Tips & Techniques

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Backup & Restore

This article is intended to provide users with a detailed understanding of the backup and restore functionality within the Collector's Assistant and also to discuss various approaches to backup both using the Collector's Assistant as well as general backup utilities. It also discusses some of the common circumstances under which a backup could be used.

Backup
The Collector's Assistant backup function is intended to safeguard data created within the Collector's Assistant which is specific to the user and cannot be reloaded from the standard installation CD's. This data includes:

- Collection data entered from within the Collector's Assistant
- Customizations to report formats and data entry screens
- Additions to choice lists existing throughout the data entry screens
- Contact information

The Collector's Assistant does not backup data created outside of the Collector's Assistant by other applications unless such data resides within the user data folder.
There are two types of such data currently attached to collection data by some users

- Image files - these are created by the user using a scanner or downloaded from some other source. The Collector's Assistant attaches to these files, it does not copy them. It will not back them up unless they are stored in MyData
- RTF Document files - this is less common, but users may attach .rtf documents which are displayed within the Note field of the tabbed folders. Again, the Collector's Assistant backup does not backup these files which were created using a Word Processor unless they are stored within the MyData folder

The Collector's Assistant Backup function automatically backs up all of the data within its purview to a destination selected by the user. Any destination drive enabled for R/W access with sufficient space and properly formatted media may be used for the backup destination. The recommended backup media is a USB memory stick or CD formatted for

R/W access and finally Closed making it accessible to all Windows computers.

Properly formatting a CD is more complex than formatting a USB Memory Stick and we have included a special section on CD formatting at the end of this article. To test whether a CD is properly formatted is very simple. Use the Windows Explorer or My Computer and attempt to copy any file from your c:drive to the CD. If you are able to copy using the Windows Explorer or My Computer than the CD should be writable by the Collector's Assistant. Similarly, if a file cannot be successfully copied, the Collector's Assistant backup cannot use the CD media until it is properly formatted.

Restore
Many users think of backup as the opposite of restore. We do not believe this to be the case and in our experience thinking of a Restore operation as the opposite of a backup operation is a major source of data loss by users of many applications.
The reason for the distinction is that the backup operation is essentially a completely safe operation. A copy of your real data is made on the destination media. At no time during a backup is your primary data written this a backup operation does not provide the potential for data loss and can be performed without much thought.

Restore is entirely different because the need to restore arisesnfrom many different situations.

Some of the situations which will cause you to access your backup data:

- Major hardware or system failure causing loss of all primary data
- User action resulting in partial data loss
- Sharing data between two computers
- Switching to a different computer
- Minor system event (lightning strike, power failure) causing partial data loss
- ... and others

For a few of these situations (installing on a new computer or switching to a different computer) the desired restore operation would be the inverse of the backup function but for all other situations, a full restore would cause the needless loss of primary data files which were still intact.

The user has the knowledge of the specific situation which requires restoration of some data and needs to precisely define what must be

restored in order to recover damaged information without needlessly losing recently entered information on files that have not been damaged.

This philosophy of backup and restore is the basis of the Collector's Assistant Plus Restore function. This function does not provide for full restoration of all data in one operation as it is our belief that such an operation, even when encumbered with user confirmation steps will result in needless data loss. The Restore function provides for user selected restoration of individual collection files. Thus if a user is working with their Morgan Dollar file and a power failure occurs corrupting that file, they will restore only that file and not other files which are more current than the backup and unaffected by the incident.

For those with a need to accomplish a full restore, the Backup generated by the Collector's Assistant Plus may be thought of as an image of all of the necessary files. All that needs to be done is to copy this image using Windows Explorer or My Computer to the new or repaired computer.

If you encounter a situation where you have a need to restore data but are unsure exactly what is needed, contact Carlisle Development Corporation Technical Support before restoring, erasing, etc. as we will be able to assist you in preserving as much current data as possible.

Definition of a Regular Backup strategy

- We recommend the following with respect to backup:
- Backup all data on a regular interval (monthly/quarterly) to permanent removable media such as a CD
- Backup at additional times, following major data entry
- Do not re-use backup media employed for your regular backups - save these so that you don't propogate a data loss through your backup.
- Store permanent backups at another location in the event of fire, theft or flood (safety deposit box, office, family member, etc.)
- Make temporary backups frequently on a folder on your hard drive to allow quick recovery from user errors.

Backing up outside of the Collector's Assistant
Most applications include their own backup functions but this is often not the best way for a user to protect their data. Most users are running many applications on their computers and all have the same basic need to preserve information unique to the user. Most CD write units come with system backup software allowing you to define a backup, selecting folders

and files within your system which will be protected. This backup can then be run at the desired frequency. In this way, a user takes an integrated approach to backing up their data and assures that they have all of their unique information in one place. For many users this will fill a few CD's, rather than ending up with 10 or 20 CD's one for each application.<p>For users taking this approach, (which is highly encouraged by Carlisle Development Corporation), the following folders should be added to your backup definition:

- C:\CollectorAssistant\Video
- C:\CollectorAssistant\Combos
- C:\CollectorAssistant\MyData

Formatting CD's
Preparing a CD for use by Windows applications is more complex than was formatting a 3 ½ diskette or USB memory stick. A CD can be commonly formatted in one of 3 ways:

- Audio - usually automatically formatted by programs which burn music on a CD
- Data - for use by all computer
- Data - general read/write access for use as a drive

In order for the Collector's Assistant backup function to be able to place data on the CD it must be formatted for general read/write access. This formatting is also required in order for Windows Explorer or My Computer to copy files to the CD and thus My Computer can be used to test for proper formatting.

CD's are formatted by a utility program usually provided with your CD write drive. For many computers, placing a blank CD in the computer will start a utility asking how you want to format it. This automatic behaviour, however, can be turned off by the user in which case you will need to start the utility from the Start->Programs menu.

Once you have formatted the CD for general read/write access as a drive it should be usable by Windows Explorer, My Computer, the Collector's Assistant and other applications.

One important consideration of this format is that a CD formatted for general read/write access can only be read by a computer having exactly the same backup utility. This can be corrected through the process of "Closing" the CD which renders it readable by all computers but no longer

accessible for writing. All backup CD's should be closed immediately after completion of the backup to assure their accessibility by all computers.

If you use an external backup program, these usually automatically format the blank CD into a format readable by all computers.