

Goals:

- Backing up user workstations or laptops to a centralized corporate server/location
- Backup process should auto-start on the workstations or laptops and become minimized/hidden after start-up and password protected so that the end-users cannot see or change the configuration Profile
- Have the ability to centralize configuration and administration for monitoring backup

Requirements:

- **PeerSync™ Workstation** needs to be installed on every Workstation or Laptop. Installation is supported on Windows Operating Systems only including Vista. This will allow for real-time, scheduled, or interval replication from the workstations/laptops. To achieve bi-directional real-time synchronization with the destination server PeerSync needs to be installed on both sides
- Workstations and/or Laptops are connected via a LAN to the destination backup server (Otherwise would require the **TCP WAN Connector (TCP)** add-on option for replication over TCP/IP)
- (Optional) **Enhanced Package w/ EOFM** add-on for the purposes of backing up locked files such as PST files
- (Optional) **ByteReplicator** add-on for transfer of only the block-level changes within a file. This option requires the **PSListener** to be installed on the target server
- (optional) the **Observer Enterprise Edition v1.1** can be running on any computer on the network for centralized viewing of all PeerSync activity on the network

1. Creating the Profile

The following is a list of recommendations for creating Profiles to be used in a workstation/laptop backup scenario. The backup configuration Profile is saved as a .SNC file, which can be distributed to each of the workstations from a central point during initial deployment as well as when you make changes.

1. Begin by installing PeerSync on one workstation/laptop
2. Start the PeerSync Profiler (PSProfiler.exe)
3. Create a new Job and specify the Source and Target paths in the **Folder Selection** window
 - o To customize the Source and Target to be used on different machines you would want to use the **%UserName%** variable in the path name

Example: (specify an individual's My Documents and backup directories)

Source - C:\Documents and Settings\%UserName%\My Documents\

Target – \\Server\Share\BackUp\%UserName%\

- o Repeat this step if you need to set up additional Source/Target combinations (Jobs)
4. Make additional Profile adjustments as needed to achieve the desired backup configuration. See http://www.peersoftware.com/support/ps_documents.asp?sp=tu for Real-Time or Scheduled backup configuration recommendations
 5. (Optional) If you want to hide the Profiler upon activation of PeerSync go to the **Options/Commands** window, double-click on the **Command Line Arguments** field and replace the **/GL** argument with **/GLS**
 6. To suppress and hide the splash screen at start up for both the PeerSync and Profiler applications add **/H** to list of **Command Line Arguments**
 7. (Optional) To password protect the Profile from being edited or stopped, go to the **Options/Commands** window and click on the **Set access Password...** button. Once a password is provided a **PeerSync.PWL** file will be created in the C:\WINDOWS folder
 8. (Optional) An icon will appear on the system tray when the PeerSync Engine is loaded. A menu will appear if a user right-clicks on it, which can allow for the termination of PeerSync if it is not password protected as in step 6 above. To hide the PeerSync system tray icon uncheck the **Show tray icon** option in the **Options/Command** window
 9. Once you have created the Profile to be run on the workstations/laptops, save the Profile to a **Network** shared drive accessible to every machine you wish to run the Profile on. This allows the network administrator to modify any of the Jobs in the Profile at any time and not have to redistribute the file to all the other machines

- Go to **File** → **Save As** → enter Profile name
 - Test the Profile on one machine for intended outcome and make the necessary changes if needed
 - Follow the steps in Part 4 below for recommendations on central Profile distribution
10. (Optional) The users will be able to modify the .SNC Profile unless the file is given **Read Only** access. To do so, simply right-click on the .SNC Profile → **Properties** → check the **Read-only** check box in the **General** tab. Note: You will need to uncheck this option every time you wish to update the Profile
11. (Optional) If you want PeerSync to run automatically when a user logs on, go to the **StartUp/Service** window and check **Add to Windows StartUp**
- Now click on the **Show StartUp Folder** button and find the PeerSync shortcut created
 - Right-click on it and make sure the path to the .SNC profile is universal to all the users' machines (using a UNC path to the Profile saved in step 7)
 - Right-click on it and select **Copy**
 - Now paste the shortcut on your desktop for later retrieval in Part 2 below

2. CREATE THE INSTALLATION FOLDER FOR OTHER MACHINES (minimum 5 licenses)

The following steps will prepare the necessary files to perform a silent installation of PeerSync and distribution of Profile(s). In order to create an **Installation Folder** for each workstation/laptop you must first gather the necessary files to be installed. Once this has been done simply distribute the **Installation Folder** to all the workstations/laptops and launch the installation process. This process allows for a single PeerSync configuration to be distributed to **n** number of machines.

