

# *BackUp ToolKit 3*

## ***User Manual***

Your Serial Number:

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## **Credits**

The BackUP ToolKit User Guide was written by Tri-Edre with modifications performed by staff of FWB Software.

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# 1 - Introduction

## 1.1 Welcome!

Thank you for purchasing BackUp ToolKit!

BackUp ToolKit is the backup utility for Macintosh that you can use for:

- Data backup (mirror or incremental).
- Data restoration (in case of file loss).
- Data synchronization of two volumes or two folders.
- Scheduled data backup and data synchronization.

## 1.2 Thank you for registering

After the BackUp ToolKit software is successfully installed, a dialog box will pop up prompting you to register the software. If you select “Now”, FWB internet registration software will launch and you can then register your software. You can select “Later” to register the software on a later date. The internet registration software resides in the BackUp ToolKit folder.

Once you are registered, you will have access to FWB’s technical support and will be notified of updates and news about our products.

## 1.3 Latest version of the software

Check our web site “<http://www.fwb.com>” to find out if you have the latest version of this software. If you do not have the latest version of BackUp ToolKit, download the updater from our web site.

*Note: serial numbers are compatible with all versions having the same main version number: a serial number of version 3.0 is usable with versions 3.01, 3.02, etc.*

## 1.4 Program Setup

On the CD-ROM, you will find the «BackUp ToolKit 3 Installer». Drag this folder into your hard disk.

If you purchase a download version of BackUp ToolKit from our web site, you can simply double click the installer to install Backup ToolKit to your hard drive.

## 1.5 Removing the Software

To remove this software from your hard disk:

- Run BackUp ToolKit, select all programmed actions, delete these actions and quit BackUp ToolKit (this will remove the files that automatically launch BackUp ToolKit at start up or shut down).
- Move the application folder «BackUp ToolKit 3 Folder» to the Trash.

*Note: BackUp ToolKit is required to uncompress the files compressed with BackUp ToolKit.*

## 1.6 Upgrade from version 2

If you are a user of BackUp ToolKit 2 and want to continue using the previous settings and configurations that were created, install BackUp ToolKit 3 and before you run the software, copy files «BackUp ToolKit.Exclusions» and «BackUp ToolKit2.Configurations» (from version 2) into the «BackUp ToolKit 3 Folder».

If you have already used BackUp ToolKit 3 and created new configurations, the old ones will not be imported. To import old settings, you will need to remove all the programmed actions, quit the application, copy files «BackUp ToolKit.Exclusions» and «BackUp ToolKit2.Configurations» (from version 2) into the «BackUp ToolKit 3 Folder», and re-run BackUp ToolKit.

*Note: Version 3 needs a new serial number. You cannot use your previous version serial number. Please contact sales@fwb.com or visit our web site at <http://www.fwb.com> for upgrade information.*

## 1.7 Launching and Personalizing the Software

To run BackUp ToolKit, double-click on the BackUp ToolKit icon. On its first launch, you will be prompted to enter your serial number (sent to you by email, or on a sticker on your CD jewel case). Please store this number in a safe place (for future upgrades and technical support).

BackUp ToolKit will be automatically opened at start up if:

- Under Mac OS 9, you create at least one programmed action that will be automatically triggered. BackUp ToolKit will create a startup file in the folder «Startup Folder» in your «System Folder».
- Under Mac OS X, select the «login» feature in the «System Preferences» and drag the BackUp ToolKit icon to the «Login items» list.

## **1.8 Technical support**

Our technical support is free and can be accessed by e-mail or fax. You must include in the e-mail or fax your serial number, system configurations, and the software version number.

## **1.9 Contacts**

If you have comments about this product, problems or questions unresolved with this user manual or with our web site – or if you are interested in a site license – please contact FWB Software (specify the version and serial numbers of your copy) at [info@fwb.com](mailto:info@fwb.com).

## 2 - Basics

### 2.1 Two types of action: Immediate and Programmed

#### Immediate Actions

«Immediate Actions» are designed to run a backup or a synchronization quickly and easily with very few settings. Possible actions are:

- Backing up a folder or a disk,
- Restoring a file, a folder, or an entire volume,
- Synchronizing a folder or a volume,
- Compressing (or uncompressing) a folder's content.

#### Programmed Actions

For repetitious actions, or actions that you want to be perform on a schedule, BackUp ToolKit offers «Programmed Actions» mode. The settings of these actions are saved and these actions can be executed and scheduled to run automatically.

Programmed actions available are:

- Backing up folders and disks (with three different modes: mirror, evolutive, and incremental),
- Synchronizing two folders or volumes,
- Compressing/uncompressing and password protecting a folder's content.

