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Silverback by Matrix42

Silversync Migration Guide Version 5.0 U2

Version 5.0.2.14

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1. Introduction

1.1. Overview

As of Silverback version 5.0 Update 2, there has been substantial changes to the Silversync module. The legacy Silversync is no longer supported and has been replaced by a Silversync service which can be installed remotely. Silversync servers are now managed completely through the Silverback admin console rather than its own website.

There is no automated upgrade for existing Silversync customers to move to this version, because the architecture is so different.

The purpose of this document is to guide existing Silversync customers through the process of upgrading to this new version, and keeping the content synced for their users.

Please read this entire document fully before commencing the upgrade so the process is clear to you.

The following assumes you will be performing the new Silversync installation on the same Silversync server you had previously. Installing it on a new, separate server will also work, but this would be considered a fresh installation, so refer to the Silversync Installation guide for this. This would include important other steps such as SSL certificates and DNS entries.

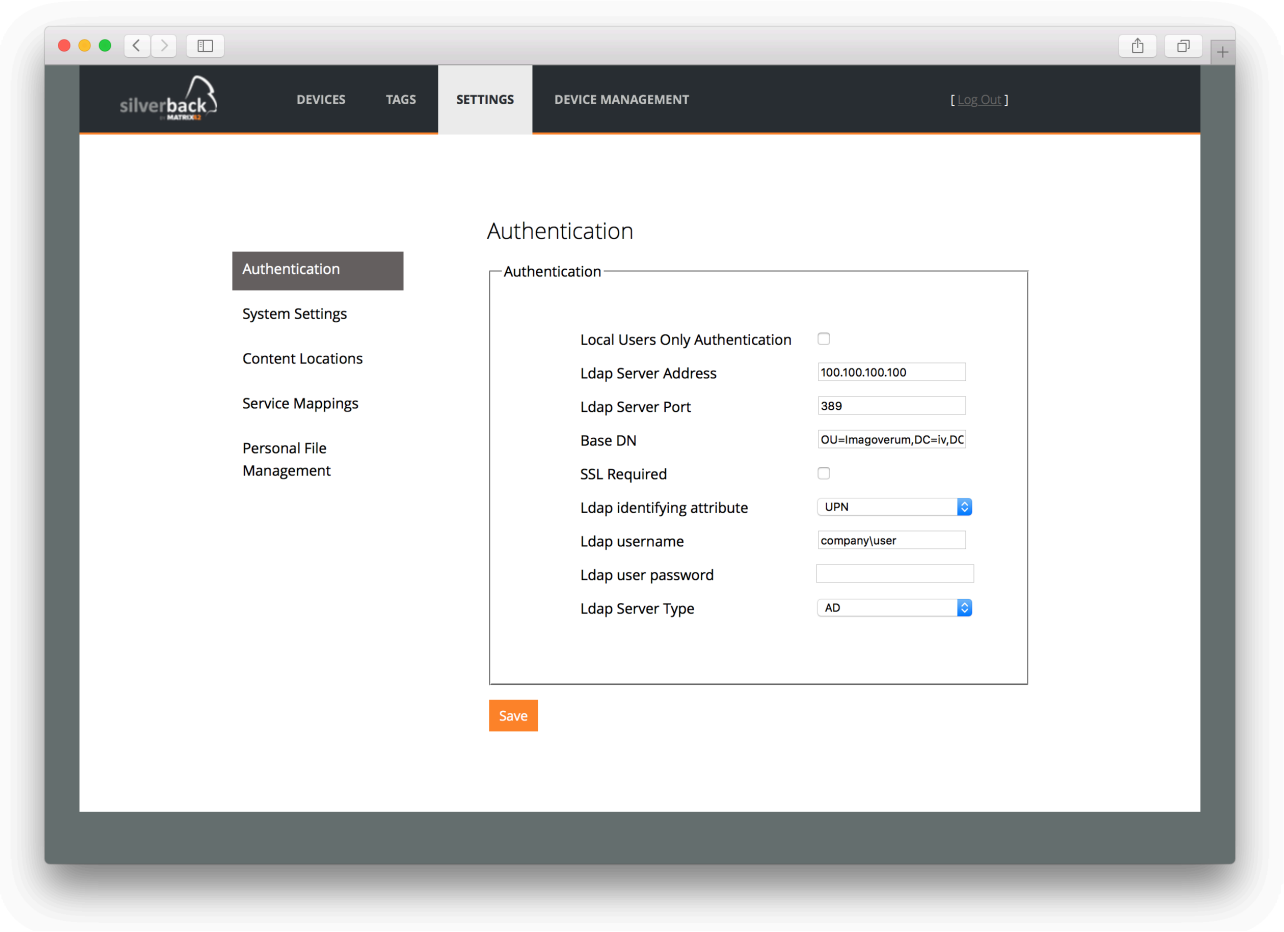
2. Pre-Upgrade Information Gathering

Because there is no direct automated upgrade, you will need to re-create this in the new Silversync. It's important to gather the current Tag and folder assignment from Silversync so you can re-create this exactly how it should appear.

2.1. Silversync Settings

The Silversync settings for a server are now configured in the Silverback console. These settings are largely the same, with the exception of some removed items, such as App Fabric.

Log in to your Silversync admin console and click on Settings. The authentication Tab should open first, record all of these settings and ensure you have the password for the LDAP user handy if you are using this:



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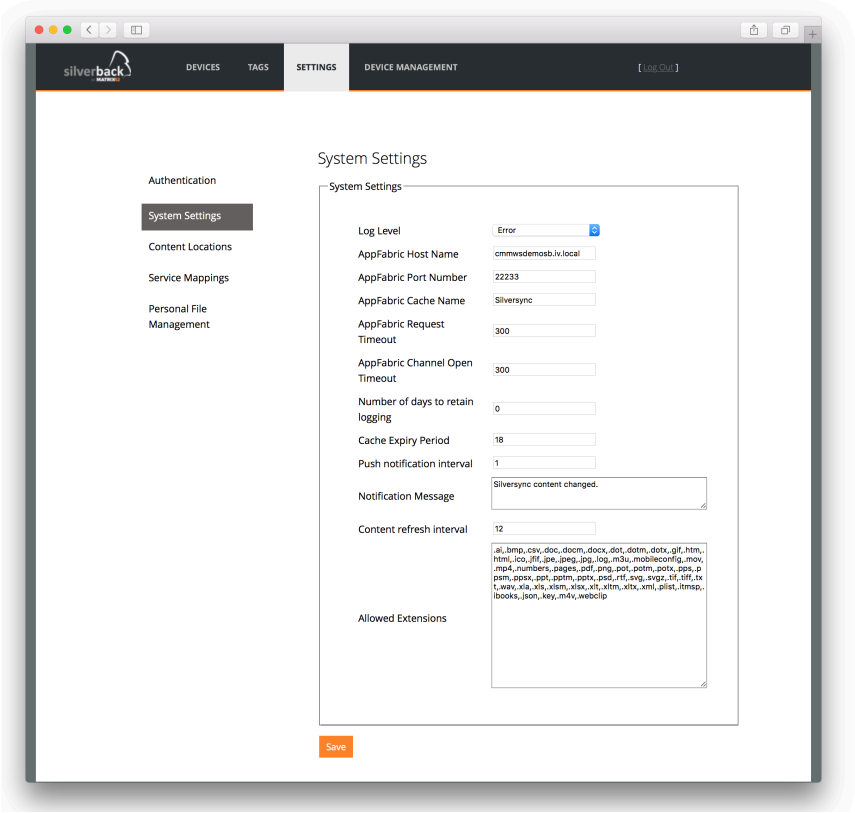
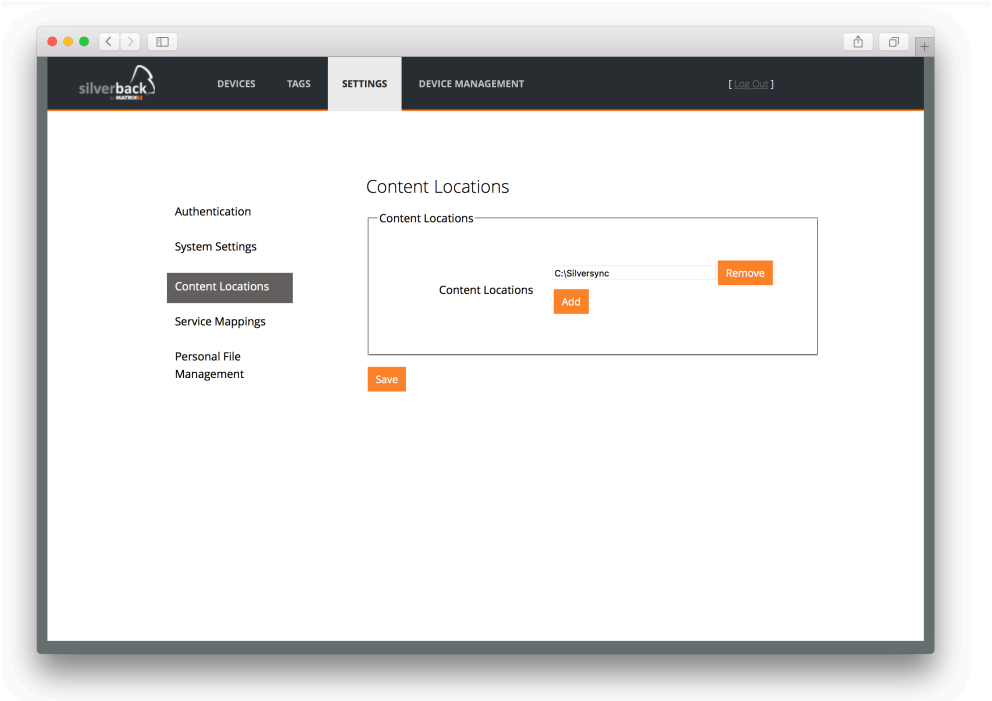
Next click on the System Settings Tab. Record all of the settings on this page, except for the AppFabric settings as this is no longer used in the new Silversync:



Next click on the Content Locations Tab and record all of the current content locations specified. Typically, there will be only one, but if there are multiple, record them all:



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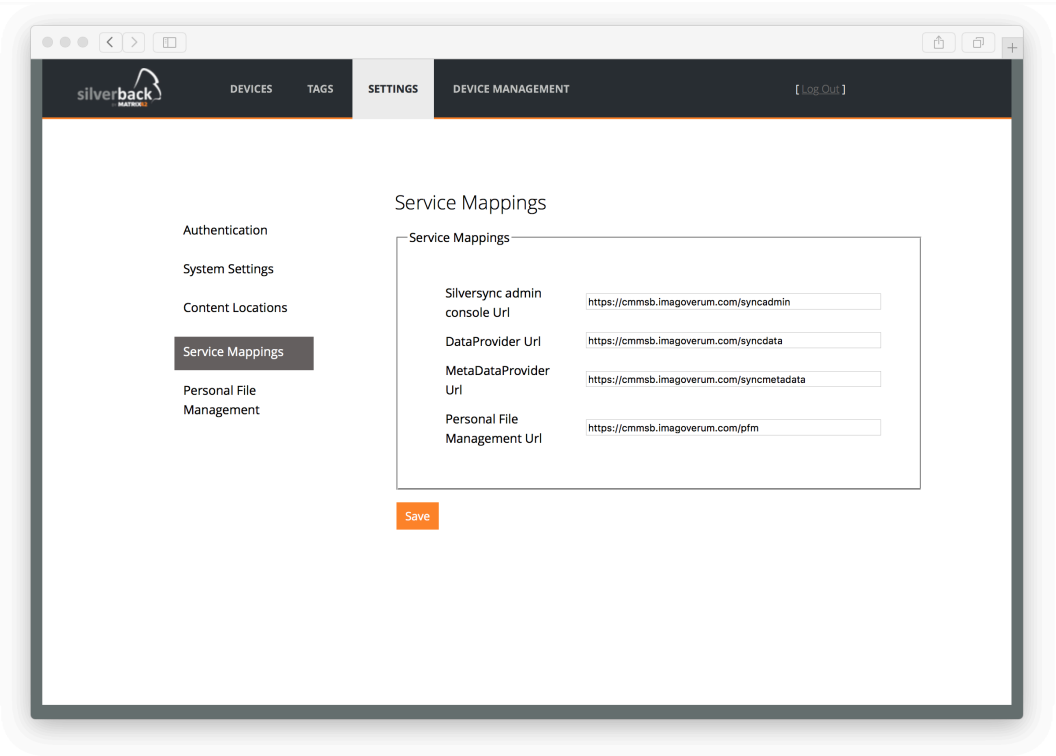
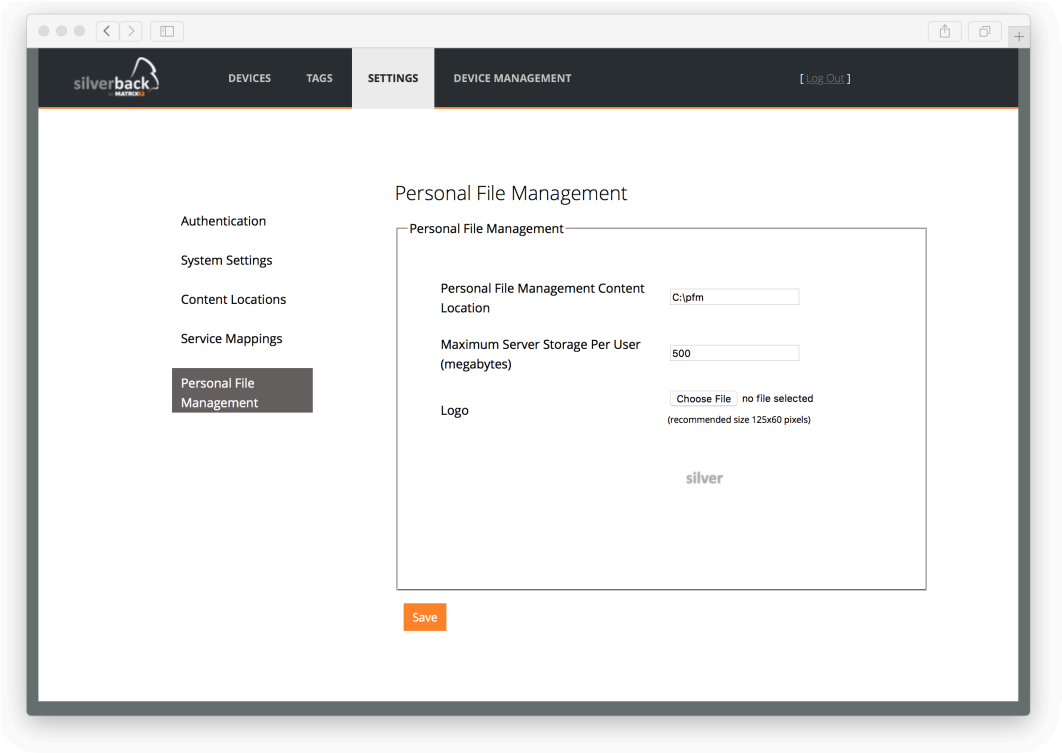
Next click on the Service Mappings Tab and record the URLS configured:

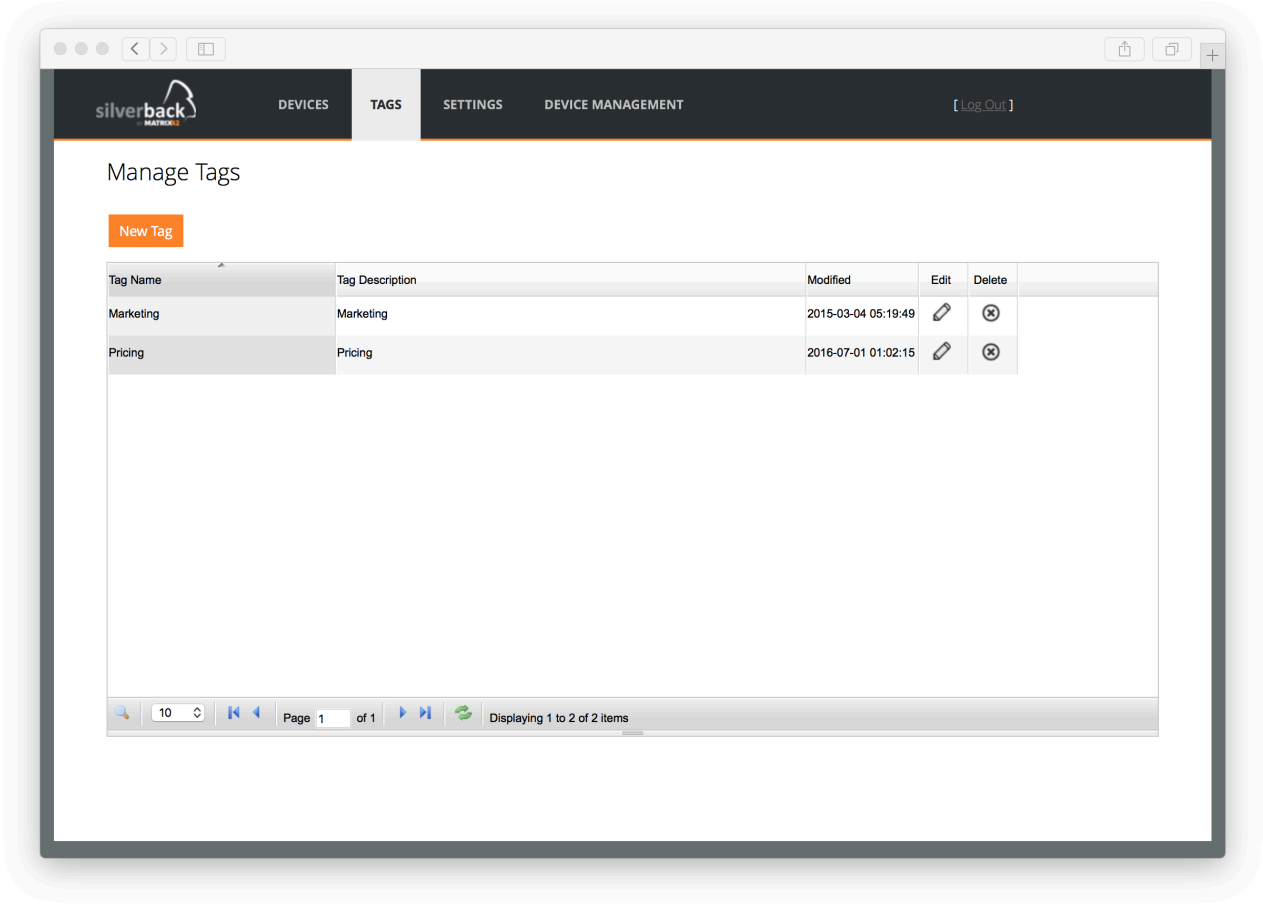


Finally, if you are using Personal File Management, click on that Tab and record the settings. Note – If you don't use PFM currently, you can skip this step:



2.2. Silvsersync Tags and Folders

The next critical thing to record, is the current Tag and Folder layout. This will be translated to Silverback Tags for your users. Click on the Tags Tab from the top menu. From this page you will see all of the content Tags configured in your system.