1. Begin by creating a folder to be designated as the Installation Folder (i.e. **PeerSync Install**)
2. In the **PeerSync Install** folder create the following directories:

Add to Install Folder

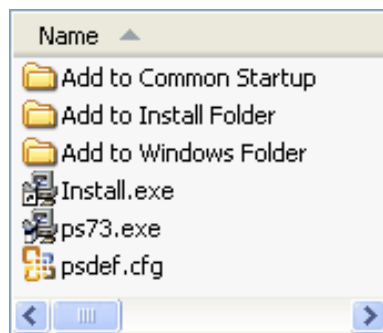
Add to Windows Folder

Add to Common Startup

The contents of these folders will be installed in the corresponding directories for each workstation/laptop. The following optional installation folders are also supported: *Add to Windows System Folder, Add to Windows System32 Folder, Add to Startup, Add to Desktop, Add to Common Desktop, Add to Start Menu, Add to Common Start Menu*

3. Place the PeerSync **installation file** (i.e. ps7.3.exe) into the **PeerSync Install** folder
 - Create a shortcut of the **installation file** in the **PeerSync Install** folder

- o Right-click on the shortcut → **Properties** → **Shortcut** tab → type **/S** at the end of the **Target** field → **OK**. This will ensure that the PeerSync installation will run silently. Only a tray icon will be shown when performing the installation
 - o Give the shortcut an intuitive name (i.e **Install.exe**) by renaming the shortcut
4. Copy the **PSDEF.CFG** file from the PeerSync installation folder into the **PeerSync Install** directory. This file contains the PeerSync registration information necessary for PeerSync activation. Note: For PeerSync purchases of 5 or more licenses you will be issued a single registration code for all installations
- o Append the following to the end of the **PSDEF.CFG** file (exclude comments):
 Installation Folder= C:\Program Files\PeerSync (*i.e. desired **install directory***)
 Disable Install Reboot=Yes (*suppress rebooting (if needed) after installation*)
 Install PSProfiler=Yes (*decide if the PSProfiler interface is to be installed*)
 Install PSWizard=No (*decide if the PSWizard interface is to be installed*)
 Install PSObserver=No (*decide if the PSObserver interface is to be installed*)
 Install SNMP=Yes (*decide if files needed for SNMP are to be installed*)
 Install EOFM=No (*decide if files needed for EOFM are to be installed*)
5. In summary, you should now have the following in your **PeerSync Install** folder



6. If you password protected the Profile in Step 1 you need to copy the **PeerSync.PWL** file from the **C:\WINDOWS** directory and paste it in the **Add to Windows Folder**
7. (Optional) Place a copy of the Profile to be distributed in the **Add to Install Folder**
8. Place the Profile shortcut created in Part 1 step 11 above into the **Add to Common Startup** folder. If you saved the Profile created in Part 1 step 9 onto a Network share you do not need place it into the **Add to Common Startup**. See Part 4 below for suggested startup settings when working with centrally stored Profiles

3. USE THE INSTALLATION FOLDER ON THE OTHER MACHINES

1. Move the **PeerSync Install** folder created in Part 2 to a Network location accessible to all the machines in need of the PeerSync installation and configuration
2. Make sure all the above files (from Step 2) stay in the same folder when the installation (Install.exe) file is launched on the other machines. This will assure that the configuration file(s) and the PeerSync shortcut are placed in the necessary directory of the individual's machine
3. Once the Installation Folder has been moved to the Network, install the PeerSync to all the other locations by double clicking on the installation file (install.exe)

4. CENTRAL PROFILE MANAGEMENT

To simplify Profile management we recommend storing the Profile on a central Network location accessible to each workstation/laptop. This allows for a single point of Profile configuration and distribution. However this setup is not suited for laptops which often run disconnected from the network. A workaround would be to create a helper Profile that would kick off at start-up, copy the main Profile off the network and then start it. The following are the recommended steps to accomplish this setup:

1. Begin by distributing a copy of the **Main Profile** created in Part 1 above to all the workstations/laptops. This can be done manually or through a silent installation process as described in Parts 2 and 3 above. This is to ensure that at initial start-up PeerSync will have a Profile to run even if it cannot connect to the network
2. On the workstation/laptop, open the local copy of the **Main Profile**, go to the **File** menu and select **Profile** then **Create Shortcut on Desktop**
3. Now go to **File** → **New** to begin creating the helper Profile:
 - a. The **Source** path would point to the location of the **Main Profile** on the network (we recommend you use the UNC path here)
 - b. The **Target** path would be a location on the local computer. This path needs to be common for all the workstations/laptops (i.e. C:\PeerSync Profiles)
 - c. Only enable the **Scan Job once at start** option in the **Automation** window
 - d. Add the full path of the **Main Profiler** in the **Pre/Post Process** window:
 - i. Right-click on the **Main Profile** shortcut created on the Desktop in step 2
 - ii. Go to the **Shortcut** tab and **COPY** the entire content of the **Target** field
 - iii. Now go to the **Pre/Post Process** window in the helper Profile
 - iv. **PASTE** the content of the Target path into the **After** field

This tells the helper Profile to start its local copy of the Main Profile after it updates it.

- e. Go to the **StartUp/Service** window and check **Add to Windows StartUp**.
Remove any other Profiler shortcuts you may have created in the Startup Folder
 - f. (Optional) If you want to hide the Profiler upon activation of PeerSync go to the **Options/Commands** window, double-click on the **Command Line Arguments** field and replace the **/GL** argument with **/GLS**
 - g. (Optional) To suppress and hide the splash screen at start up for both the PeerSync and Profiler applications add **/H** to list of **Command Line Arguments**
 - h. (Optional) To hide the PeerSync system tray icon uncheck the **Show tray icon** option in the **Options/Command** window
 - i. You may keep the remaining default settings and save the helper Profile to the local computer
4. (Optional) The users will be able to modify the .SNC Profile unless the file is given **Read Only** access. To do so, simply right-click on the .SNC Profile → **Properties** → check the **Read-only** check box in the **General** tab
 5. Distribute the helper Profile manually or using the silent installation procedure described in Parts 2 and 3