### 2.2 What can be backed up or synchronized?

BackUp ToolKit can handle any mounted volume on the desktop of your Macintosh. Backups can be done on removable cartridges, a second drive, a drive on the network, or even a designated backup folder on your hard drive. If you can drag and drop a file from the desktop to the media to copy it, then BackUp ToolKit can backup to it. BackUp ToolKit handles files (documents, applications, etc.) and copies these files when backing up or when synchronizing.

**Any volume you want to back up or synchronize must be on the desktop.**

### 2.3 To run any backup functions, BackUp ToolKit must be run-

## ning!

BackUp ToolKit doesn't install any extensions or control panels.

Under Mac OS 9, in order to automatically launch backups and synchronizations, BackUp ToolKit creates a file in the "Startup Items" folder in the System Folder. BackUp ToolKit automatically launches at every start-up and can be quit if necessary.

Under Mac OS X, select the «login» feature in the «System Preferences» and drag the BackUp ToolKit icon in the «Login items» list.

**Do not quit BackUp ToolKit! If you do so, BackUp ToolKit won't be able to make backups until it is relaunched or until the computer's next startup.**

## 2.4 Backing up

BackUp ToolKit automatically makes a backup of your data by copying every modified file onto another disk, onto a network drive, or on a high capacity disk such as Zip or Jaz disks, etc. BackUp ToolKit can save the content of the whole volume or a specific folder. Choose the configuration you need.

BackUp ToolKit makes copies of original files for backup. Files are automatically copied into the backup location--the same way as moving them via drag-and-drop. The directory structure (folders, sub-folders, etc.) is kept intact. You can then, even without BackUp ToolKit, check manually what was saved, and you can retrieve a file directly from the Macintosh Desktop.

Three backup modes are available in BackUp ToolKit:

- **MIRROR BACKUP:** This backup mode creates an exact copy of a folder or the entire content of any volume you selected as the source for backing up. During each backup, the backup copy is updated to remain identical to the source folder or volume. After the initial backup, BackUp ToolKit only back ups files that were modified (or added) in the source folder.
- **EVOLUTIVE MIRROR BACKUP:** This backup mode creates an exact copy of a folder or the entire content of any volume you selected. Similar to Mirror Backup, the backup copy is updated during each backup to remain identical to the source folder. In addition, BackUp ToolKit keeps track of any modified, added or removed file, and saves the previous versions of each modified file. You have the option to limit the number of versions of the same file saved in the backup. There is also an option to clean the backup by removing older versions. And after the initial backup, BackUp ToolKit only copies files that were modified (or added) in the source folder.

- **INCREMENTAL BACKUP:** This backup mode allows you to keep a copy of every version of a document. During each backup, BackUp ToolKit copies only the files that have been modified since the last backup, creating a new folder for each backup (previous backups are not overwritten).

Backup settings allow for file compression or file exclusions (aliases, icons, invisible or temporary files, etc.).

## 2.5 Backup placement

BackUp ToolKit specifies the destination folder where the backup is copied. BackUp ToolKit creates a new folder for each of the volumes or folders to back up, in this destination folder.

*For example, if you back up your disks “Hard Disk” and “External Disk” in the “BACKUP” folder on a high capacity disk, the backed up versions of the folders will have the same names as the original volumes. In this example, the folder “Hard Disk” and “External Disk”, would be created in the “BACKUP” folder.*

**The destination folder is a backup «container».**

## 2.6 Restoring

A file restoration process is the reverse of a backup operation. It allows all files that were copied during backup (or that were deleted or modified in the source) to be restored in the source folder or volume.

Restoration is used to retrieve lost or deleted files, to retrieve a previous version of a document, or to rebuild an entire folder or volume.

*Note 1: every replacement of an existing file will require confirmation.*

*Note 2: BackUp ToolKit makes exact copies of files during backup. It is possible to restore a file manually via drag-and-drop from the backup container to the source folder.*

## 2.7 Synchronizing

When a synchronization is started, BackUp ToolKit compares the content of the two folders (and of their sub-folders) or of two volumes. If a file is missing (or is older) in one of the two folders, it will be overwritten.

When the synchronizing process is over, the content of the two folders (or volumes) will be identical, each of them containing the latest version of the files.

The synchronization mode is automatic and therefore easier, quicker and more

reliable than opening every folder to make copies of files one at a time via drag-and-drop.

**Caution: if a file was modified in one of the two folders, the newest version is kept. Make sure you computer's date and time is set correctly.**

*Note: You can use the synchronization feature to update (or synchronize) two computers.*

## 2.8 Multiple configurations

A great advantage of BackUp ToolKit is that you can schedule multiple backups or synchronization operations. These can be launched automatically, without any user intervention.

It is possible to create as many configurations as needed.

For example, you can schedule:

- An hourly mirror backup of important data (to make sure you have an up-to-date copy)
- An incremental backup of a frequently used folder every evening at shutdown (thus keeping successive versions of a report).
- A complete backup of your hard disk, on every 1st day of the month at 8:00 AM (as a reference backup on a CD-ROM).
- A synchronization of your “Customer File” nightly at 11:00 PM (to make sure all computers on your network are up-to-date).
- Any other configuration as fits your needs.