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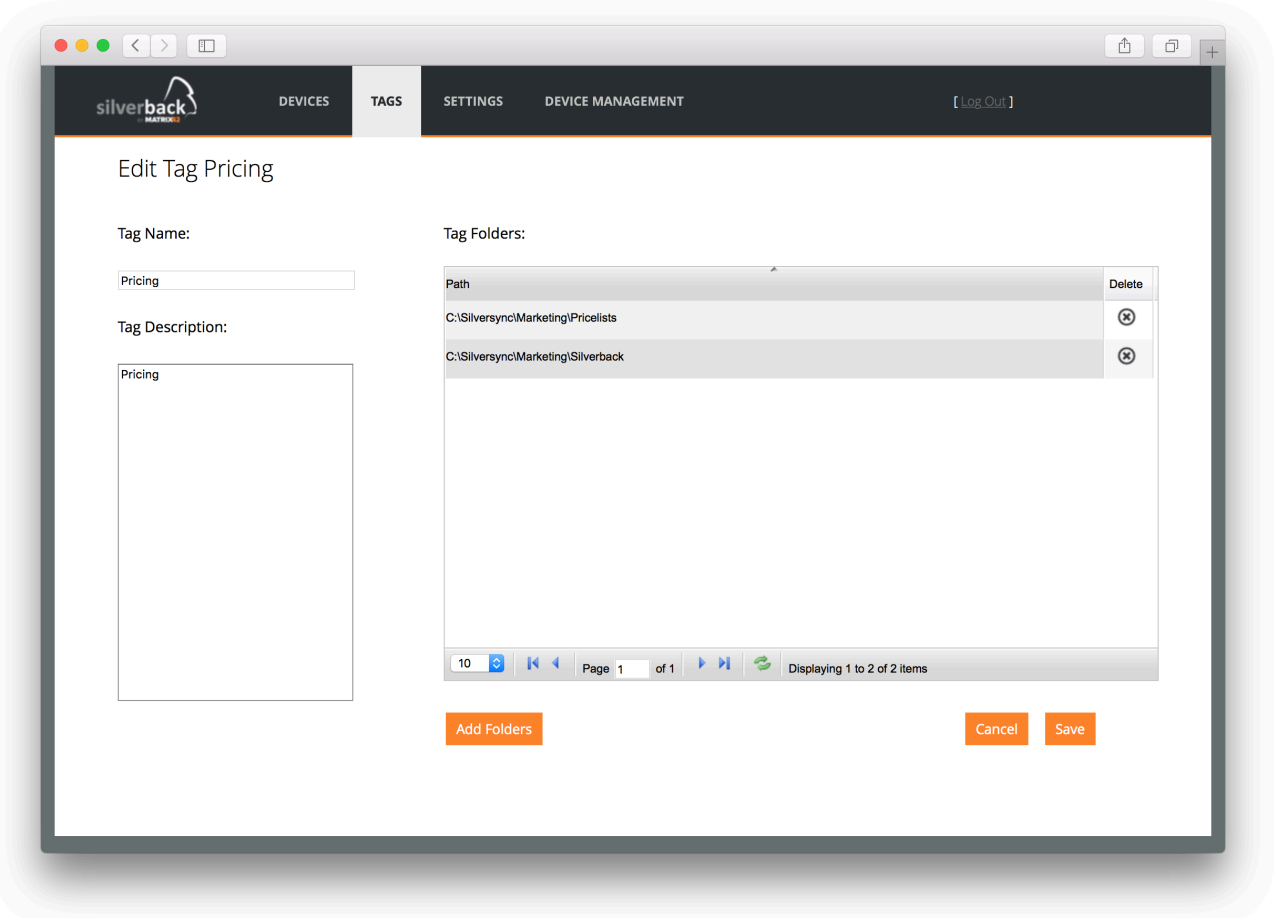
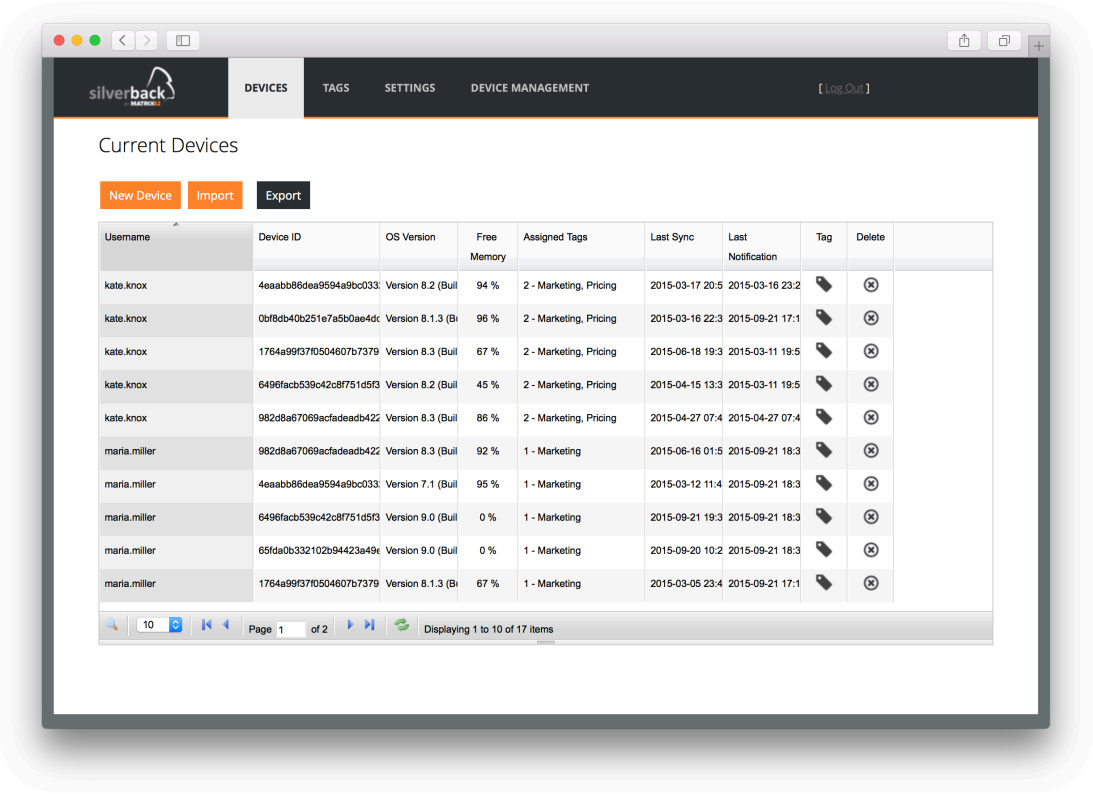
For each content Tag, click Edit and Record the Tag Name, and the Tag Folders. Take care that if there are multiple folders you record all of these. A CSV format is one easy way to do this, in the examples above and below, the recorded data would look similar to this:

```
Tag Name, Tag Folder
Pricing, C:\Silversync\Marketing\Pricelists
Pricing, C:\Silversync\Marketing\Silverback
Marketing, C:\Silversync\Marketing
```

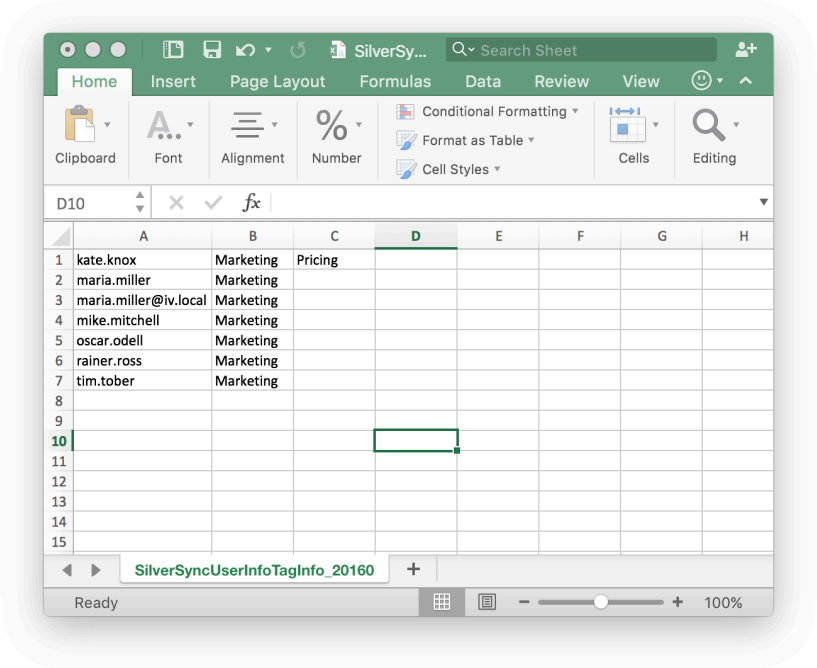


2.3. Silvsersync Users and Assigned Tags

Next we will get a list of users and their assigned Tags from the system. This is simple because the console gives you the option to export this information. Click on the Devices Tab from the top menu, and then click Export:



This will download an Excel file which simply lists Users and Tags. The Tags in this list will match the Tags we recorded in the previous step. In this example, all of the users have “Marketing” and the user kate.knox also has the Pricing Tag assigned.



2.4. Nominate Test Devices

This step is optional, but recommended. We suggest that you find one or two devices in your current system that you can use to verify the migration was completed. These devices should be synchronising with Silversync in the old version without any issues. After the upgrade these will be the first devices you test with to verify.

2.5. Upgrade Silverback

The final step in our preparation is to upgrade the Silverback component first. This process is separate to the Silversync upgrade/migration and should be completed separately now.

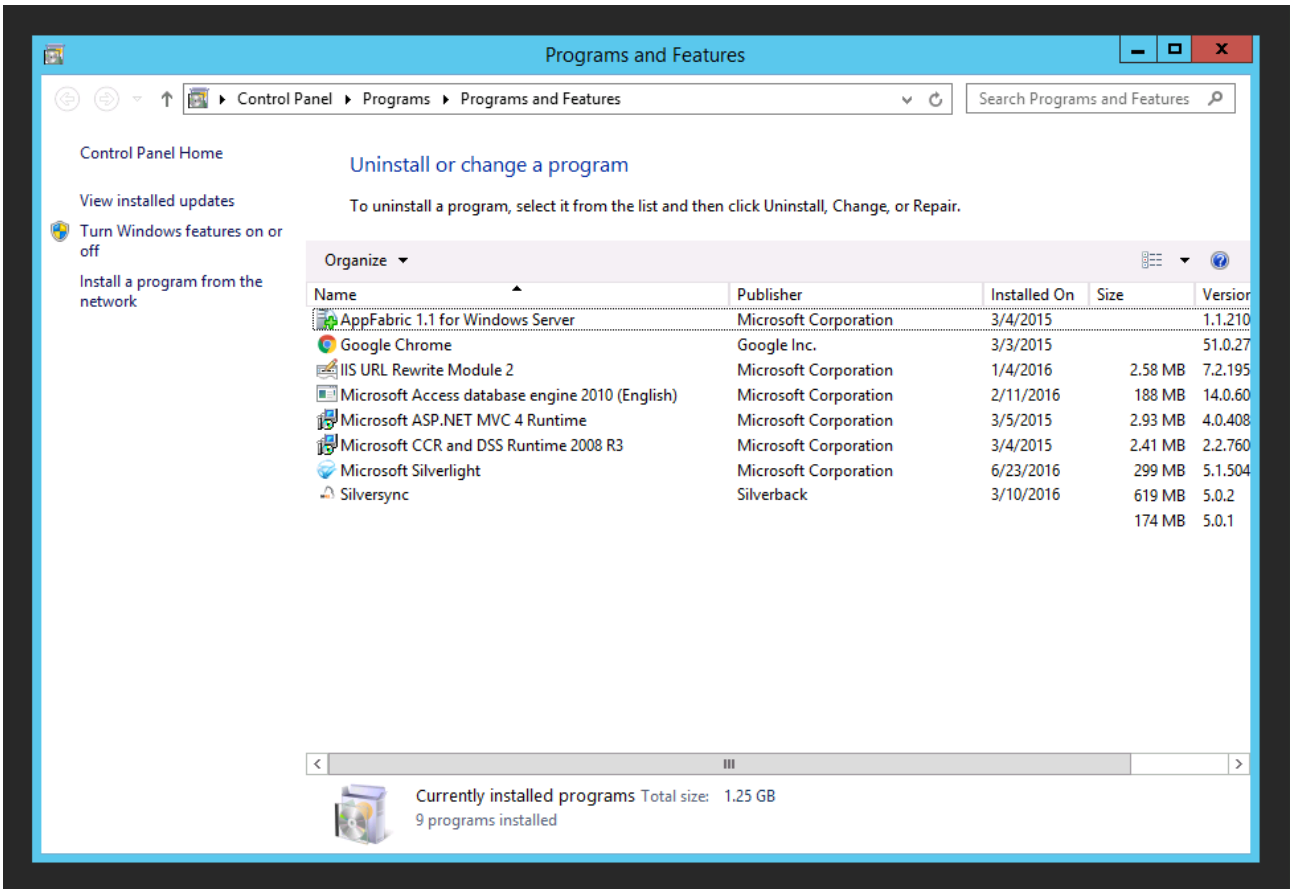
3. Installation

The following assumes you will be performing the new Silversync installation on the same Silversync server you had previously. Installing it on a new, separate server will also work, but this would be considered a fresh installation, so refer to the Silversync Installation guide for this. This would include important other steps such as SSL certificates and DNS entries.

3.1. Uninstall Silversync

This is as simple as using the native Windows method to uninstall programs.

First, launch the Programs and Features app which will be used to uninstall Silversync:



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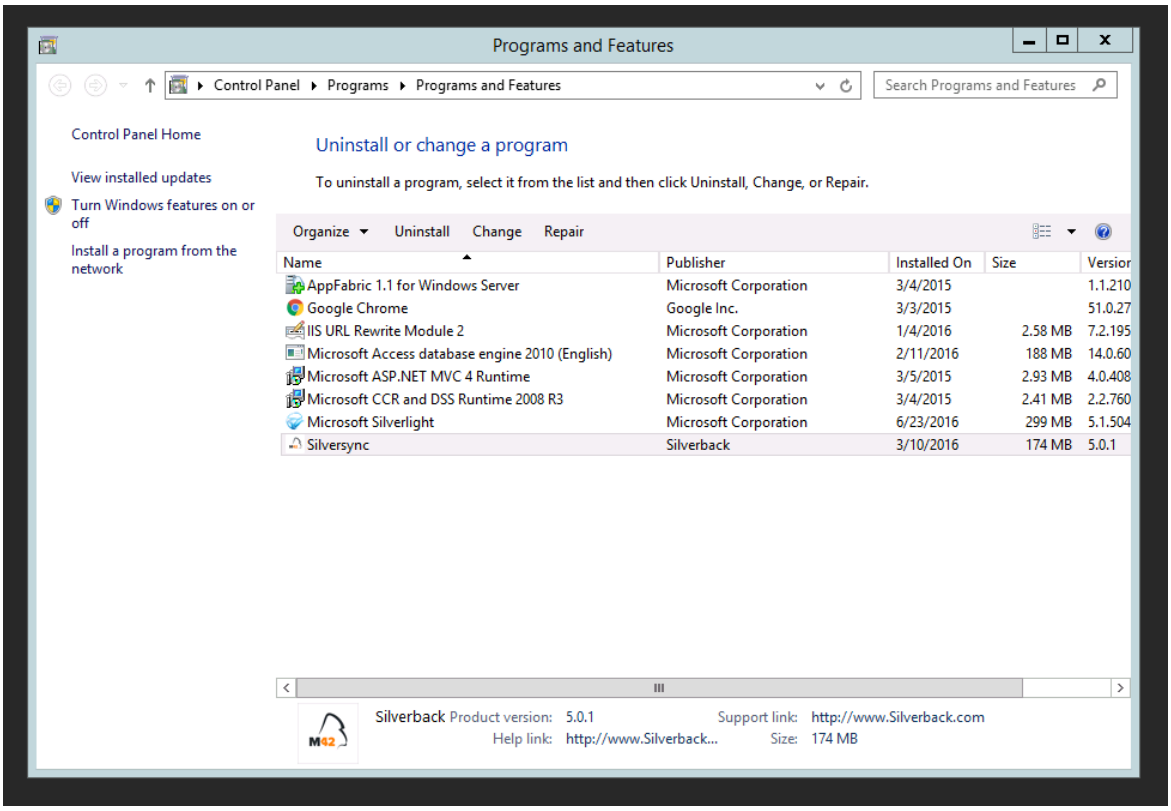
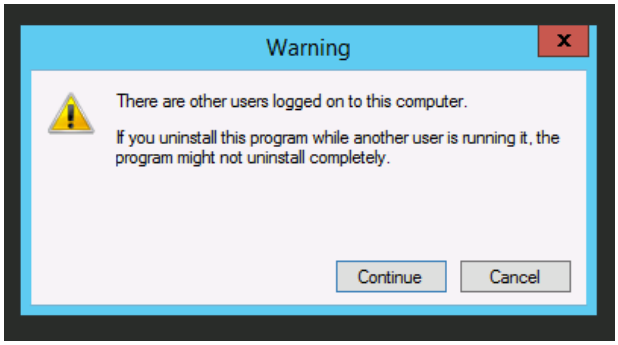
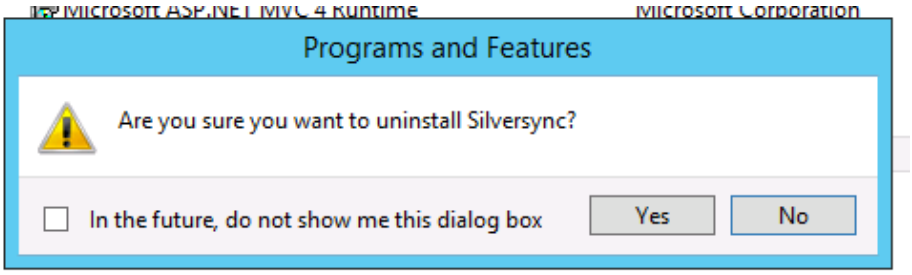
Click on Silversync and then click “Uninstall”:



If you receive a warning about logged in users, you can accept this by clicking Continue:



If you are asked to confirm, click Yes:



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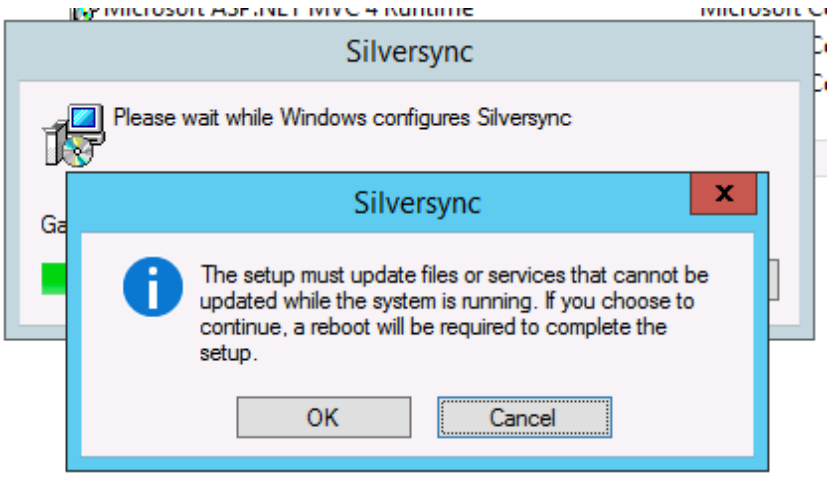
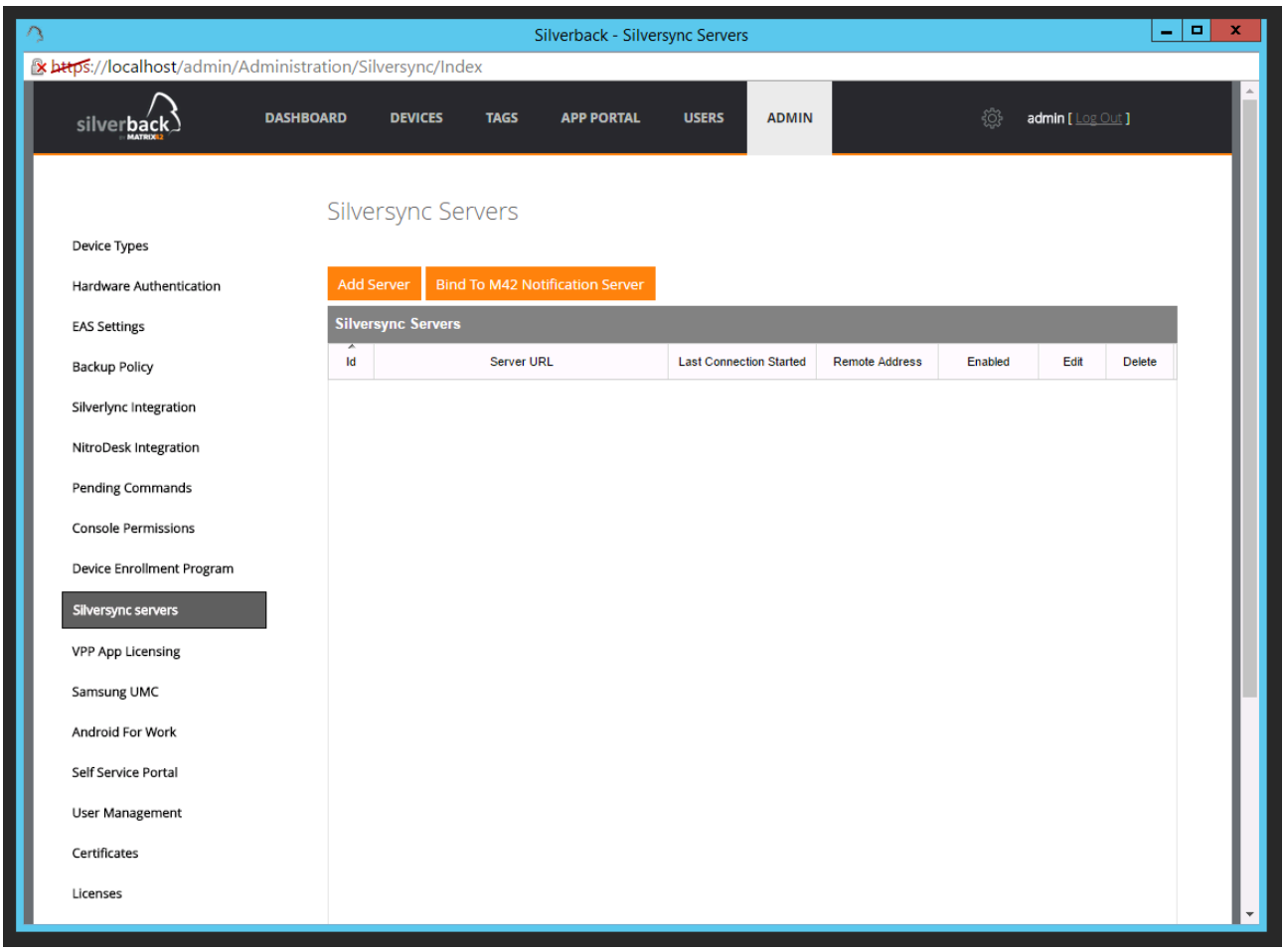
Follow the typical uninstall prompts to complete. If you see a warning about a required reboot this can be ignored, click OK:



After this is complete, Silversync should be removed from your system, and you can now continue with the Installation.

3.2. Add the Silversync Server

Silversync servers are now managed via Silverback in the admin console. Log in to your Admin console, click the Admin Tab, then click Silversync Servers. You should be at the following screen:



This screen is where Silversync servers are now managed. Adding a Silversync server is much easier, and the installer will come directly from the Silverback admin console.

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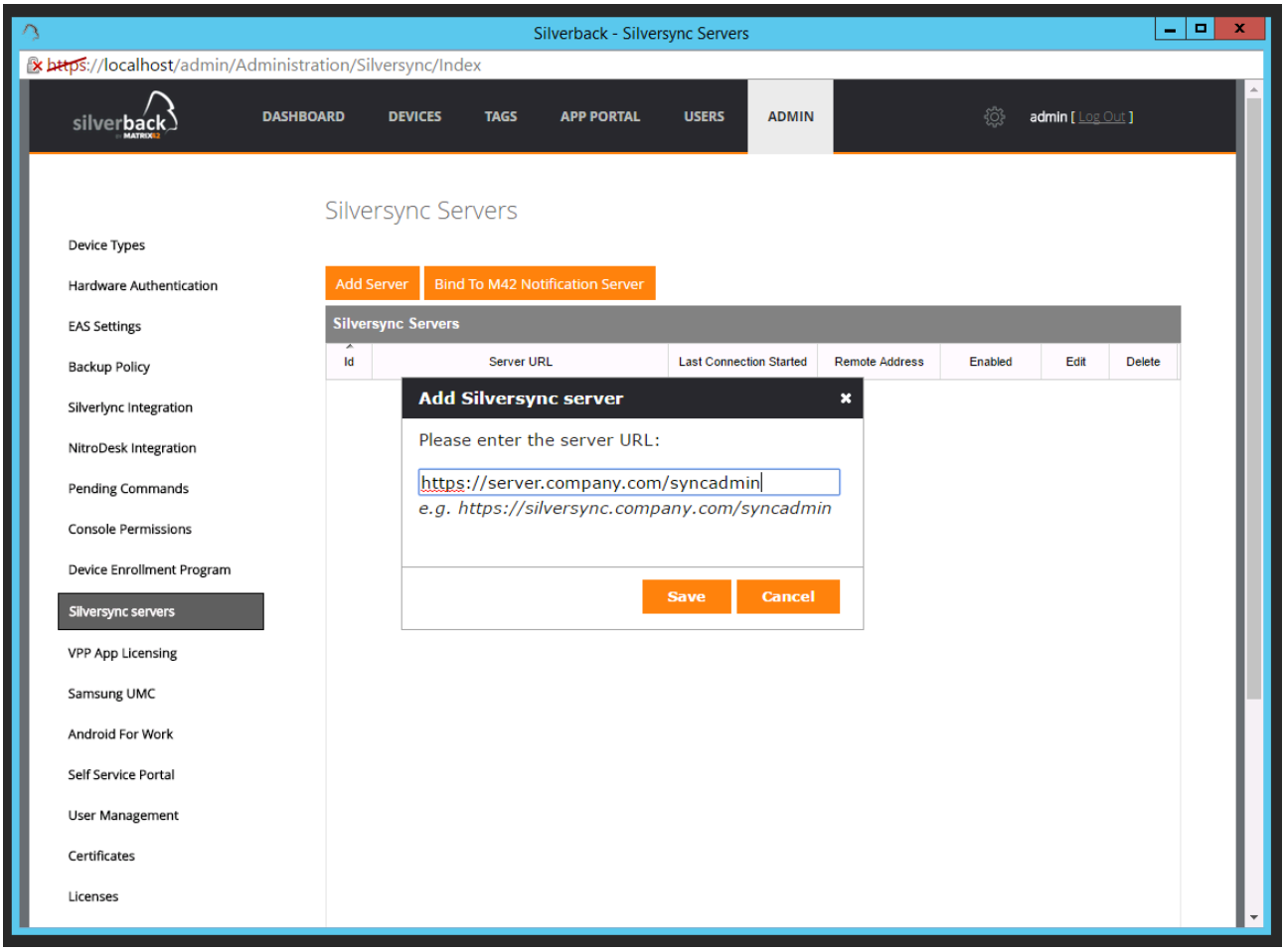
Click Add Server and you will see the following prompt. In this text box enter the Silversync server address. This is the address that users will synchronise to. You should ensure you follow the example URL, by adding https:// to the start, and "/syncadmin" to the end. Finally, click Save.



After the server is saved, you will be presented with the Add Server page. This contains all the needed information to configure Silversync on your server. Follow the steps by first downloading the installation file (click the download link), and copy the server token.

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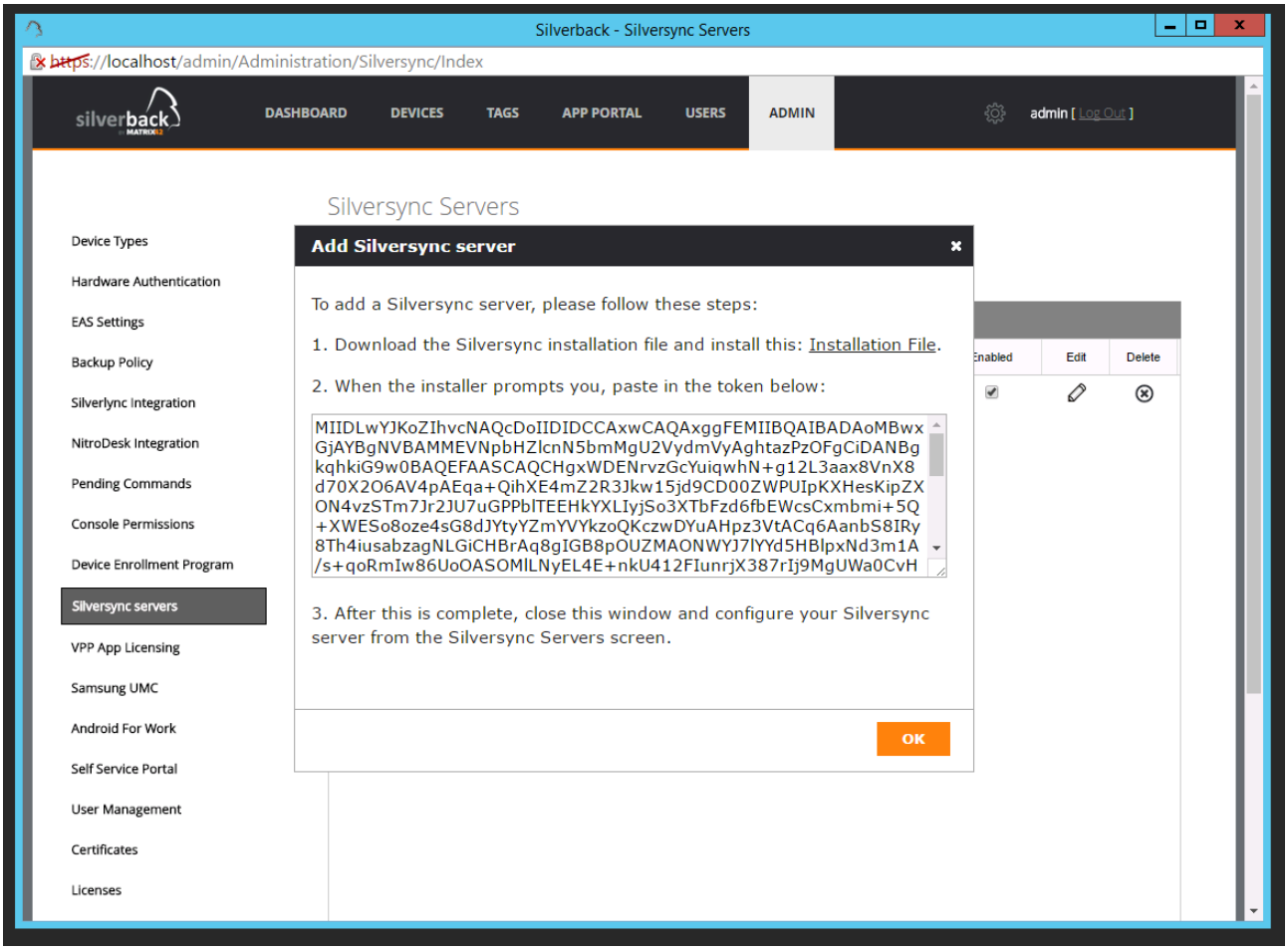
The installation file needs to be copied to the Silversync server, and the Token should be recorded at this point. The token is what will bind your new Silversync server to this Silverback server:

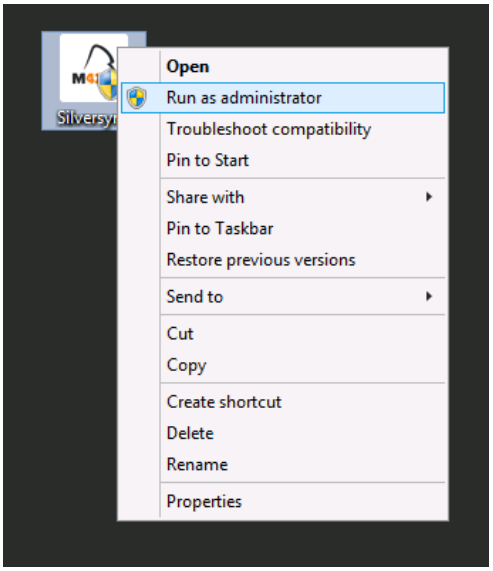


Before proceeding make sure that:

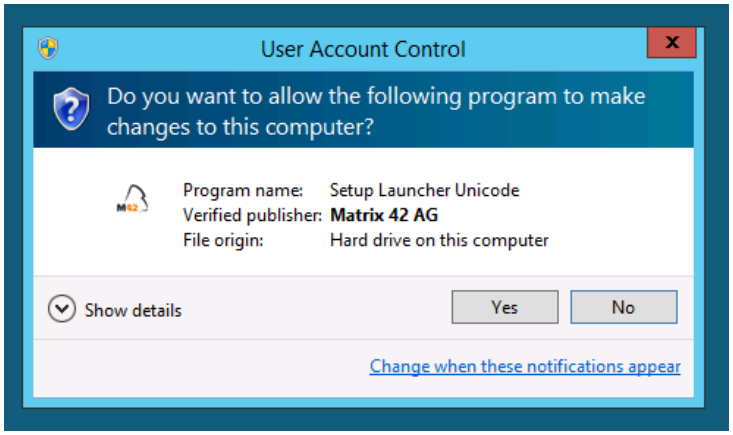
- You have the Silversync installation file on the intended Silversync server.
- You have copied the token; this is needed when you run the Silversync installer.
- You have a local administrator account on the server you are installing

