without a technician having to physically go to each PC and copy the files. PeerSync can synchronize data from a server directory specifically setup to contain updates that need to be "pulled" out to each individual PC.

### Challenge 2

Keep two data folders on each office desktop backed-up to a server, and then backup up to tape for off site remote storage. Backed-up data must be recoverable with-in minutes of loss.

Run PeerSync on every office PC, monitoring selected data folders for changes. Upon detection of file change, PeerSync synchronizes selected folders to server backing up data immediately. Servers are then backed-up to tape on a weekly basis and tapes are stored off site.

Typically, if you use tape backup as the primary back-up method, network traffic can be a problem, each PC in the office will have to be accessible during backup times rendering the PC unusable for a period of time. Data is only as good as the last scheduled backup, which could be days or weeks out of sync. Recovery of data can be difficult because first you have to locate the correct tape then, assuming the tape is recoverable; you have to wade through directory structures on the tape to identify the correct file to be recovered. This process can be time consuming and frustrating.

With the PeerSync scenario recovery of the file can be done from an active server so what took possibly hours or days (if tape is off-site) from a tape can be accomplished in minutes using PeerSync. Office PC's are backup in Real-Time so backed-up data is only seconds out of sync and PeerSync works in the back ground so the end-user may not even be aware that the synchronization is taking place.