# 3 - Backup Strategies

Although backups can be run manually with its Immediate Actions, BackUp ToolKit's strength is automatically backing up data. Once configured and scheduled, the backup or synchronizing operations will be performed at the scheduled time without user intervention. By creating configurations suited to your needs, you will be able to make full backups as well as specific backups of important folders.

## 3.1 What kind of backup to use?

BackUp ToolKit offers multiple backup possibilities (these are detailed in the «The Different Modes of Backup» chapter).

**Mirror backup** lets you have an “exact copy” of your data which allows quick and easy retrieval of your work environment after accidental loss of data or disk crash. Note however, every “error” in the source or every corrupted file will be reflected in the destination folder.

**Evolutionary mirror backup** is an almost identical mirror backup--creating an exact copy of your disk or folder. However, when a file is modified or removed, the evolutionary backup saves the older version prior to replacing in the backup folder with a newer one. With evolutionary mirror backup, BackUp ToolKit can save the evolution of the content, and you will be able to go back to a previous version easily. The downside is the evolutionary mirror backup needs more disk space than the mirror backup (and the needed space can be important if old files must be saved for a long time). You can limit the number of versions you want to save by selecting the option to remove the older versions of the backup.

The great advantage of an **incremental backup** is it keeps all successive versions of a document at your disposal (for example, you will be able to get a previous version of your document, if you accidentally deleted something which is important) without copying old files.

**We recommend combining both kinds of backup, possibly limiting incremental backups to important, frequently used files.**

## 3.2 Background backup

BackUp ToolKit can perform backups while you are working on your computer.

BackUp ToolKit works faster when running in the foreground. If it is running in

background, BackUp ToolKit works slower but allows you to run other applications simultaneously.

### **3.3 Create configurations for every backup**

We recommend setting up various backup configurations to fit your needs. Using multiple configurations to optimize your backup strategy can result in a quicker backup and saves backup disk space. Also, be sure to execute a complete backup as necessary to protect your entire system.

### **3.4 Backup of several computers on the network**

You can also keep a designated hard disk on a server for backup of all computers on the network. Each computer with its own copy of BackUp ToolKit can copy with customized configurations.

### **3.5 Back up your backup!**

Since it is possible that you may backup data that you later find unusable, we recommend regularly storing copies of your data on a CD or high capacity disk designated for backup copies only.

**Keep two sets of backup for different day of week; for example, keep one set for backups on even days and one set for backups on odd days.**

**If it is possible, burn a set of CDs of the source folder/volume regularly as a safeguard against a serious crash on your computer system.**

BackUp ToolKit offers a painless way to back up your important data. BackUp ToolKit combines powerful features in a very user-friendly interface. Make the most of it.

# 4 - The Different Modes of Backup

BackUp ToolKit allows several ways to perform a backup.

For each method, the principle used by BackUp ToolKit is the same: making a copy of the files and a copy of the folder structure (folders and subfolders) to the destination folder. The contents of the backup is similar to the one obtained via drag-and-drop copy from the Finder, but it's a lot easier and more efficient with BackUp ToolKit.

## 4.1 Manual Backup from the Desktop

Or the traditional Drag-and-Drop copying. You don't need BackUp ToolKit in this case for the backup. It's very inefficient, because this method overwrites all backups previously done. You can use BackUp ToolKit to restore the files to it's original folder/volume.

## 4.2 Using the Synchronization features

Unlike most backups, Synchronization works in both directions. The Programmed Synchronization mode is not recommended as a way to backup since any file that you have removed from your hard disk (but still remaining in the destination folder) would be copied back to your hard disk.

However, BackUp ToolKit's Immediate Synchronize feature does allow you to precisely control which files or folders to include and the direction of the copy (remember that synchronization can copy in both directions).

*Synchronization only copies files that are modified or newly created. Unmodified files are not copied.*

## 4.3 Immediate Backup

The easiest and quickest way to perform a one-time backup, or if you want to see and control which files will be copied. With this mode, you can do a full copy if all items are selected before running the backup.

Immediate Backup allows an «intelligent» backup, copying only selected files and folders. You can also enable the compression option to reduce the size of the backup.

## 4.4 Programmed Mirror Backup

Programmed Mirror Backup mode allows the easiest and quickest way to restore a folder or a volume.

Mirror backup creates an exact copy of a folder or an entire volume. The backup folder will be updated each time the backup runs (only modified or newly created files will be copied).

The backup needs a lot of storage space in the backup volume (as much as the original folder/volume). You can use the compress option which reduces the storage space considerably.

If scheduled to run daily, this is an excellent way to have a up-to-date copy of your hard disk. In the event of a disk problem, you can easily recover your work environment.