3.3. Install Silversync

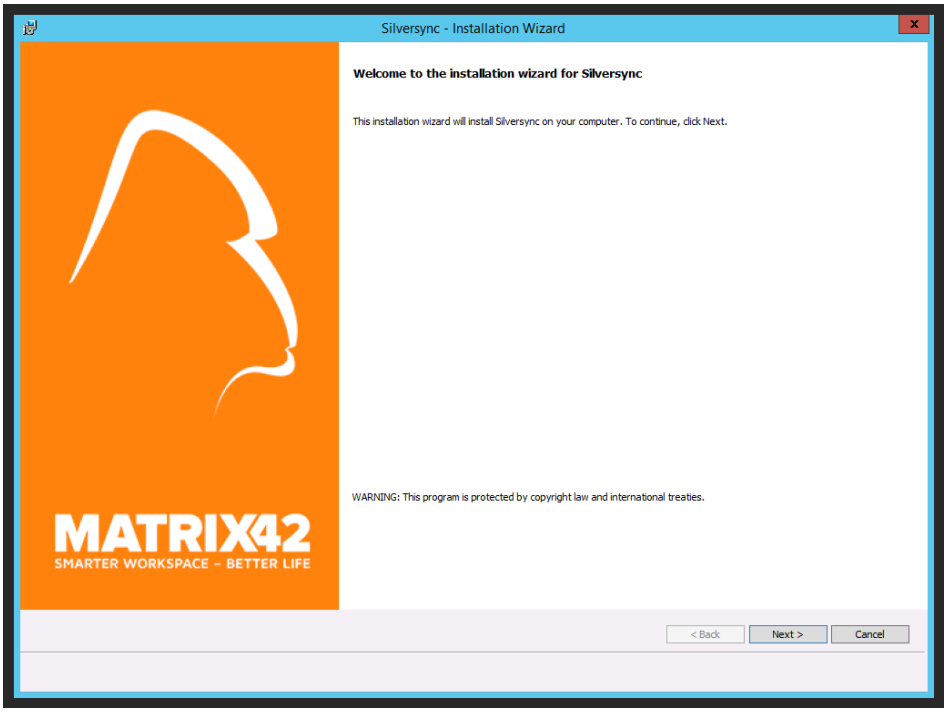
Ensure you are logged into the Silversync server as a Local Administrator, and launch the installer with the “Run as administrator” option:



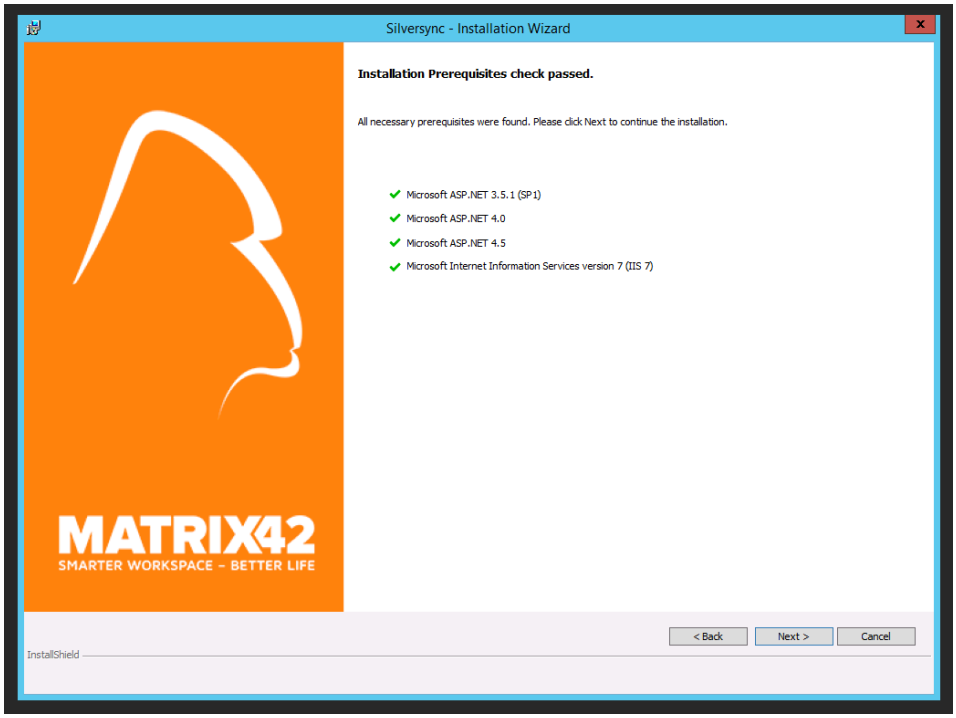
Accept the User Account Control prompt:



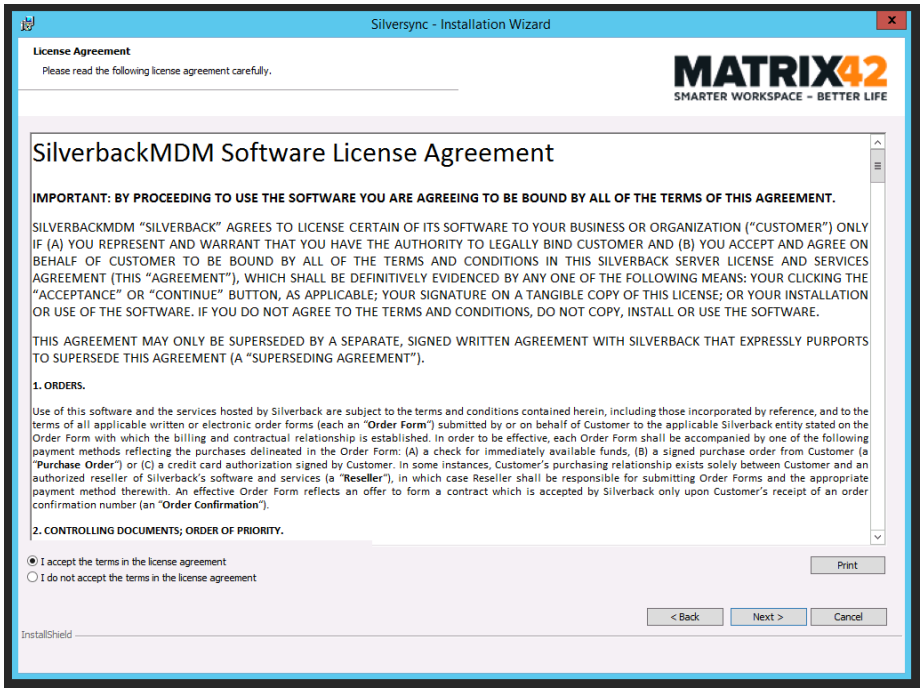
When the installer launches, follow the prompts to install. First, click Next:



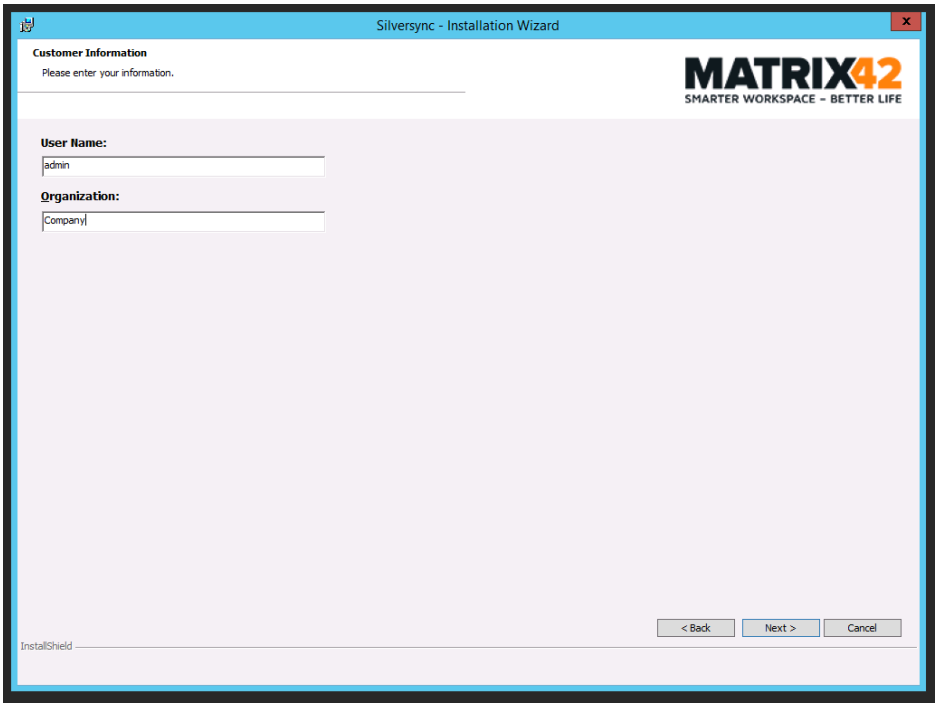
Confirm the required components are installed, and click Next:



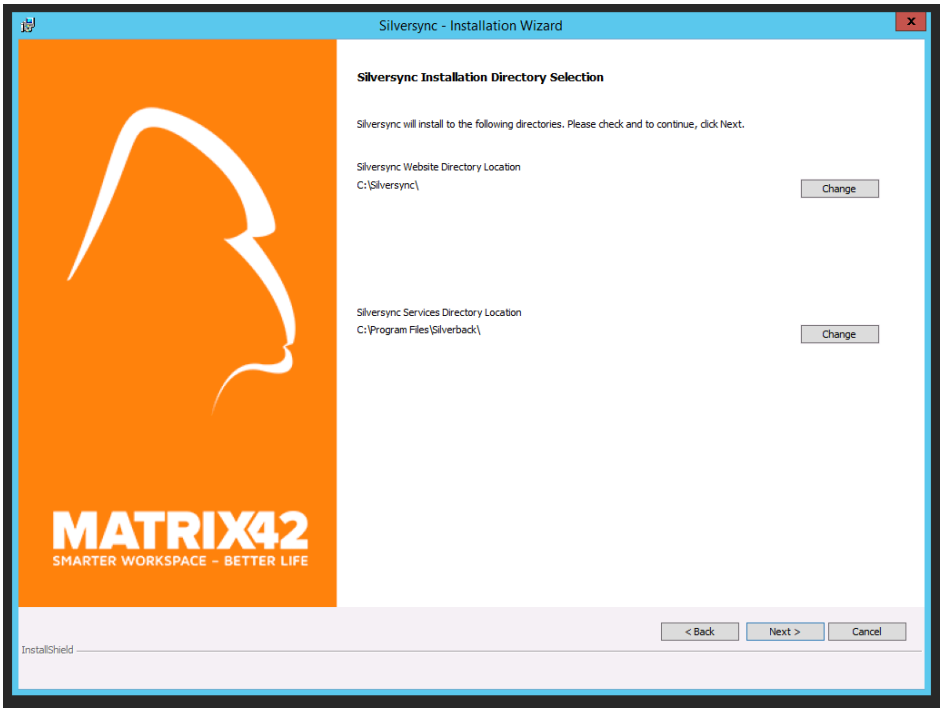
Accept the license agreement and click Next:



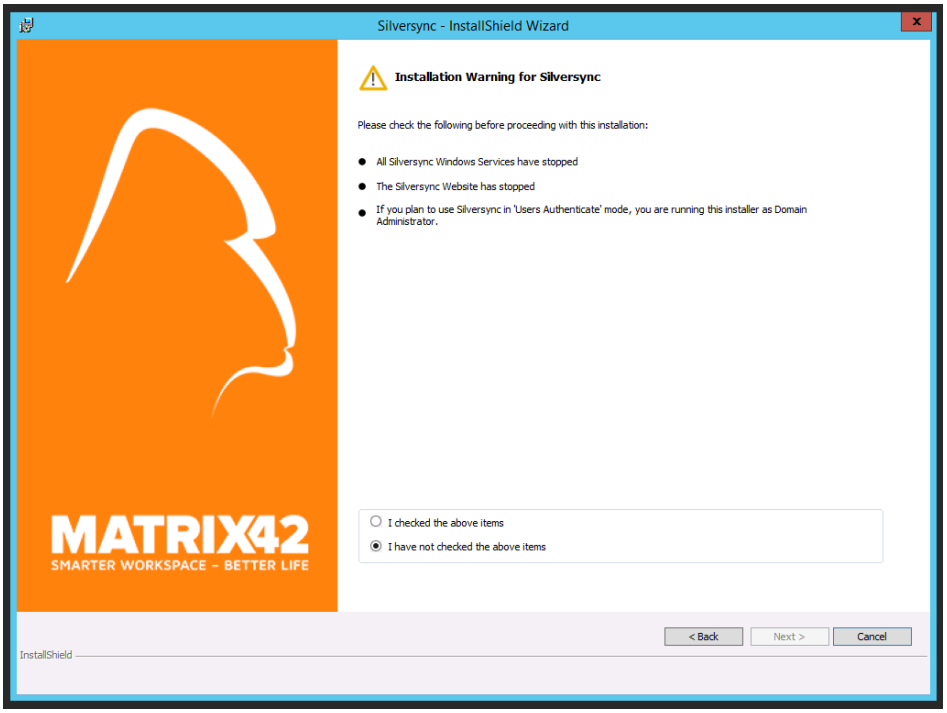
Enter your company information (this can be left default and is for Windows informational purposes only) and click Next:



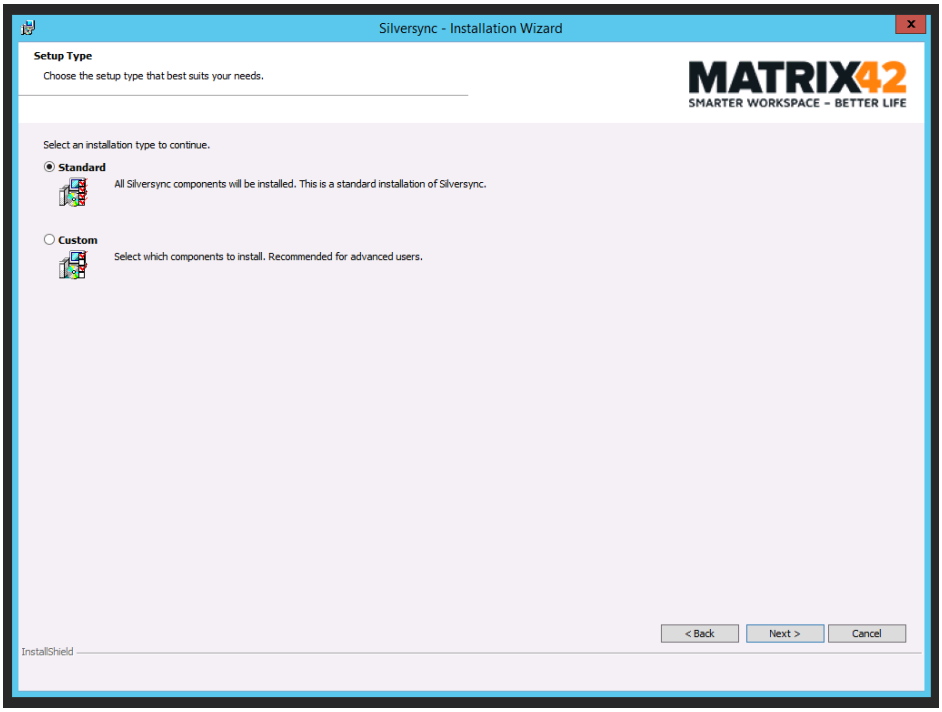
Confirm the Installation locations and change if needed, click Next:



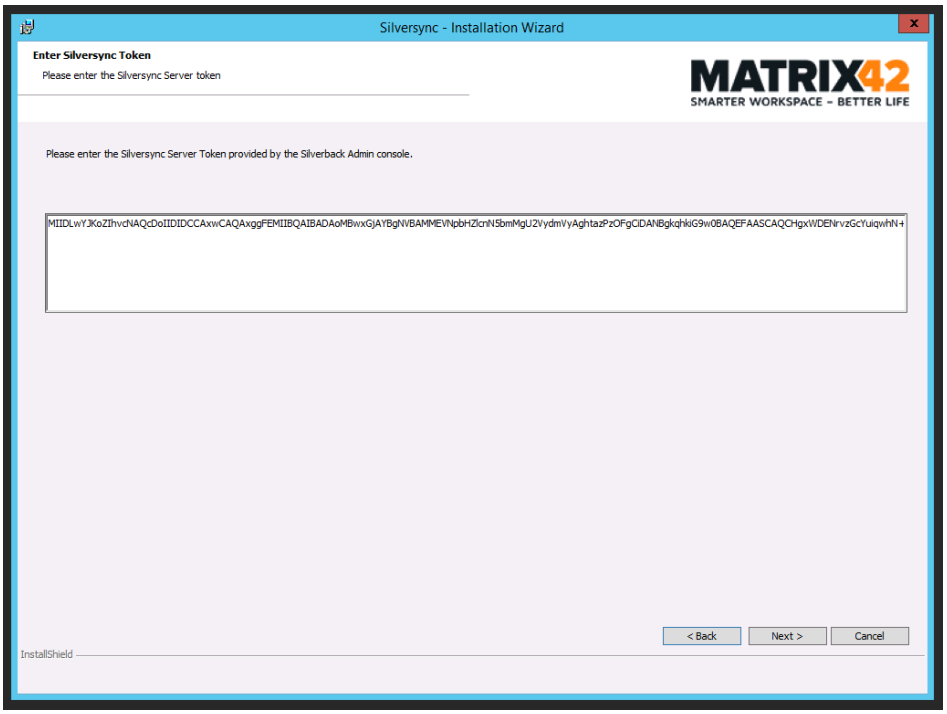
On the following screen, we have already removed the existing Silversync, so these warnings can be ignored. Select the “I checked the above items” option and click Next:



