



## **FACT SHEET**

### **Backups Version 10**

June 2021

### ***BACKUP!! BACKUP!! BACKUP!!***

Backing up is the most important part of using Bookmark.

Backups are the lifeline against disasters such as hardware malfunction, ransomware virus, fire, theft, cyclone, lightning, laser blast, asteroid strike, thermonuclear apocalypse and Skynet.

If everything goes awol, you can always download Bookmark from the website, install it and restore a backup.

*Backups should be done every day Bookmark is used.*

**DO NOT RELY ON SERVER BACKUPS!** It is easier and faster to work with the Bookmark backups, and an IT technician is not required.

Bookmark's backup system is fast, reliable and easy to use.

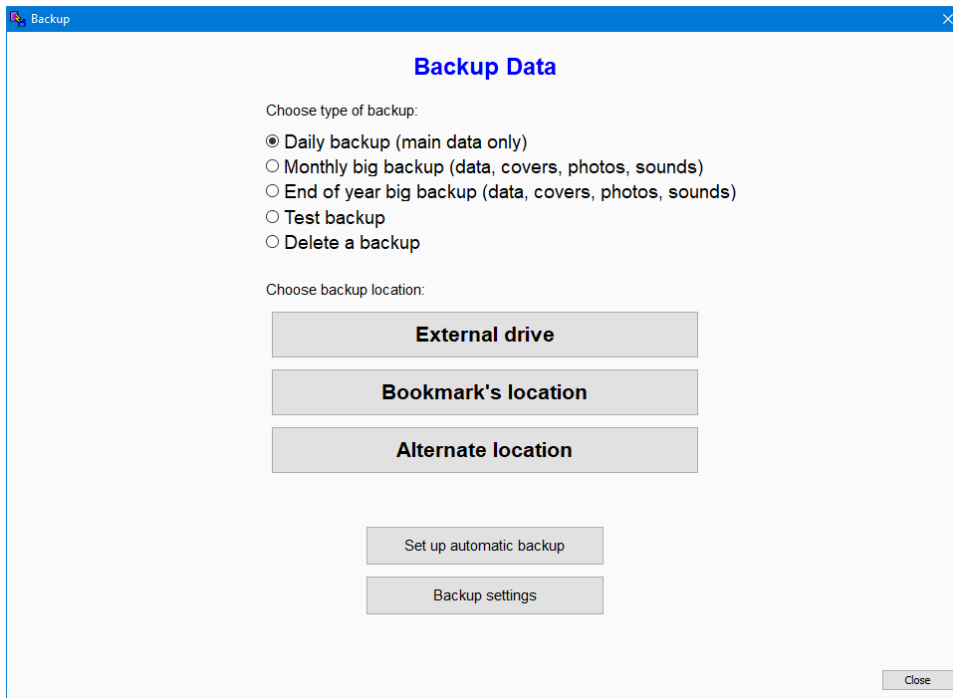
To backup, click on Utilities then on Backup.

There are 3 different sorts of backups:

1. Daily backup. (Data only, takes less than a minute).
2. Monthly backup. (Data, images, sounds, etc. Only takes a minute or two.)
3. Annual (yearly) backup. (Same information as monthly.)

Any of these types of backups can be made to a destination:

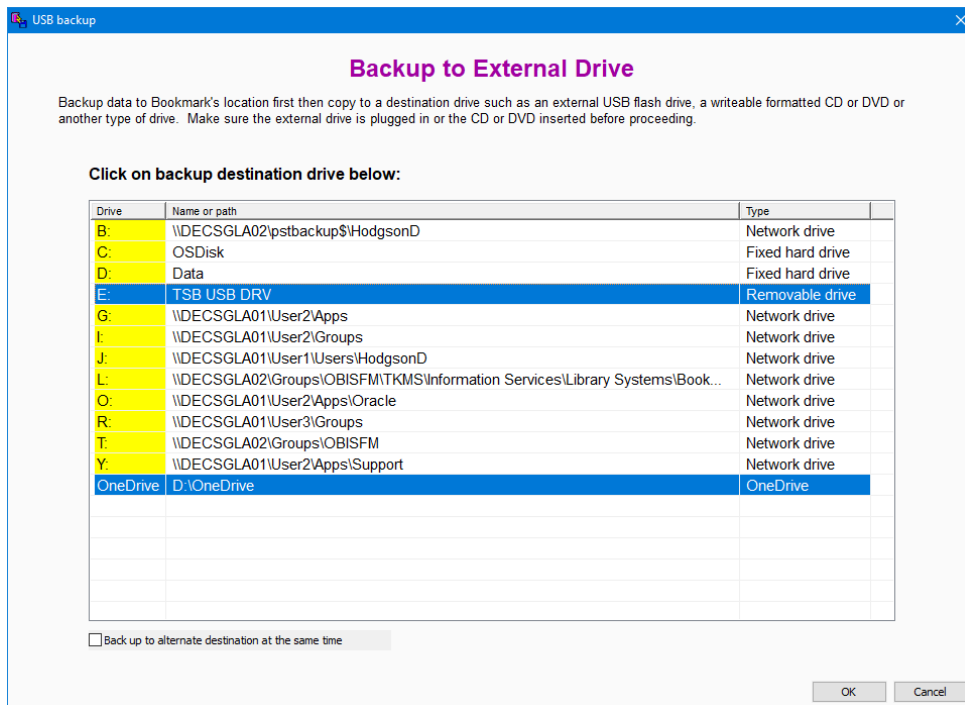
- External drive
- Bookmark's location
- A specific non-standard destination (rarely used)



## External drive

End of day backups should be made to a drive or media that can be removed from the computer.

In the example below, a USB flash drive is plugged in and OneDrive is used. The other drives are computers on a network or local drives in the PC itself (C: and D:).



## Server Backups

Server backups are complex and require the services of a technician for restoring data, which could prove a problem as invariably on the day disaster happens the tech is unavailable. Or the backup has been scrambled or hit by a virus. Or the server has changed and the backup system is not compatible with the old one. Or the server backups only go back 3 days. Etc. Relying on a “server backup” is handing the responsibility to someone else out of library control.

The Bookmark Help Desk is not able to assist with any other backup system.

Even if a server backup system is in place, do backups in Bookmark anyway. Safer, easy, fast.

## Where to Backup?

**Backing up to a USB flashdrive is normal.** Have three flashdrives, two for a normal backup and one for the archive backup. Label one Week A and another Week B and alternate. (Redundancy if one fails.) Use one drive for all backups for a week (Bookmark marks these.) A backup is not large (20-150 mg each backup), so the flashdrive does not need to be high-capacity (2 Gb or larger is fine). The size of backups depends on the size of the database.

**Backing up to a formatted CD.** Windows 7, 8 and 10 can use a CD like a floppy disk if a read/write CD drive is attached to the computer. The CD's can be formatted and then written to as many times as needed. Read/write CDs are even more reliable than flashdrives. Most useful for the monthly and annual or any other backups.

**Backing up to an External Hard drive.** Plug-in external hard drives are good destinations, too, but remember that Bookmark only keeps a weeks' backups on one. External drives can fail just like normal hard drives and flashdrives, so it is best to use more than one if possible.

**Backing up to Bookmark's location.** Whenever a backup is made to an external location, *the backup is first done to Bookmark's location always* - this is where Bookmark itself is located – before it is copied to the destination. It is not necessary to back up to Bookmark's location separately then do a backup to a flashdrive.

Backing up to Bookmark's location is also useful at other times, especially during stocktaking. Stop at recess time (mark the item where the process is up to). Red, green, yellow backups are available and can be rotated. At hometime, the normal flashdrive backup.

Do not rely on Bookmark's location as the sole destination.

**Alternate backup** This backup requires knowledge of the correct drive letters and paths available on a network. The Alternate Backup backs up to any drive and folder on a network but it must be specified. If a folder is involved, it must be created first. The alternate backup destination is rarely used and is only provided for unusual situations.