*Note: Keep in mind that any removed or corrupted file will delete/replace the original one in the copy.*

## 4.5 Programmed Evolutive Mirror Backup

**This mode offers the highest security, and an easy way to restore the data.**

This mode creates an exact copy (just like the Mirror Backup mode). However, when a file is modified, the copy of the older version of that file is moved to a «second level backup» folder prior to replacement by the newer version of the file. With Evolutive Mirror Backup, one can save multiple versions of each document. The backup is updated each time this action is perform at the scheduled time.

The biggest disadvantage of this mode of backup is the disk space needed for backing up to can be quite large and will most likely be greater than the size of the original folder or disk. Enabling the compression option can greatly reduce this space required for the backup.

If you have enough free space (for example, if you have a large external hard disk for your backup), this mode provides an excellent way to have a copy of your disk as well as the previous versions of each document. You will be able to use the latest copy to restore your disk, or to go back to a prior disk content or a clean version of a document.

The complementary data of an evolutive backup are saved, folder-by-folder, in special folders named «(fBACKUP.Evolutive.folder\*\*)». These folders are invisible folders, but you can make them visible in Settings or with one of the Tools menu

items. These folders contain previous versions of modified and deleted documents. If you exclude these folders, the copy obtained with this mode is similar to the copy done with a Mirror Backup. A «cleaning feature», in the Tools menu, can remove all the evolutive data inside a folder.

*Note: Use the options of this backup mode to limit the number of versions and the period of time they will be saved. This will clean the backup and prevent its size to grow up too much.*

*If you use the «evolutive cleaning» function in the Tools menu, you'll remove all «evolutive» data and will wind up with the same result as a Mirror Backup.*

## 4.6 Programmed Incremental Backup

This mode creates a relatively small sized backup.

Only a few files (or folders) will be saved for each backup, and only files modified since the last backup are copied.

This is a good way to bring your daily work with you on a small hard disk or cartridge.

It is also a way to preserve the last versions of a document.

This backup mode, which is only a partial backup, will not allow a full restoration of a volume or a folder. You should use it in combination with a Mirror Backup (for the complete content) to safeguard the important files you are working on.

# 5 - The Different Modes of Restoration

Unlike most of its competitors where the contents are backed up as one huge file, BackUp ToolKit's backups consist of copies of files, with the same folder structure as the original folder.

This approach has the huge advantage of allowing many ways to restore your files even without BackUp ToolKit (for example, in extreme situations where the entire disk content is deleted).

If the backup files are compressed, you will need BackUp ToolKit to uncompress them.

## 5.1 Manual Restoration from the Macintosh Desktop

This is the easiest way to recover a single file from the backup.

Once the volume containing the backup is mounted on the Desktop, you can use the Mac OS's Sherlock feature to find the file to recover from the backup. After the file is located, you can drag and drop it to its original location in your hard disk.

Manual Restoration can also be useful to copy an entire disk or folder into a new hard disk, or a newly formatted disk.

*Note: if the files in backup were compressed, you'll need BackUp ToolKit to recover the original files after they have been copied into the disk.*

## 5.2 Using Synchronization to Restore

Though not the easiest way to restore, synchronization nevertheless allows recovery of a folder or a volume.

You can use the Immediate Synchronization to control the files to copy, and the direction of the copy.

*Note: if the files in the backup were compressed, use BackUp ToolKit to recreate the original files after they have been copied onto the disk.*

## 5.3 Using Immediate Restoration

An easy way to restore files from the backup to their original place. Immediate Restoration is the recommended way to perform a restore.

All files that can be restored to the original place will be shown, and you can select

the ones you want to be restored.

## 5.4 Using the «Restore...» function

This mode is the most flexible for restoring your files and folders. It provides the maximum control of the files and the versions to be restored.

This mode is accessed from the main menu. You can select a backup action and then click the «Restore...» button (if no action is selected, the origin and backup folders are empty, and you'll have to select them).

As in the Immediate Restoration mode, the list displays a comparison result. You'll have to select the folders and files you want restored before clicking the «Restore» button.

You can restore an entire disk or a single file or folder using this mode.

## 6 - Main Window

The main window is displayed when BackUp ToolKit is launched. From this window, you can access most of BackUp ToolKit's main functions: immediate actions, programmed actions, etc....



Clicking on the buttons at the top of the window will open the immediate action windows (backup, restore, synchronize and compress).

The other part of the window is for programmed actions, to create and edit actions, running the programmed actions manually, selecting settings for restore, etc. The list displays the programmed actions that have been created, and their next scheduling.

- the first scheduled action is shown in blue with an alarm clock icon.
- the currently running action is shown in red and has a red round icon.

From the main window, you can create a new action, modify or remove an existing action. You can also:

- **suspend** any triggering of actions for a period of time (for example if you do not want to run an action during the next 30 minutes). If an action is currently running, it will be paused during this time period.
- **manually run** one of the programmed actions. Select the action and click the «Run Now» button.