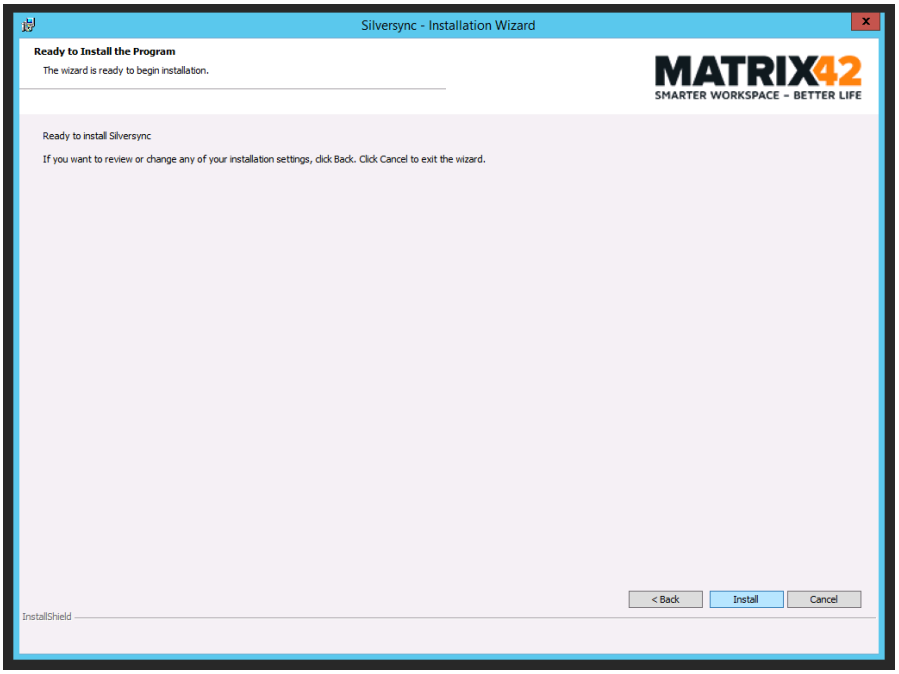
Select Standard and click Next:



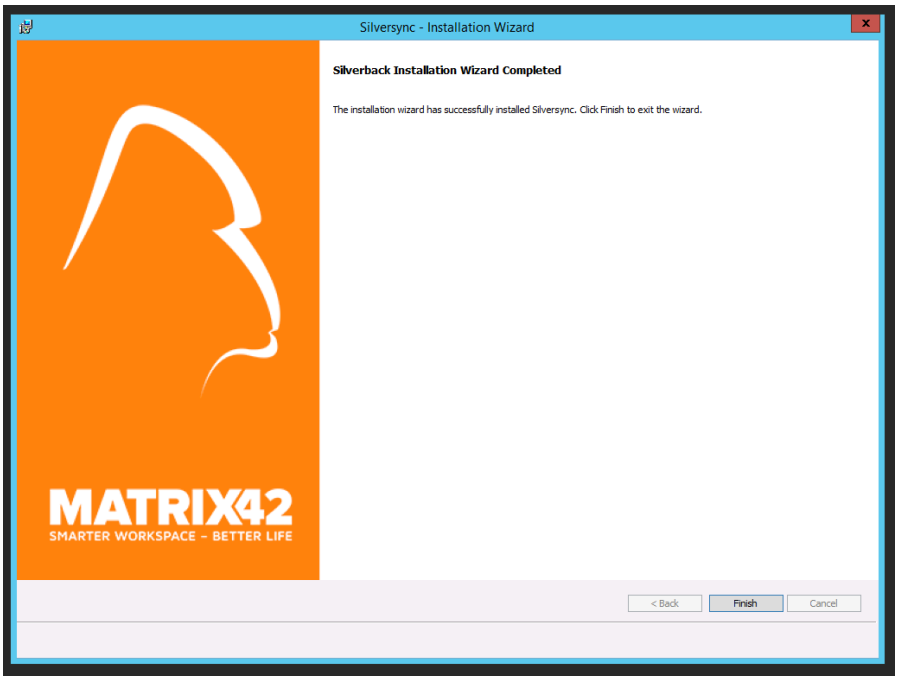
Paste in the Token you recorded from the Silverback server into the text area and click Next:



Your installation is ready at this point, click Install:

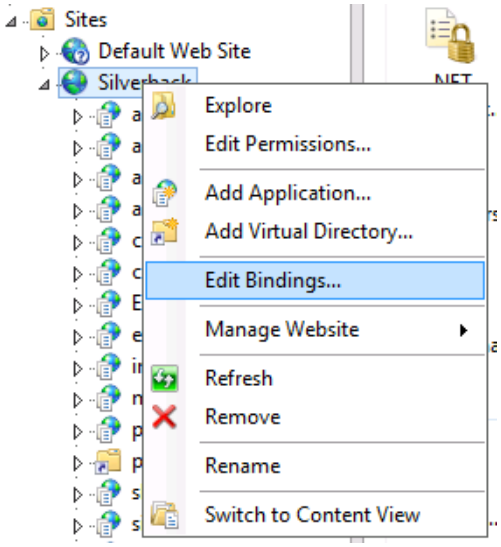


Wait for the installation to complete, and when it does, click Finish:

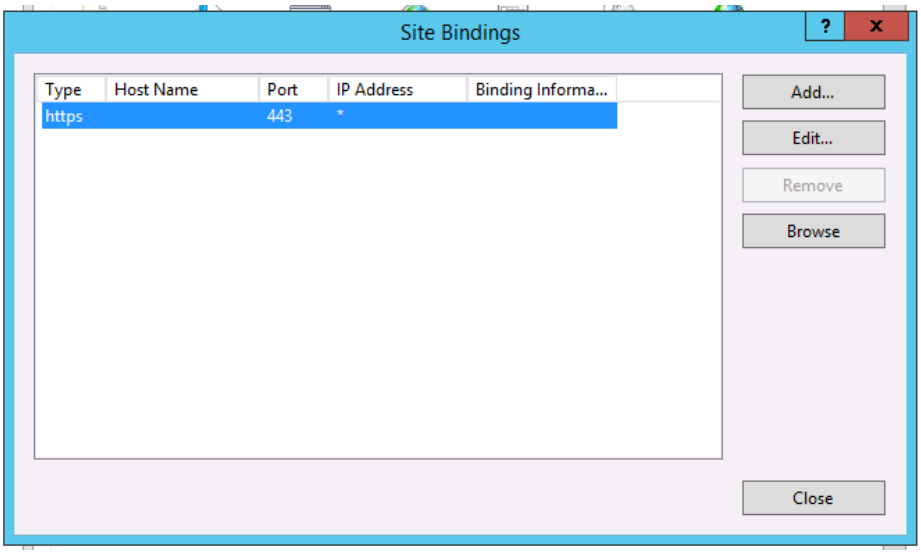


3.4. Configure SSL

After the installation process is complete, launch the IIS program on your Silversync server and navigate to the Silverback website. Right click on this and select Edit Bindings:



There should be an entry for https, select this and click Edit:



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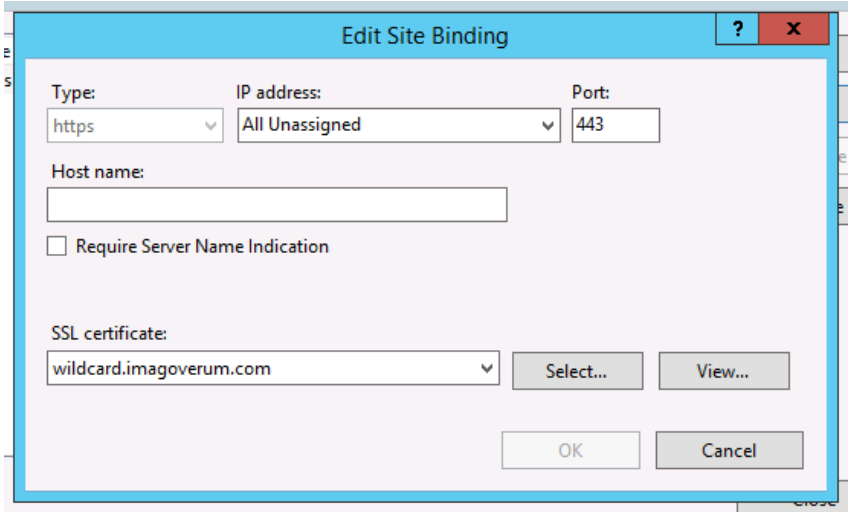
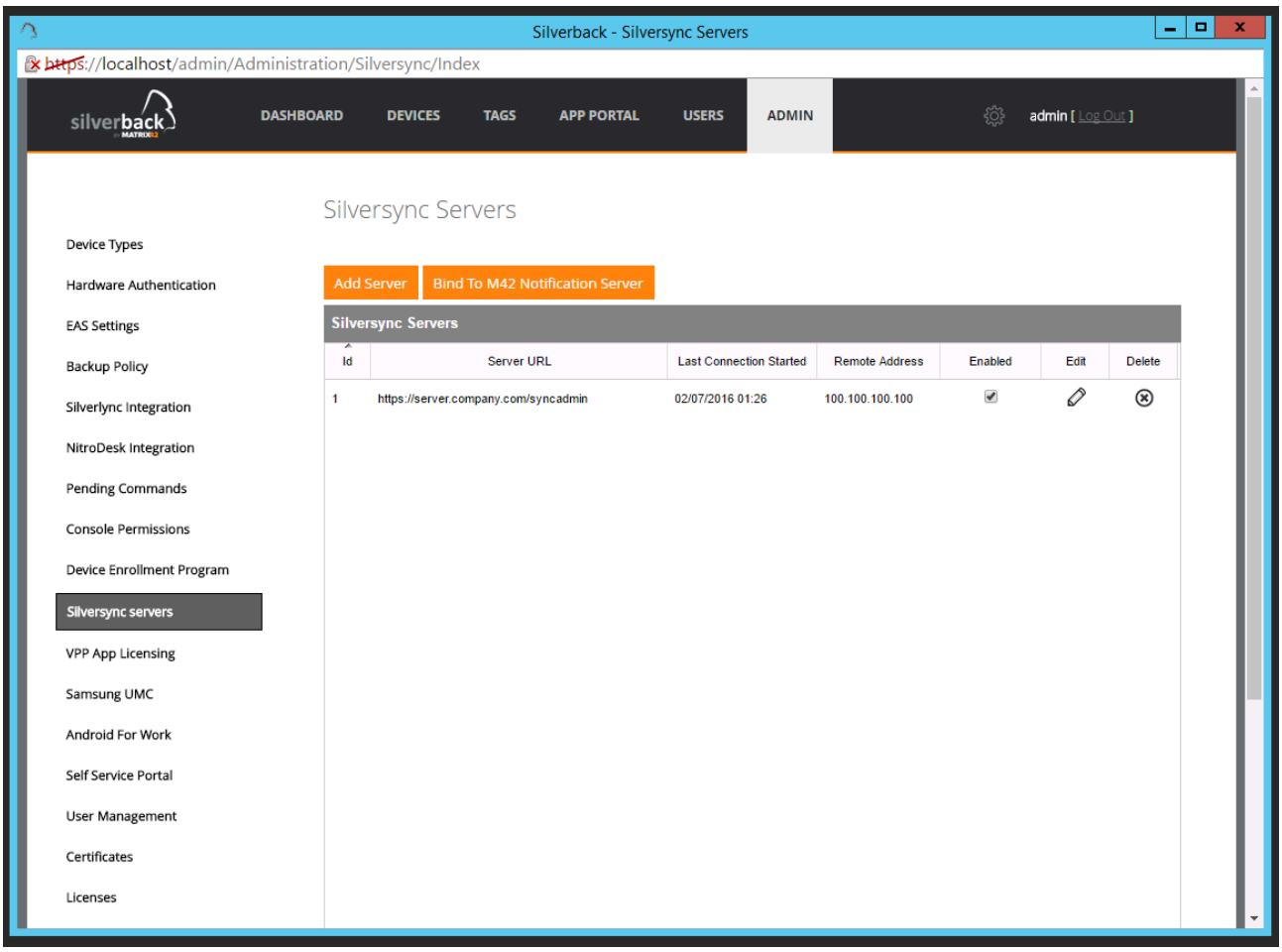
From the following screen, select the SSL certificate for the Silversync website. This should be trusted by devices, and in most cases if you had a previously functioning Silversync installation, you should select the same certificate:



3.5. Configure Silversync

Navigate back to your Silverback admin console, to the same Silversync Servers section you were in previously. You should now see a Silversync server registered in the list. If you do not, refresh the page:



On this page you should see the server URL you previously entered, and also a Last Connection and Remote Address field populated. If these are blank you should first try refreshing the page. If they are still blank after this, then its likely that the Silversync server can't connect to your Silverback server. Ensure that port 443 from your Silvsersync server to your Silverback server is open and not being blocked by any firewalls.

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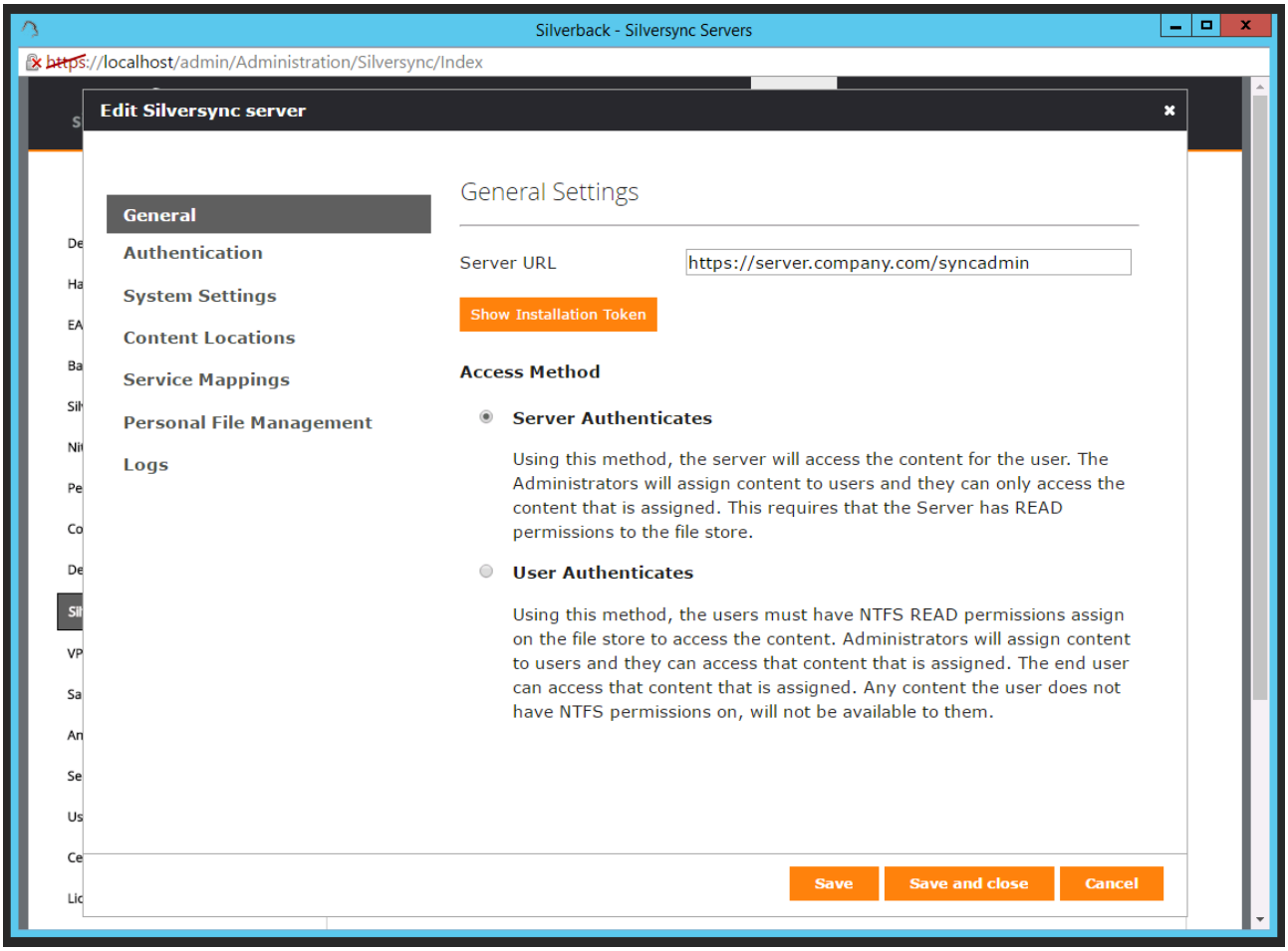
Click Edit on your server and you should see the General Tab:



Ensure that “Server Authentication” is selected.

