

Goals:

- Backup user laptops or workstations to a centralized server/location
- The backup process should auto-start, become minimized/hidden, and password protected after start-up so that the end-users cannot see or change the configuration Profile
- Have the ability to centralize configuration and administration to easily update and monitor the backup process
- Identify ways in which the backup solution can be packaged and distributed to each computer

Requirements:

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

1. CREATING THE PROFILE

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

1. Begin by installing PeerSync™ on one laptop/workstation
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 If you want to create a single generic Profile to be used by all laptops/workstations try using variables in all the path fields throughout the application. The example bellow demonstrates the %UserName% variable which dynamically resolves to the name of the current user that is logged on. You may find a listing of all available variables in our Help Manual.

Example: (specify a user's My Documents source and destination directories)

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

Target - [\\Server\Share\BackUp\%UserName%](#)

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. (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**
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 7 above. To hide the PeerSync™ system tray icon uncheck the **Show tray icon** option in the **Options/Command** window

9. (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**. This method is ideal if you choose to use user variables throughout the Profile as in step 3 above.
10. (Optional) Once you have created the Profile, save it to a **Network** shared drive accessible to every machine you wish to run the Profile on. This way the network administrator can modify the Profile at any time and not have to redistribute it
 - Go to **File** → **Save As** → enter Profile name
 - Follow the steps in Part 2 - 5 below for recommendations on Profile distribution
11. (Optional) The users may 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

2. DISTRIBUTING PEERSYNC™ – Using MSI

PeerSync™ has been tested and proven to work with Microsoft Windows Installer (.MSI) packages. Below are some Microsoft links which provide step-by-step guidelines to creating and distributing programs to users or computers:

<http://www.microsoft.com/technet/prodtechnol/windows2000serv/howto/winstall.mspx>

<http://support.microsoft.com/kb/314934/>

3. DISTRIBUTING PEERSYNC™ - Silent Installations

Alternatively you may use our method for creating silent installations. This requires the construction of an **Installation Folder** which may be distributed or centrally stored for individual access.

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 laptop/workstation you must first gather the necessary files to be installed. Once this has been done simply distribute the **Installation Folder** to all the laptops/workstations 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. Open the local copy of the **Main Profile**, go to the **File** menu, select **Profile**, then **Create Shortcut on Desktop**. You may then close the Profiler.

3. 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 laptop/workstation. 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*

4. 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
- 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
- Give the shortcut an intuitive name (i.e. **Install.exe**) by renaming the shortcut

5. 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

- 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*)

6. In summary, you should now have the following in your **PeerSync™ Install** folder



7. If you password protected the Profile as in Part 1 you need to copy the **PeerSync.PWL** file from the **C:\WINDOWS** directory and paste it in the **Add to Windows Folder**
8. (Optional) Place a copy of the Profile to be distributed in the **Add to Install Folder**. This is to ensure that at initial start-up PeerSync™ will have a Profile to run even if it cannot connect to the network
9. Place the Profile shortcut created in Part 1 step 9 above (from the Start Up folder) into the **Add to Common Startup** folder. If you saved the Profile on a Network share you do not need to place it into the **Add to Common Startup** folder. See Part 5 below for suggested startup settings when working with centrally stored Profiles

4. DISTRIBUTE THE INSTALLATION FOLDER

Below are the steps for distributing PeerSync™ to all the laptops/workstations when using the Silent Installation mechanism:

1. Move the PeerSync™ **Installation Folder** created in Part 3 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 3) 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 Profile shortcuts are placed in the necessary directory of the individual's machine
3. Once the **Installation Folder** has been moved to the Network, install PeerSync™ to all the other locations by double clicking on the installation file (Install.exe)

5. CENTRAL PROFILE MANAGEMENT

To simplify Profile management we recommend storing the main Profile on a central Network location accessible to each laptop/workstation. We also recommend creating a Helper Profile to be distributed with each PeerSync™ instance. The purpose of the Helper Profile is to start-up when the user logs on, download and maintain a local copy of the latest Main Profile from the Network location, and starting the Main Profile. This two step process will ensure that each user has the latest version of the Main Profile locally before starting the backup process.

The following are the recommended steps to accomplish this setup:

1. Create 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 laptops/workstations (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 in Part 3 step 2 above and select **Properties**
 - 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
 - j. (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
 - k. Distribute the Helper Profile manually or using the silent installation procedure described in Parts 2 and 3
2. Be sure to distribute a copy of the **Main Profile** created in Part 1 to all the laptops/workstations. This is to ensure that at initial start-up PeerSync™ will have a Profile to run even if it cannot connect to the network