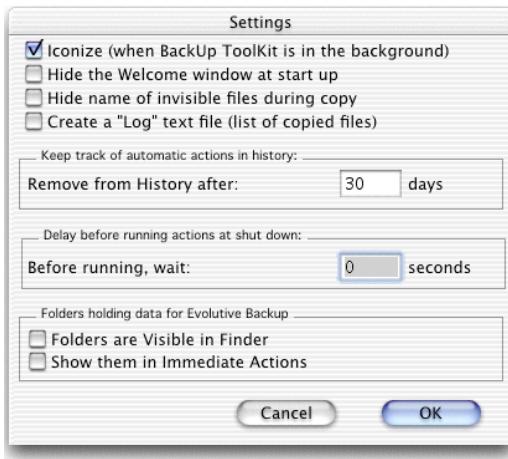
When an action is running, its progress is displayed at the bottom of the window, with the name of the currently scanned folder, the last file copied, the total number and size of the copied files, and the free space remaining in the destination volume. A

«Stop» button allows the action to be cancelled.

The «Restore» button opens the restore window (see the «Restore» chapter).

# 7 - Settings

Settings are accessed from the File menu.



The options are:

- **Iconize:** When BackUp ToolKit is running in the background, a small icon is shown on the top right of the screen if the Iconize option is checked.
- **Log File:** when running a programmed action, BackUp ToolKit can save the list of all files copied in a text file. The log file is saved in the «fBackUp ToolKit.logs» folder. Its name is created from the action name and the schedule date. A «log» file is created every time an action is run.
- **Remove from history:** after each programmed action executes, BackUp ToolKit saves the results that can be displayed in the History window (accessible from the Tools menu). Old histories are automatically removed--you can modify the duration they remain in the list.
- **Visible Folders for evolutive backup:** during evolutive backup, BackUp ToolKit saves data in folders named «(fBACKUP.Evolutive.folder\*\*)». These folder are normally invisible, but you can make them visible with this option.
- **Skip evolutive folders in Immediate Actions:** check this option to display these folders content inside the immediate actions.

The screen shot shows the default settings.

# 8 - Immediate Actions

«Immediate Actions» offers a quick and easy way to get into backing up, synchronizing two folders/volumes, or compressing documents.



Click the buttons on the top of the main window to open windows for each type of action: Backup, Restoration, Synchronization and Compression. Several immediate action windows can be opened at the same time, and actions can be performed simultaneously.

## 8.1 Immediate Backup

A backup copy is made of a folder's content (the folder to be backed up) inside the backup disk or folder. The backup will make an exact copy, including all folder and subfolder structures.

First step is to choose the folder to save and the destination of the backup. You can:

- Drag a folder or a disk from the Desktop to the areas on the top of the window,
- Click in these areas, and select the desired folder.

Once you have chosen the folder to backup and the destination, BackUp ToolKit will immediately analyze their content, and display the files and folders required to backup. Unchanged files, existing in both folders (origin and destination) are not displayed in the list.

If the destination folder does not contain any folder with the same name as the folder to backup, BackUp ToolKit considers that the actual backup is empty. All files and

folders from the folder to backup are displayed in the list.



Available options are:

- **Documents only:** If this option is enabled, only the documents can be selected for backing up. Applications and other extensions will be displayed, but cannot be backed up.
- **Replacing newer files:** In most cases, the backup contains files older than those from the original folder. But this is not true sometimes. One example is when older versions of files have been restored or re-installed. Checking this option will enable the replacement with older files. Note that, when a file is selected, the modification date is displayed below the list.
- **Deleting missing files:** In some instances, files removed in the original folder since the last backup will still be in the backup folder. If this option is enabled, BackUp ToolKit removes from the backup files that were deleted since the last backup.
- **Compress files:** Files will be backed up in a compressed format.

To perform a backup, select the desired files and folders, and click the «Backup» button. BackUp ToolKit will show the progress, and display «OK» for all files correctly copied.



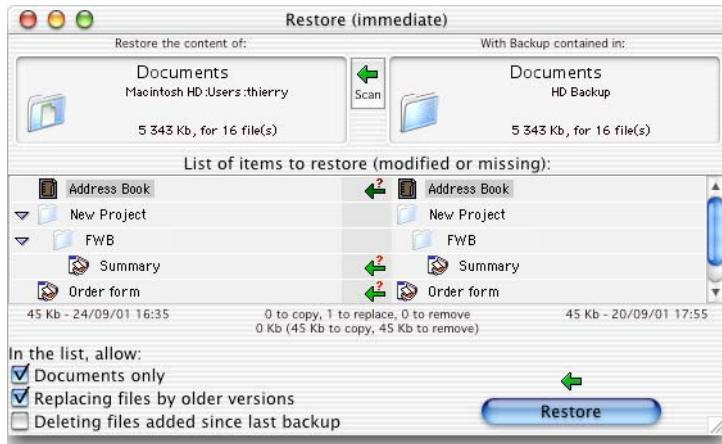
If you do a scan on the folders after the initial backup operation, BackUp ToolKit will only display files that are modified since the last backup.