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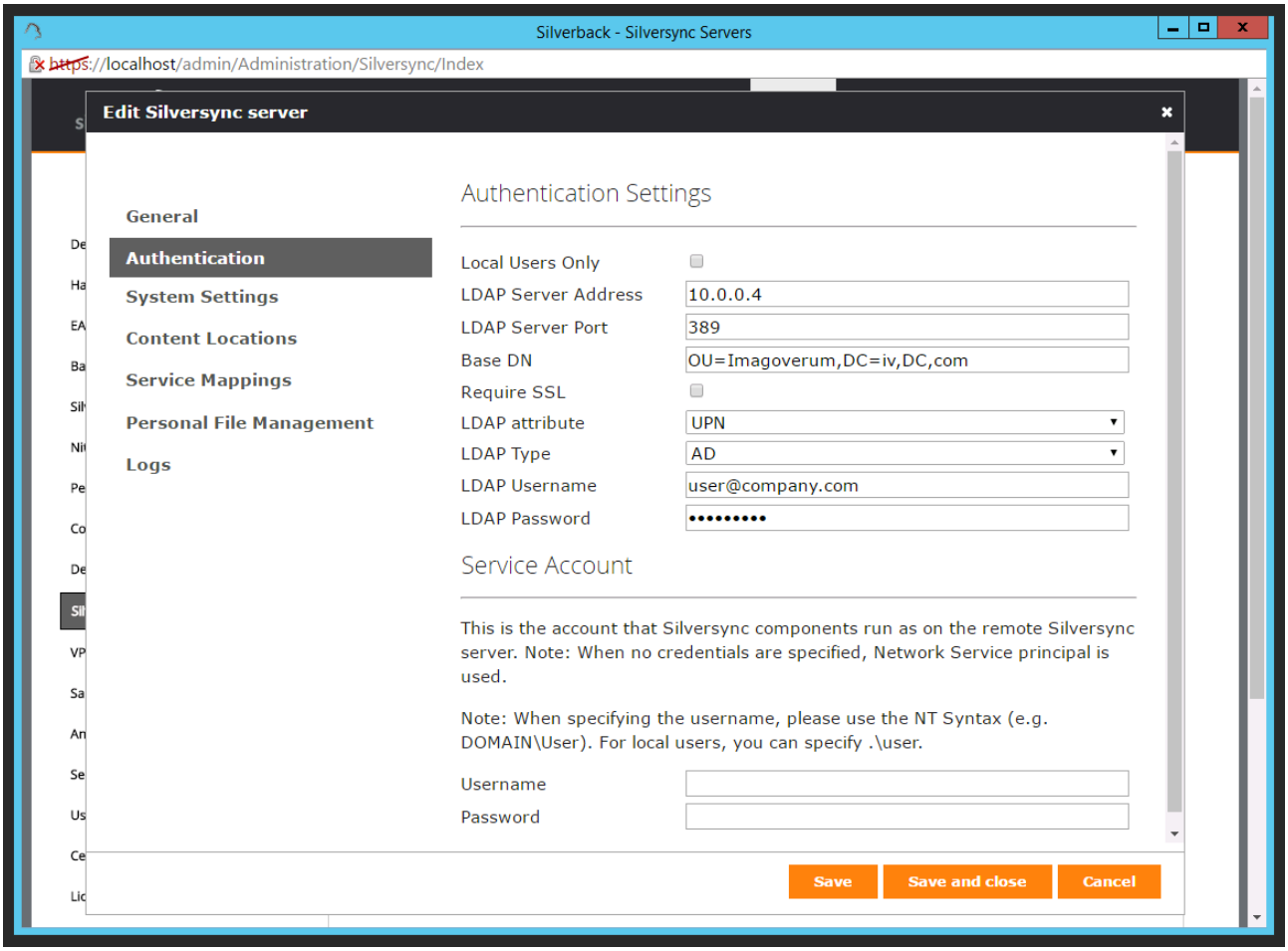
Click the Authentication Tab from the left menu. On this page we will enter the information previously in the old Silversync admin page's Authentication section:



There is also a new section on this screen called "Service Account". This account will be used to access files on behalf of the user. If you don't specify an account here, the system will use the "Network Service" account to access files. Ensure that if you specify an account here, that the account has read permissions on the files and folders users will sync.

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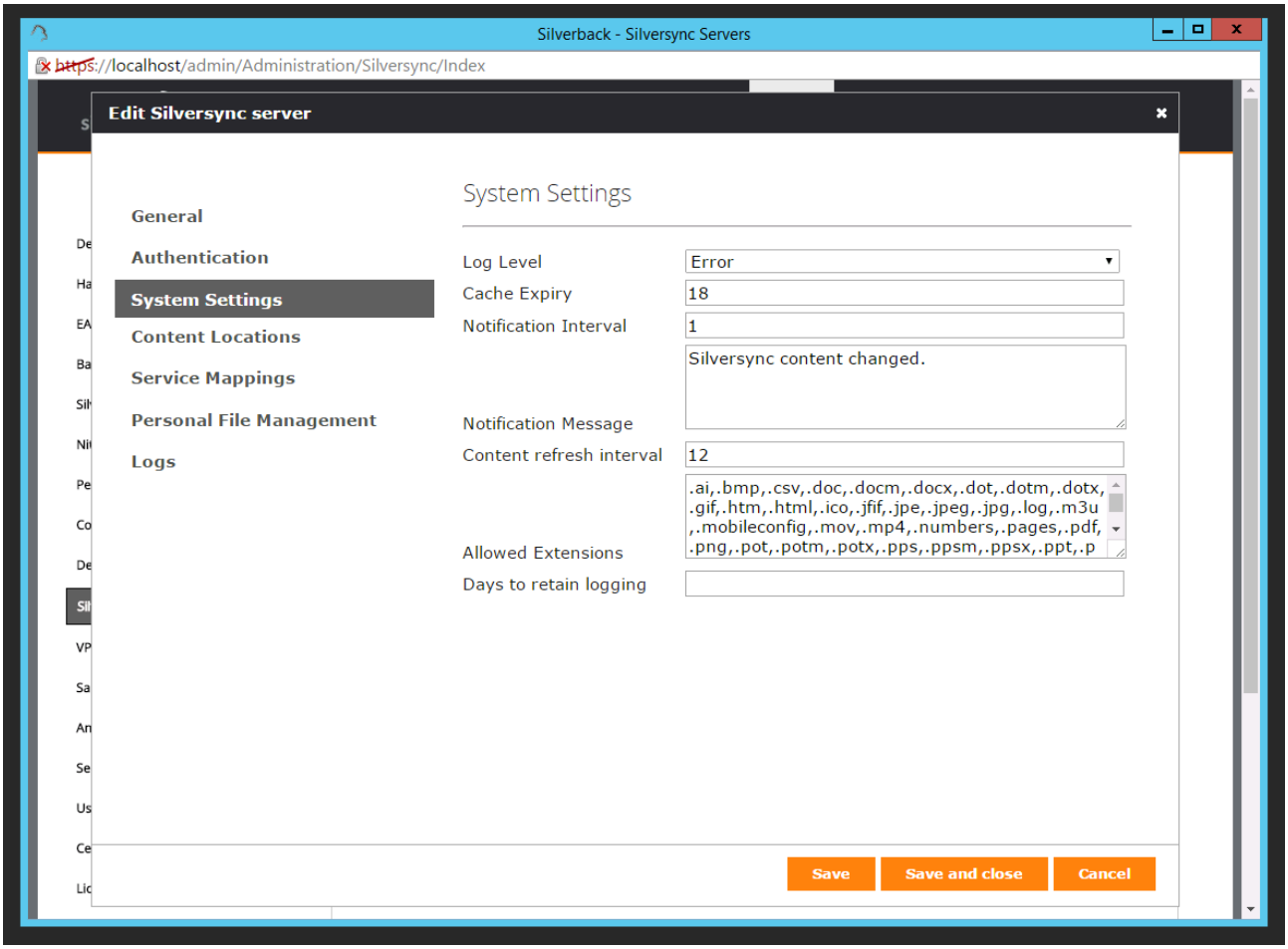
Next, click on the System Settings tab from the menu. This screen should be filled with the data recorded from the System Settings tab in your old Silversync deployment. This screen is largely the same, except without the App Fabric settings:



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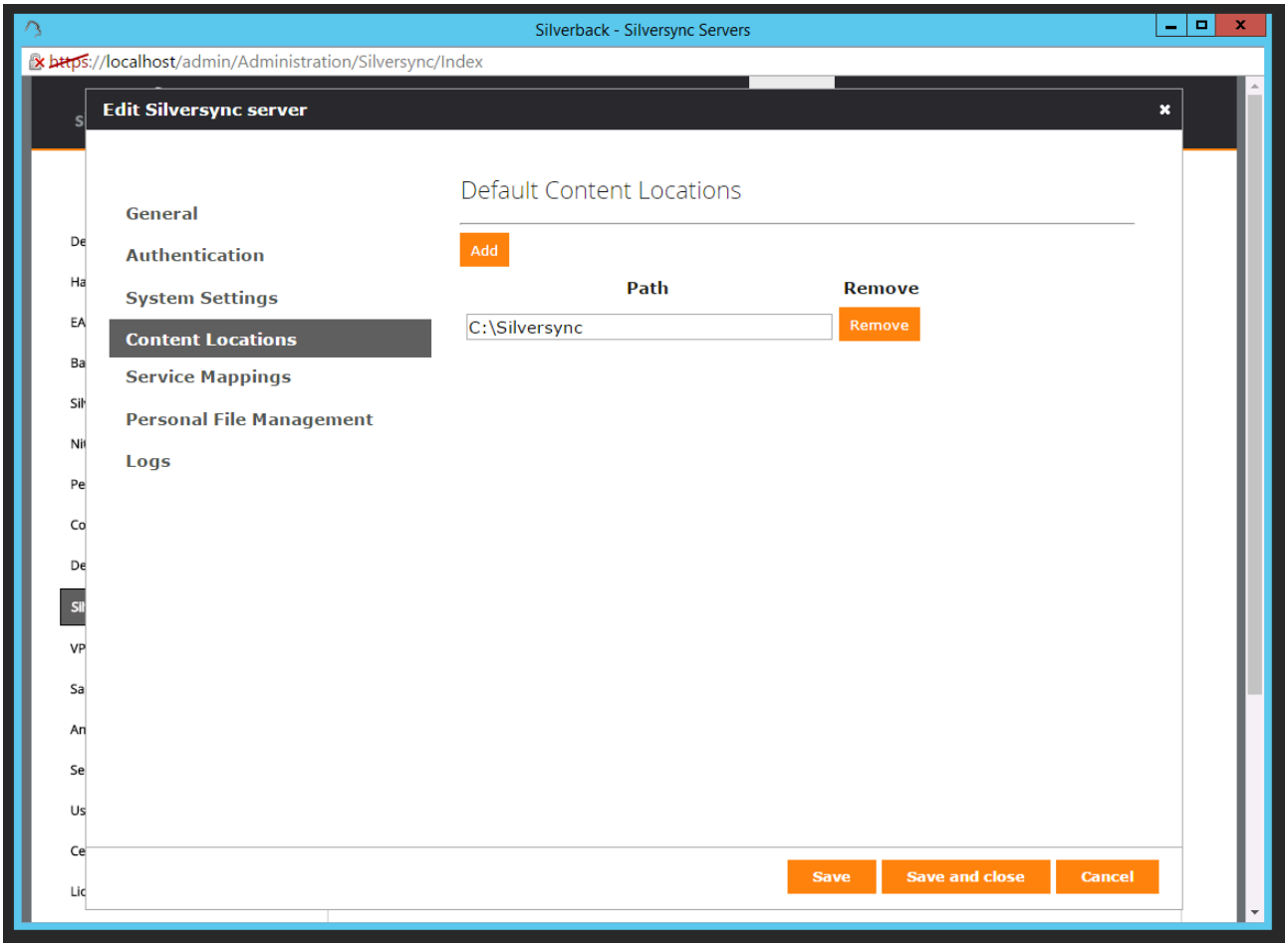
Next click on the Content Locations Tab. Again populate this with the recorded data from your old Silversync setup. This is the root location which Silversync will make files available for assigning via Tags:



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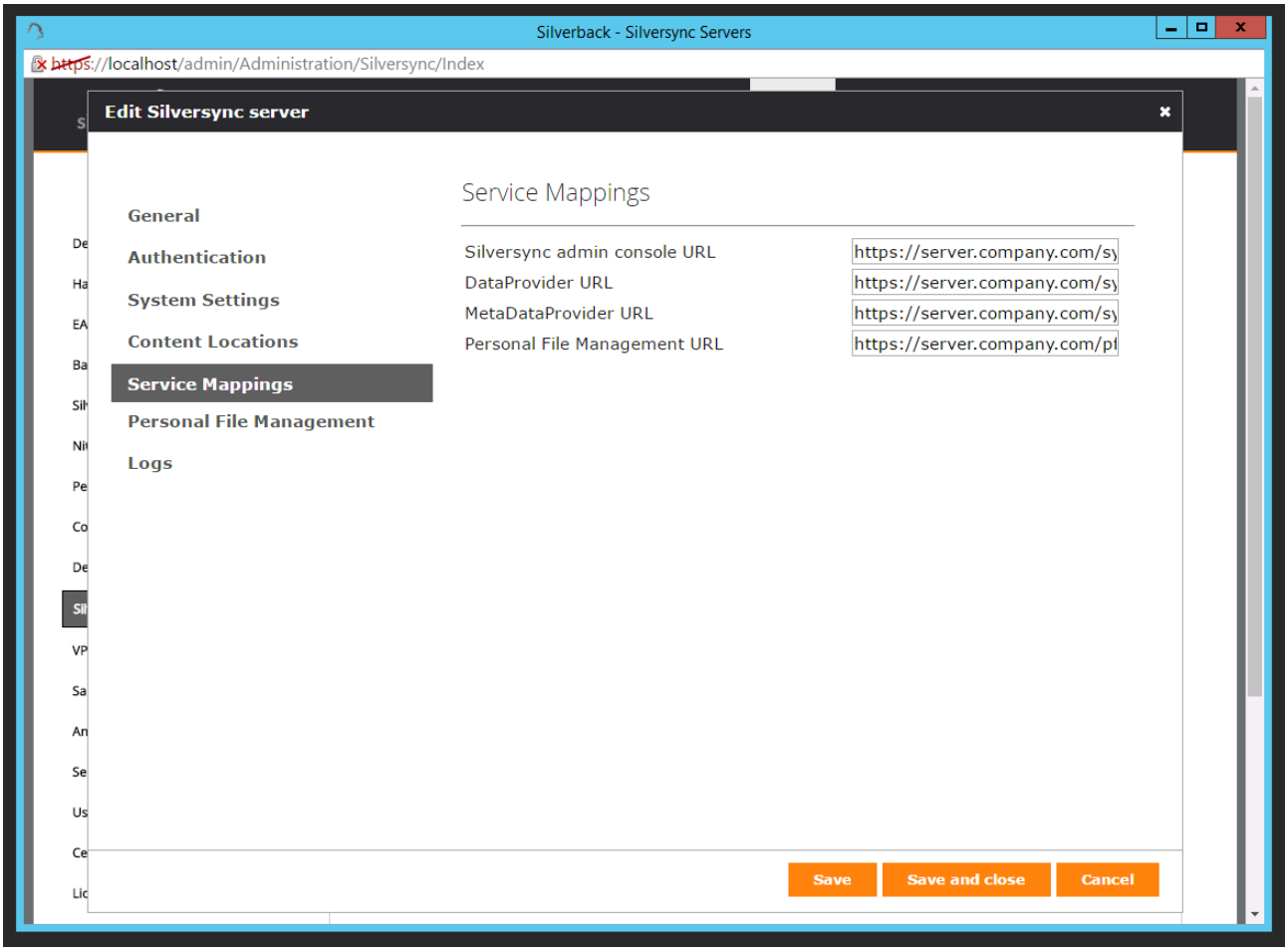
Click on the Service Mappings tab. In general, these settings should be left as default and they will be adapted from the server URL previously entered:



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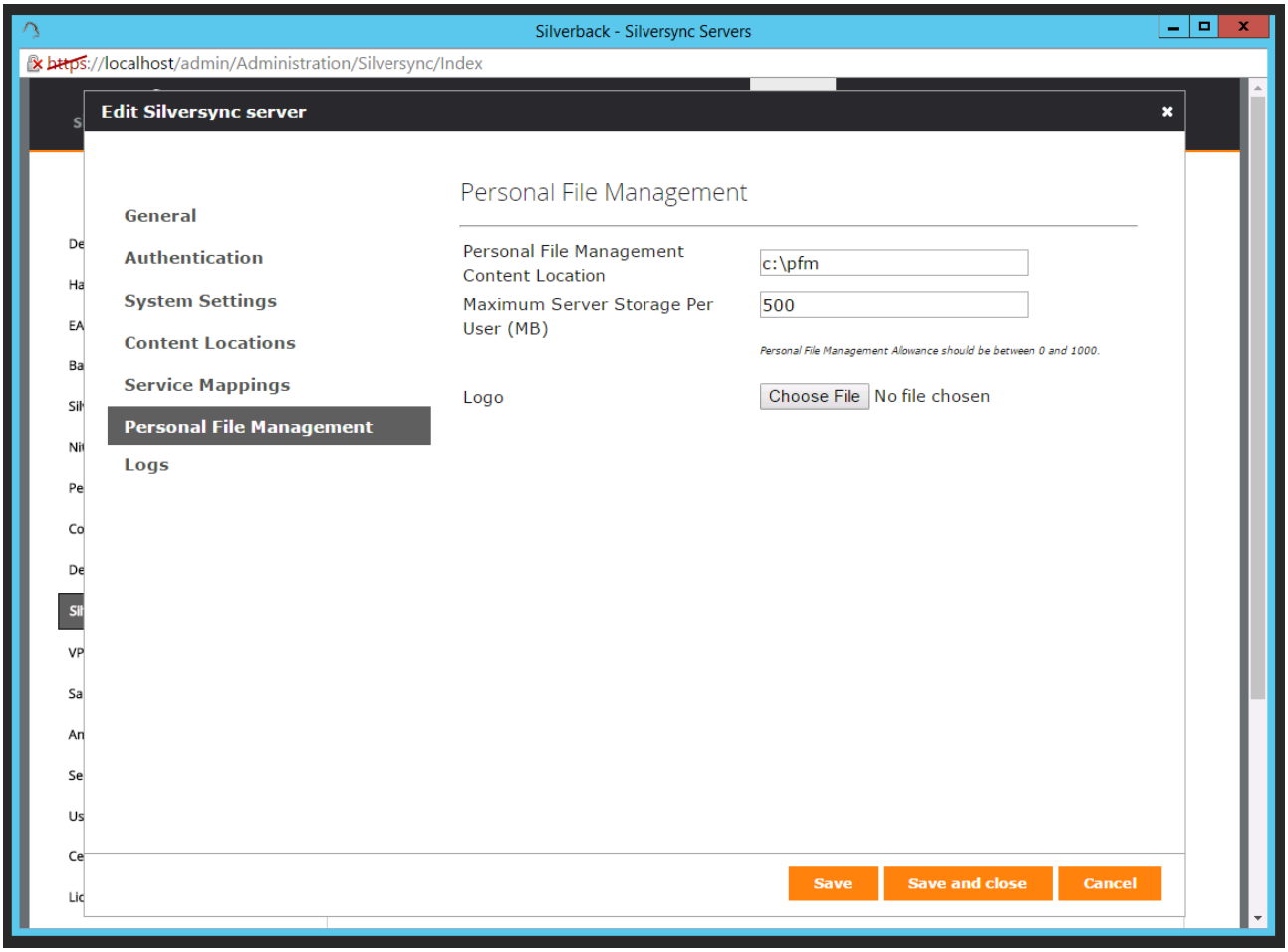
Click on Personal File Management, and enter the file location (if used in your old Silversync deployment) and also upload a custom logo if this was used as well.