### **Automatic backups**

An Automatic backup allows a computer to automatically perform a backup at a set time – e.g. 2 am. All that is required is that the computer be switched on. Bookmark does not even have to be running. Setting up an Automatic Backup is a two part process, best left for the IT technician to set up. Go to Utilities then Backup and click on the Set up Automatic Backup button.

If the automatic backup is to be made on a server, the Windows Scheduler must be set up *on the server* and not via a workstation. Setup on a workstation if backing up to an external destination.

### **Marion's rule:**

The one day that you need the backup, it wasn't done the night before.!!

### **Dean's rule:**

The day you need the backup, it will have been left at home.

### **Checking Backups**

This should be done once a term. Watch the screens as the backup is checked. If no message appears the backup is ok.

## **Rules about backing up**

- YOU or your designated substitute, must backup often from within the Bookmark program.
- You MUST regularly backup. Usually this is every day, even two or three times a day when stocktaking.
- You MUST have multiple copies of backups i.e. 2 flashdrives at least. "Don't put all your eggs in one basket."
- Do NOT rely entirely on backups established by technicians or other people. Use the built-in Bookmark backups even if other backups are being made. Server backups are not necessarily more reliable. If the backup system relies on the server's nightly backup the question needs to be asked about how many backups are kept, how often these backups are checked, and how easy is it to restore data by YOU? The day that a problem occurs is invariably at the time when the IT person is sick/at a training course/or in class or otherwise unavailable. IT staff changes, and the person who set it up may not necessarily be the person who needs to

restore when trouble occurs. The Bookmark Help Desk cannot provide help if only other types of backups are made. It can always help with standard Bookmark backups.

- **DO NOT BACKUP IF YOU HAVE HAD AN ERROR!!!** If you do, the backup will contain the error and will overwrite a good backup without the error.
- Call the HELP DESK immediately if you have any type of problem.

### **Changing Computers**

When changing the Bookmark host computer, be sure to do a Monthly or Annual backup as well as the normal backups, which only contain the main text data whereas graphics backups hold book covers and sounds (not data files).

### **Backups only Contain Data not the Program**

Because the Bookmark program files change frequently the best way to obtain a copy of the program is download the latest installable copies of the program. Ring the Help Desk.

### **Backup up to the cloud**

The Cloud is another name for servers on the Internet on which data can be stored. Because they are accessed via the Internet, the data can be retrieved anywhere, as long as the user knows where to look and their login and security information.

Some Cloud backup services are called Dropbox, Google Drive and Microsoft's One Drive.

OneDrive is included with Windows 10 and can be added to Windows 7. To use OneDrive, a user account must be established first.

The backup to OneDrive can be found on the External Drive list. Just highlight it.

Backups to Dropbox or Google Drive are possible if these have been set up. Dropbox, for example, can create a folder to which Bookmark can send a backup. That is arranged as an Alternate Backup. Google Drive is similar. Both require accounts.

Note: Dropbox and Google Drive may be blocked.

Note: uploading to the cloud is much slower than downloading and with large backups can take some time.

### **Daily Backups**

Bookmark does backups to its location every morning depending on the switches that are turned on in General Control. By default, this is turned on, but it can be controlled in Controls / General Controls or in Utilities / Backup / Settings.

## Backup Formats

Backups work by compressing all the Bookmark data files (.bmd) into a single “archive” file.

Three compression formats are available:

- LZH This is the standard format used for Bookmark backups. It is reliable. It uses the LHA compression and decompression software. The terms “freezing” and “melting” are used instead of “compressing” and “decompressing”. A blue progressbar appears.
- ZIP This is a very common compression format. Windows itself is able to open zip files so the contents can be extracted. The size of the compressed file is slightly less than LZH format. A green progressbar appears during a backup or restore.
- LZM A special format used by “7-zip” software and Bookmark. Slower than LZH or ZIP, the resulting compressed file is much smaller.
- PAC A special format used by Bookmark alone. Fast compression but the resulting file is slightly larger than LZH. Not suitable for monthly backups.