In this screen shot, BackUp ToolKit indicates a newer version of the «Address Book» document, and a new document («New Document») in the original folder. There are also some changes in the folders («New Project») and («Screen Copy»)(if the contents of the folders are identical, they will not be displayed).

## 8.2 Immediate Restore

This operation compares files from a backup with the content of the original folder and displays the modified files. ***The backup must be contained in a folder with the same name as the folder to be restored to.*** To restore a file or a folder, select it and click the «Restore» button. You can shift-click to select more than one file to restore.



Available options are:

- **Documents only:** If this option is enabled, only the documents can be selected. Applications and other extensions will be displayed, but cannot be selected for restoration.
- **Replacing files by older versions:** In most cases, the backup folder contains files older than those from the original folder. For security reason, this option can be disabled to prevent replacing newer files with older or outdated files. Note when a file is selected, the modification date is displayed below the list.
- **Deleting files added since the last backup:** Files created or added to the original folder or volume since last backup will not be in the backup. With this option enabled, you can allow BackUp ToolKit to remove the files created since the last backup from the folder you want to restore to.

## 8.3 Immediate Synchronization

Synchronization compares the content of two folders, and displays only the differences (missing files or files that were modified since the last synchronization).



Once you have chosen the folders and files, BackUp ToolKit can **synchronize** them (the more recent is copied to replace the older, or the missing file) or **force the copy** only in one direction. Once the synchronization is completed, the content of both folders is identical.

## 8.4 Immediate Compression

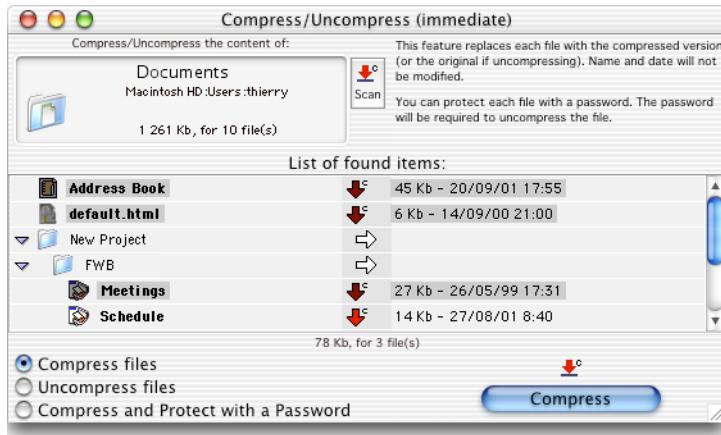
This function allows you to compress or uncompress files or folders. You can use compression, after a backup or for any files, to reduce the size of a folder. You can also use this feature to restore the original version of files that were backed up using the compression option.

You may also protect files with a password. Files are encrypted, and the original version will only be recovered if the correct password is entered before restoration or uncompression.

Each file is compressed independently. The compressed version has the same name and date, and replaces the original file. During an uncompress process, the original file will replace the compressed version.

The compression format used is a proprietary format. BackUp ToolKit will be required to uncompress the compressed file. Compressed files, as well as protected files, have a specific icon.

To run this action, choose the function (compress, uncompress or protect), select the files and click the button on the lower right hand corner.



**Caution: If you lose the password for the protected files, you will not be able to uncompress them. Neither FWB Software nor Tri-Edre (the developer of the product) will be able to recover the files for you.**

# 9 - Programmed Actions

When you want to run a backup on a schedule or when a specific action is used regularly, consider using a programmed action. All settings will be saved and can be executed as scheduled without your intervention.

You can create as many programmed actions as you want for automatic backup, synchronization and compression. Settings and schedule are specific for each action.



The main window displays the list of all current programmed actions. You can create, edit or remove these actions, and run an action immediately if needed.

## 9.1 Creating a Programmed Action

To create a programmed action, click the «Create New...» button or the little «+» button on the top of the scrollbar, or select the item in the Action menu (Cmd-N).