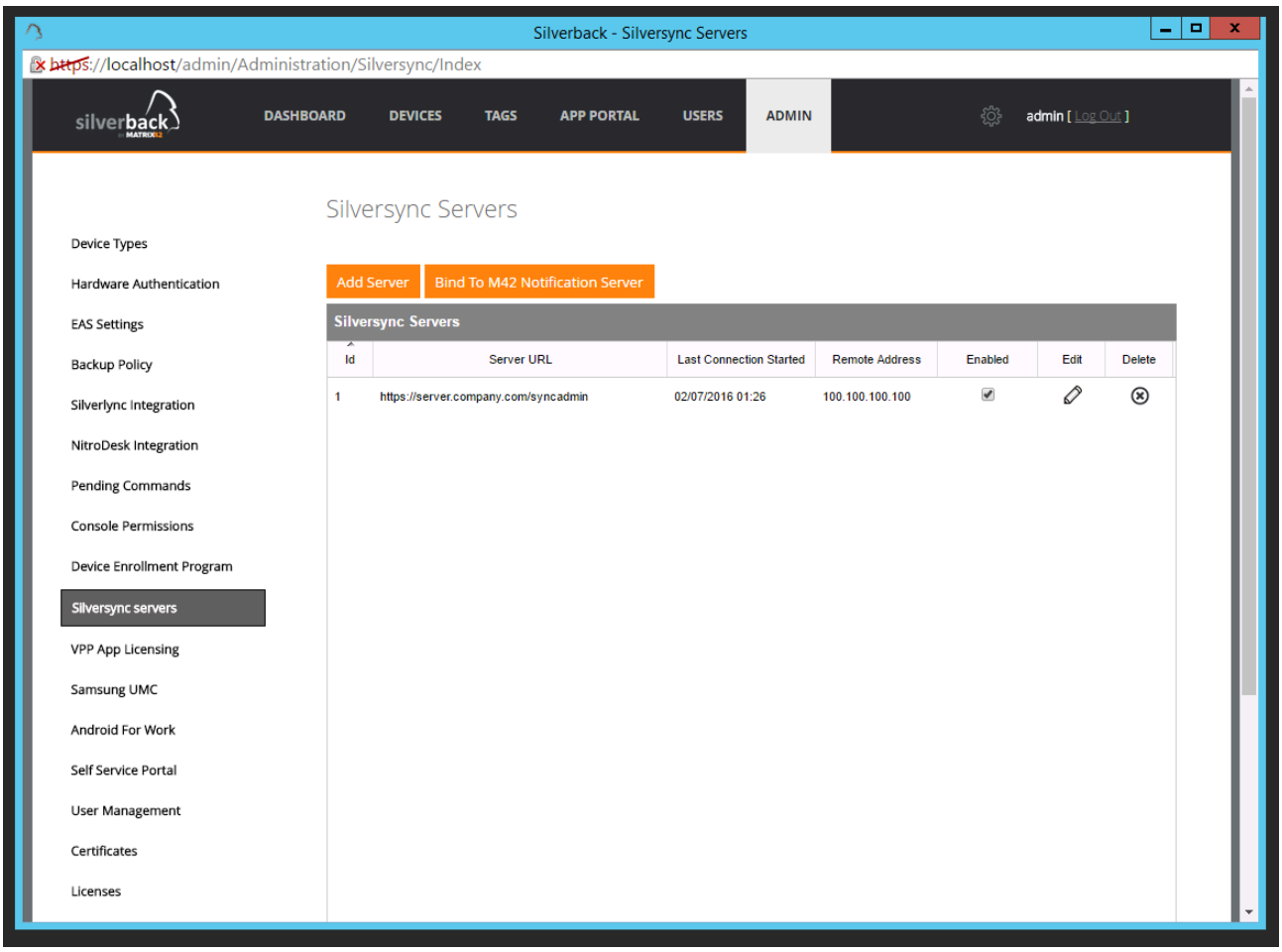
Finally, click Save and close to commit these settings.

3.6. Configure Push Notifications

Previously Silversync used its own push certificate for notifying users of new content. In this version, Silverback connects to the Matrix42 push service for you to handle push notifications.

To enable this, you need to bind your server to the M42 Notification Server. This is done from the Admin console in the Silversync Servers menu item, by clicking “Bind to M42 Notification Server”.

Note that currently notifications only work with Server Authenticates mode. This is because if the server does not have access to the files (like with User Authenticates mode), it does not know when content has changed.



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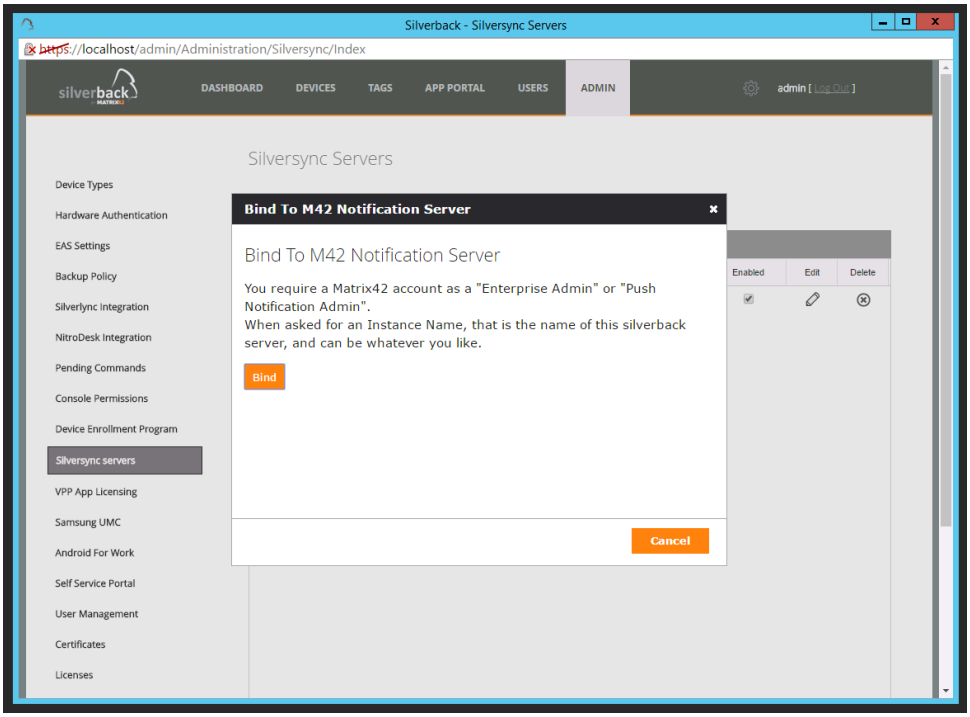
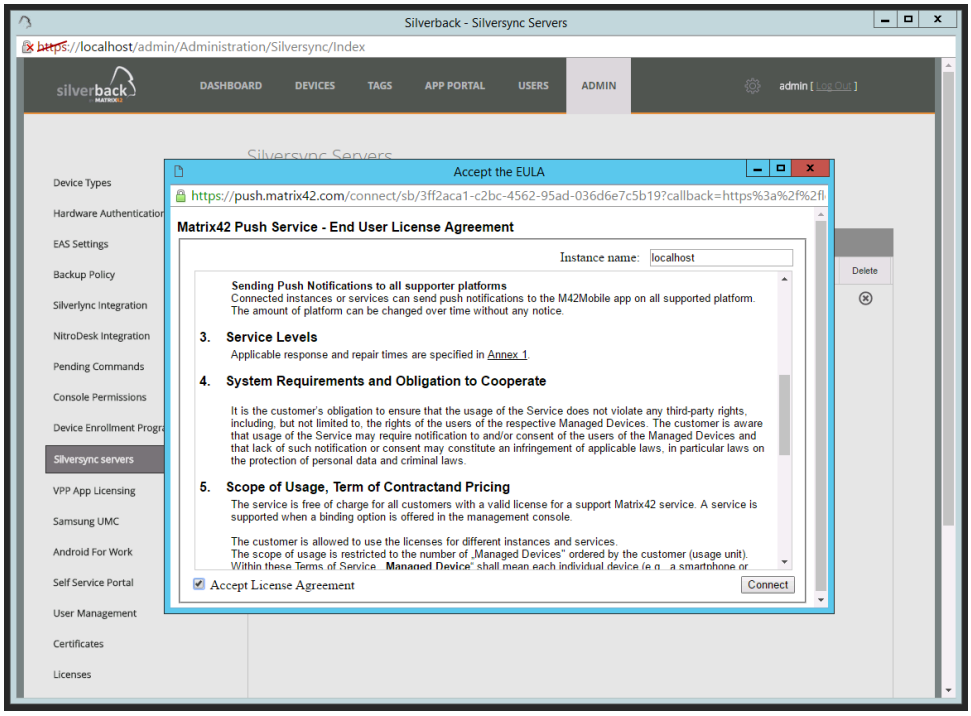
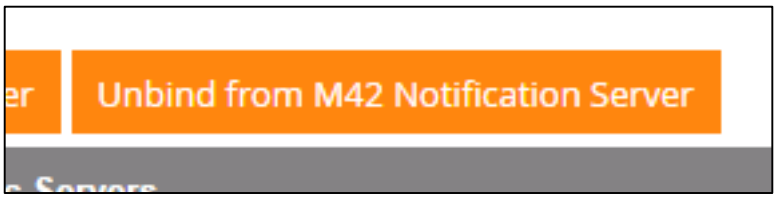
You will get a popup to complete the binding. Ensure you have a Matrix42 account that matches the requirements in the popup, and then click Bind:



Login with your Matrix42 account, accept the EULA and click Connect:



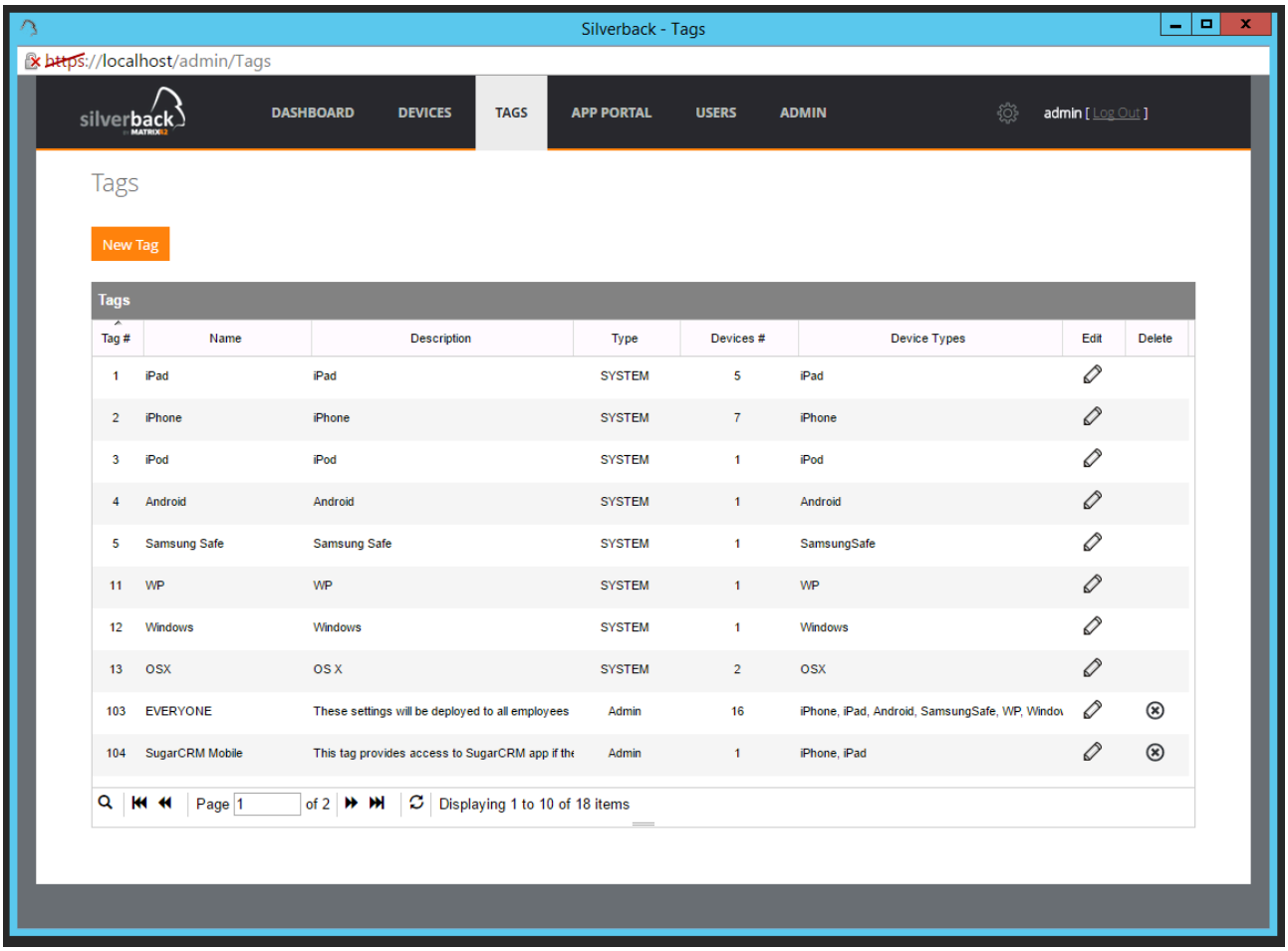
If this completed successfully, the button should change to “Unbind from M42 Notification Server”:



4. Content Mapping to Silverback Tags

Now we will assign the content to Silverback Tags to mimic what you had previously configured. Note that with this step, you are free to create whatever Tags you would like, however the steps below assume you want to create the same Tag configuration.

Click the Tags upper menu item:



Then click “New Tag”:

On the New Tag page, enter the name of the Silversync Tag you want to create, this can match the previous Silversync Tag name, but its not mandatory. Make sure you enable the Content feature for the Tag and also enable the Device Types you want to allow access and click Save:

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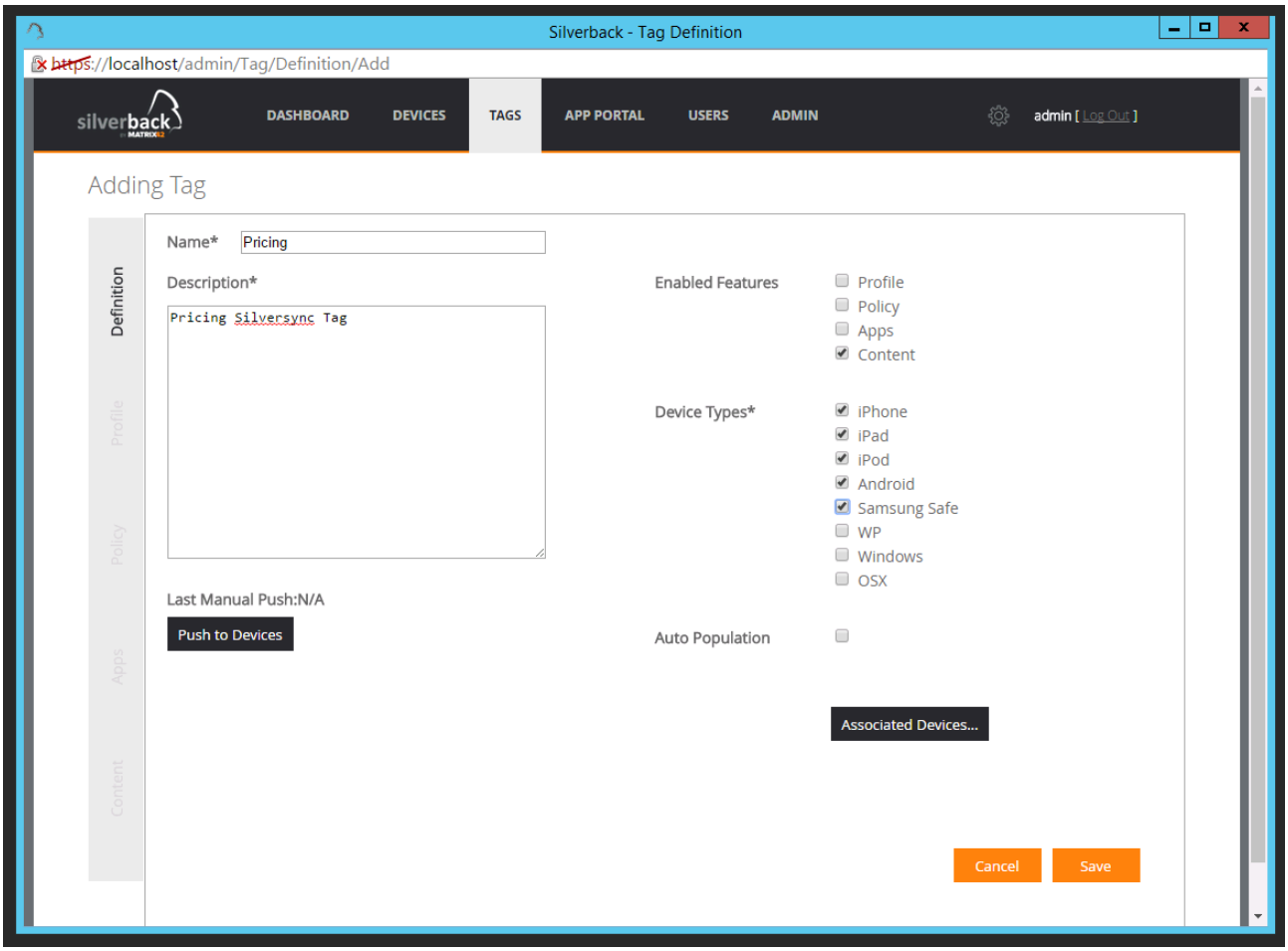