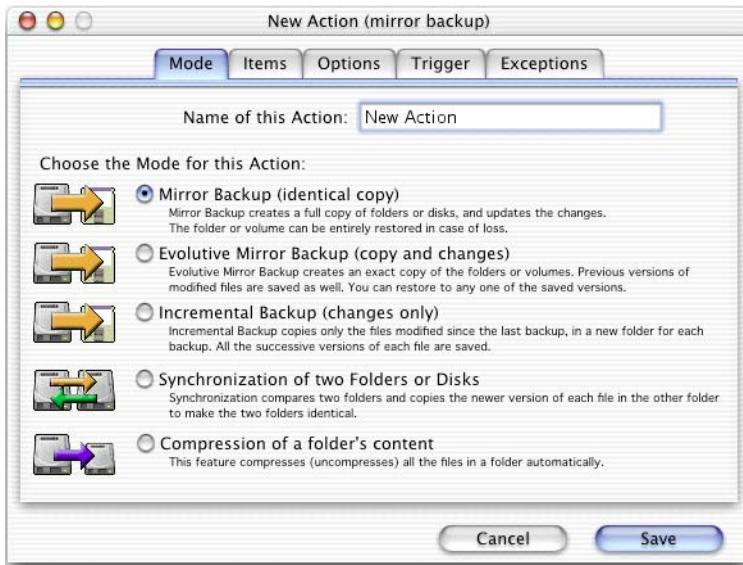
A dialog is opened, with panels for each type of settings:

- Mode for choosing the type of action.
- Items for selecting folders to backup or synchronize.
- Options for specifying options for the chosen type of action.
- Trigger for setting schedule for automatic run.
- Exceptions for setting filters to skip files or folders.

## 9.2 Choosing the Mode

With this panel, you give a name to your action. Using a descriptive name will make it easier for you to keep track of it when you have multiple actions.

BackUp ToolKit offers different types of actions, with three ways to do a backup, synchronization and compression.



- **Mirror Backup** creates an exact copy of a folder or a disk. All files are copied in the backup. Any modified or new file is copied in the backup, replacing the previous version. All unchanged files remain untouched in the backup. If the backup volume is full, BackUp ToolKit will ask for another volume to continue the backup.
- **Evolutive Mirror Backup** creates an exact copy of a folder or a disk, but saves old versions of files in a «second level» backup folder. All files are copied in the initial backup. Any new file or modified file will be copied in the subsequent backups. If BackUp ToolKit finds a modified file, the version existing in the backup is moved to the «second level» backup (and is not deleted) and the new version is copied in the backup. All unchanged files remain untouched in the backup. BackUp ToolKit also saves the content of the original folder. ***Evolutive Backup can backup to a single volume only. It cannot be split between multiple cartridges or disks. If the destination volume is full, the backup terminates.***

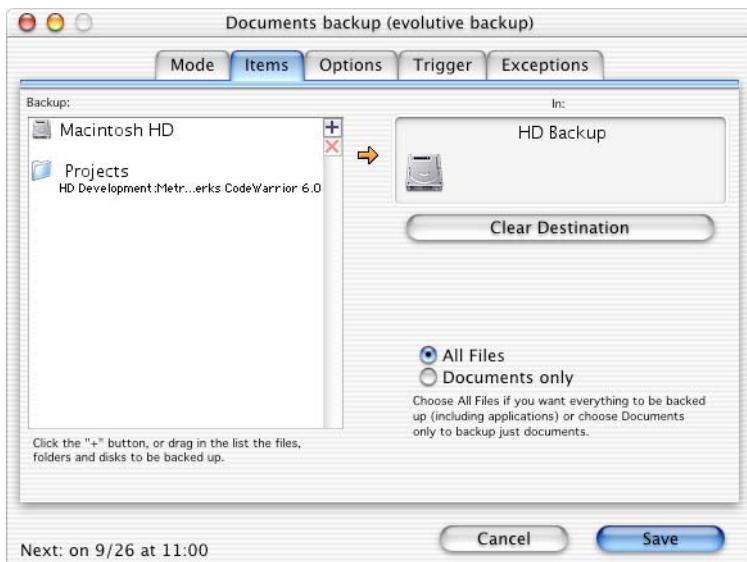
- **Incremental Backup** is a partial backup. It only copies files modified since the last backup. Each backup is performed to a new folder. If the backup volume is full, BackUp ToolKit will ask for another volume to continue the backup.
- **Synchronization** compares and makes two folders identical, by copying missing files and replacing the older version of a file by the latest one.
- **Compression** can compress or uncompress automatically the content of a folder. Compression is a handy feature to reduce the size of a folder where unused files are stored.

### 9.3 Choosing Items

You can choose from the Items panel the folders and volumes of which you want the content to be backed up, synchronized, etc.

You can drag items into the appropriate areas, or click on the area (or the «+» button in the scrollbar) to open the folder selection dialog.

Depending of the type of action, the panel can look slightly different.



For a backup, you can have a list of disks, folders and files, all of them being saved in the same destination folder (each one in a folder with the same name).

If no destination folder is chosen, BackUp ToolKit will ask for one when running the action.

Other options includes backing up all files, or backing up documents only (applications and extensions will not be copied). You can have more precise selection of files using the filters in the Exceptions panel described later.

For the «Synchronization» mode, the «Items» panel lets you select the two folders or volumes to synchronize.



In «Compression» mode, you can only select one folder or volume for compression.