Author: Matrix42 Cloud & Mobile Management

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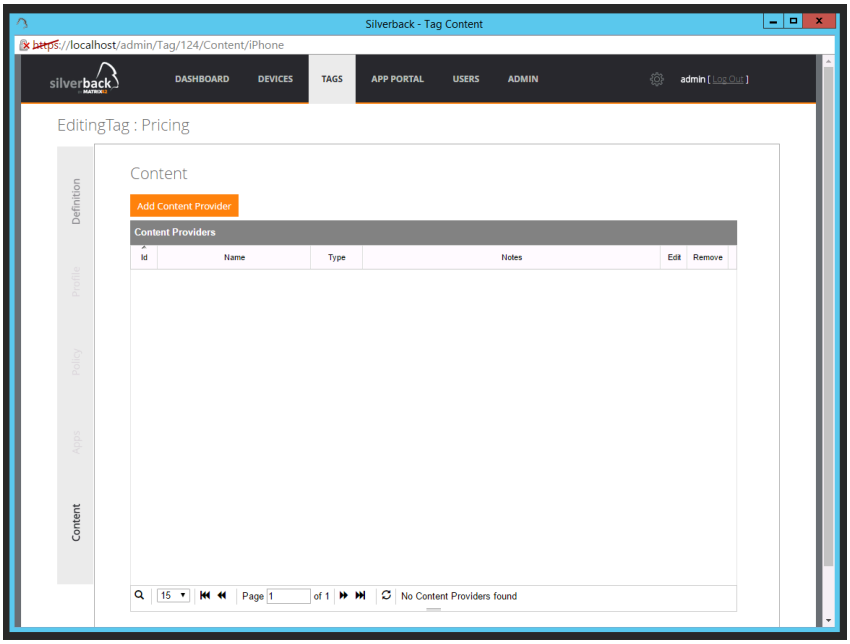
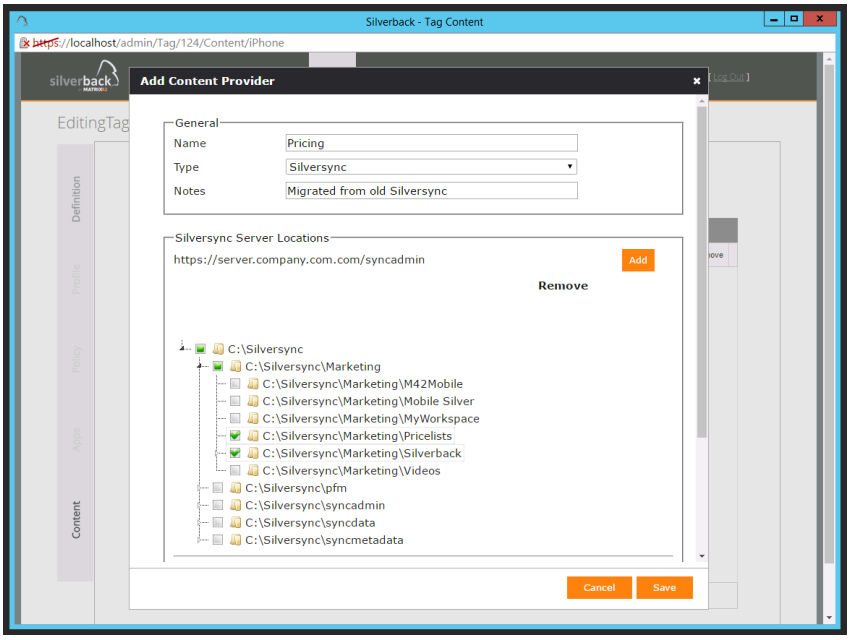
After saving, the “Content” Tab should be available from the left menu, click this to go to the Content Providers section:



Click Add Content Provider and you will be able to define the file paths. Give the settings a name and a note if required. It might be useful to use the note field to explain to other administrators that these settings were migrated, like the example below. Also select the folders for this Tag that you recorded in the old Silversync and click Save:

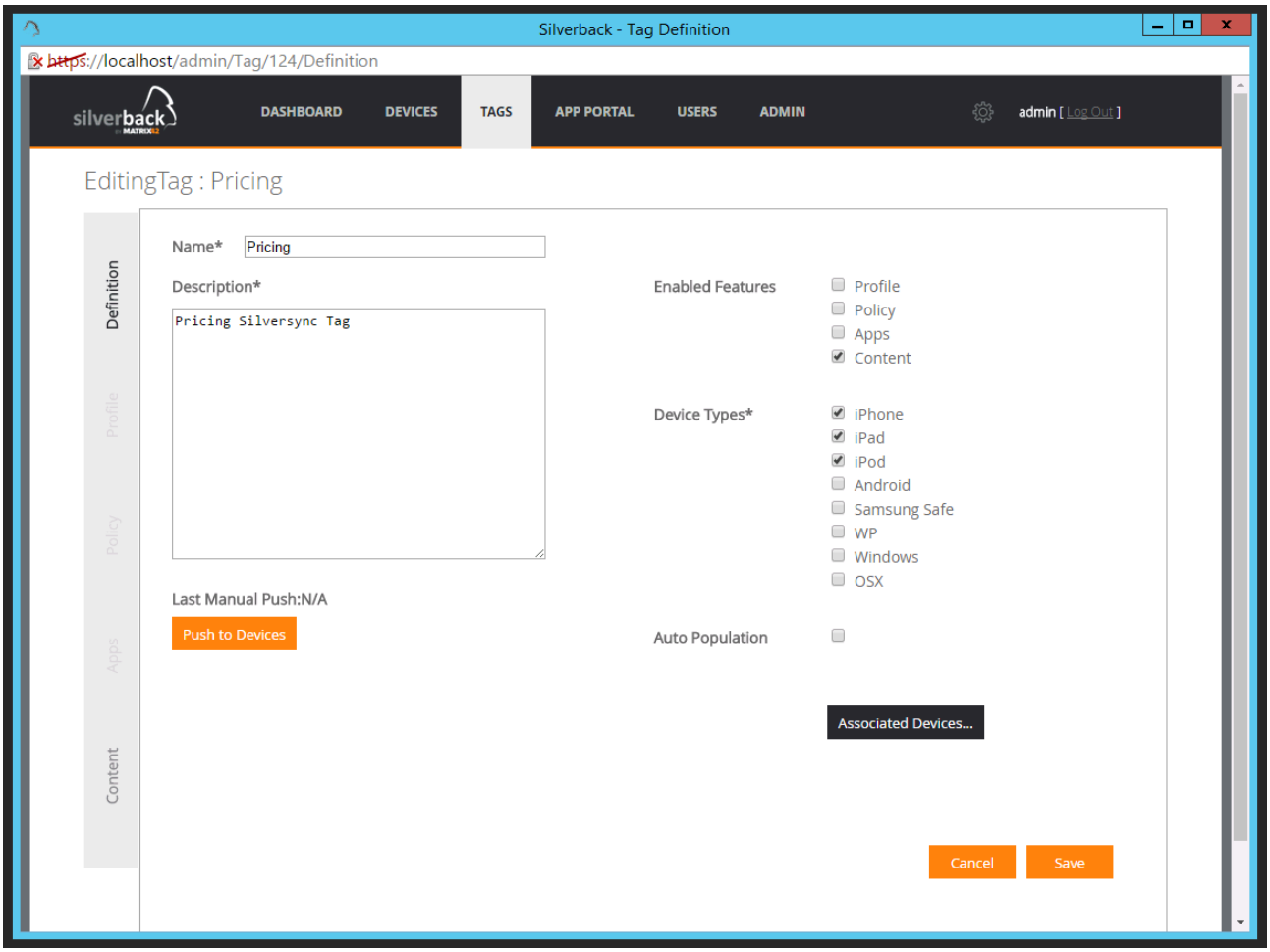


Repeat this section for any other Silversync Tags you want to migrate. You can add multiple file paths to one Tag if you would like, or create an individual Tag for every old Silversync Tag.

5. Tag Assignment

Now that you've configured the new Silversync service, mapped its content and assigned files to a Tag, you need to now assign this content to users. This is the same process as assigning a user to a Tag in Silverback normally, and can be done automatically, or manually.

For example, for manual Tag assignment, from the definitions page click "Associated Devices…":



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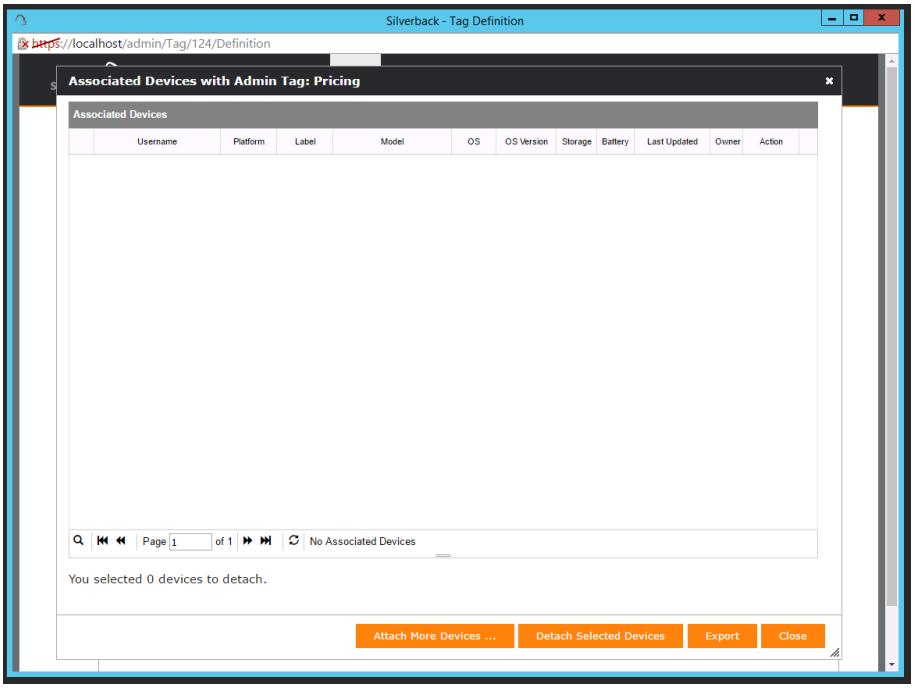
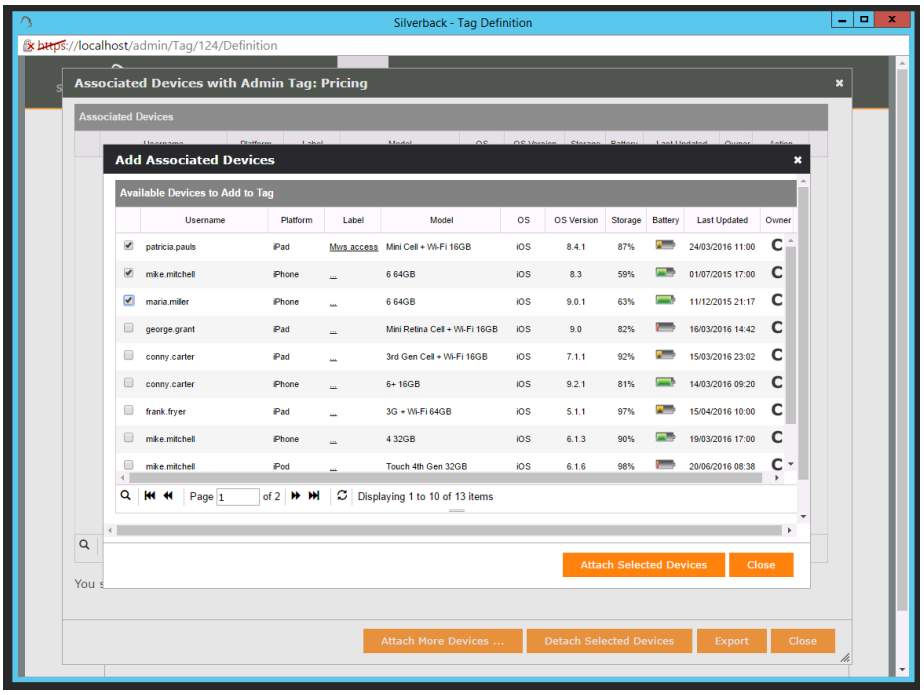
Then click “Attach More Devices…”:



From the following screen, select the devices you want to use this Tag. You can use the export from the old Silversync server for reference. When you are done, click “Attach Selected Devices”:



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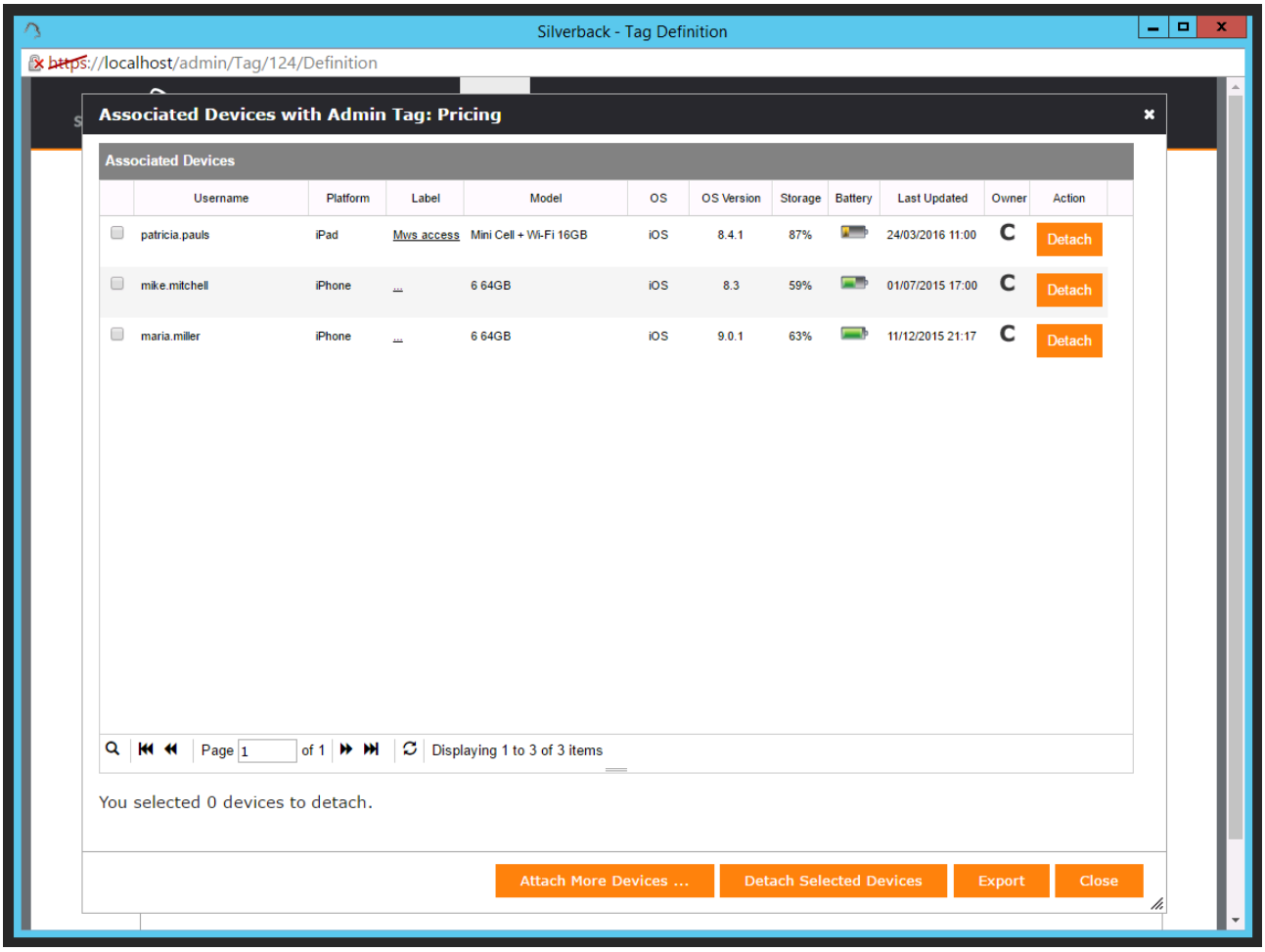
The devices should now be associated with the Tag:



6. Post-Upgrade Testing

After the upgrade, you should synchronise any test devices you nominated earlier to ensure the user experience is continuous without any problems.

After this testing is complete, your users should be able to sync their existing content without any interruptions.