### Alias of unmounted disks

In the BackUp ToolKit folder, there is a folder named «Alias». Put aliases in this folder for any volume used by BackUp ToolKit. If a volume is not found, BackUp ToolKit will try to mount it using the alias. The alias must have the same name as the volume.

## 9.4 Options panel

Options are specific for each type of action. They appear in the «Options» panel.

## Options for Mirror Backup

- **Compress Files:** copied files are compressed if this option is enabled.
- **Delete in the backup files removed in original:** if this option is enabled, a file in the backup with no equivalent in the original folder will be removed. With this option on, you'll have an exact copy of your disk, and all files removed in your folder will be automatically removed from the backup. Keep in mind that if you accidentally delete a file, it will also be removed from the backup.
- **Allow replacement of newer files:** files are normally older in the backup, except if you reinstall or restore to an older version. With this option checked, the file will be copied in the backup.
- **Partition the backup:** select this option if you want to limit the size of your backup folders. For example, you may want to limit each backup folder to 740MB in order to burn a set of CDRs for archives. The backup will be split into multiple folders whose name is the name of the action followed by a number: «#01», #02», etc. The size of each folder will not exceed the size specified, except if a single file has a size greater than that.



## Options for Evolutive Mirror Backup

- **Compress:** backed up files are compressed if this option is checked.

- **Backup size limitation:** with Evolutive Mirror Backup, new and modified files are added to the backup during each backup while the previous version of the files are moved to a separate folder. The storage space required for the backup will increase continuously until it runs out of space. With this options enabled, BackUp ToolKit will regularly clean the backup by removing older files after a specified time, if too many versions are saved, or if the remaining storage space is getting low. Note that there will be at least one version of each file saved in the backup.

*Note: BackUp ToolKit automatically cleans the backup if the free size in the disk is too low. But at least one version of each file (the last one) will be saved in the backup.*

### Options for Incremental Backup

- **Compress:** copied files are compressed if this option is enabled.
- **Delete Previous Backup:** with Incremental Backup, a new folder is created for each backup, and older versions are not deleted. To prevent the backup from growing out of control, this option allows you to delete the backup after a specified time. That way, only the latest versions of the folders in the backup will be kept.
- **Partition:** select this option if you want to limit the size of your backup folders. For example, you may want to limit each backup folder to 740MB in order to burn a set of CDRs for archives. The backup will be split into multiple folders whose name is the name of the action followed by a number: «#01», #02», etc. The size of each folder will not exceed the size specified, except if a single file has a size greater than that.

### Options for Synchronization

No options.

### Options for Compression

This panel chooses the mode, compression or uncompression of the folder's content.

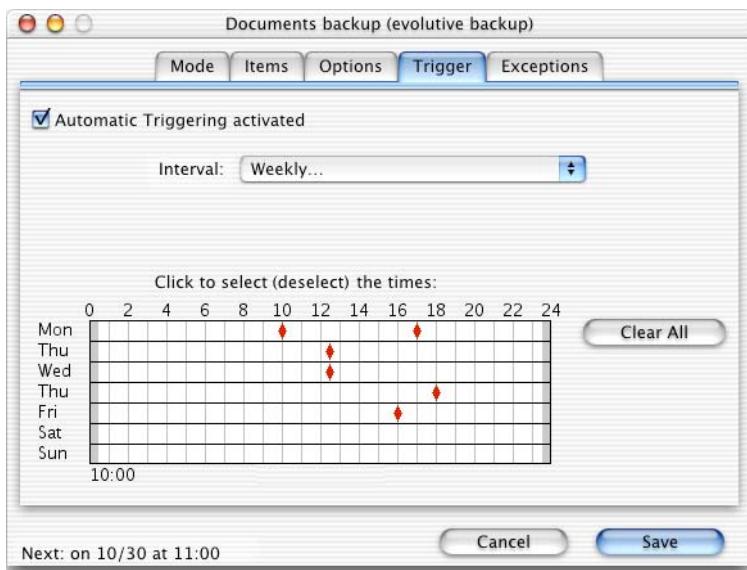
## 9.5 Trigger Panel

The scheduling settings offer a wide variety of choices to define when this action is automatically run.

- **Automatic Triggering:** you can globally deactivate or activate the scheduling with this option. At any time, you can run an action manually from the main window.

- **Interval:** this menu selects the time interval for BackUp: every hour, day, week or month.
- **Days selection:** if the «Every Month...» mode is selected, an edit field allows to enter which day(s) the action must be run. You enter the days separated with a comma. If you want this action to be run the 3rd, 7th and 21st of each month, enter «3,7,21» in the field.
- **Time scheduler:** you can add or remove trigger times (every 10 minutes). If, for any reason, the action could not be run at the right time, it will be run as soon as possible.

At the bottom of the dialog are displayed the last time this action was run, and the next one (except if the automatic triggering mode is off).



## 9.6 Exceptions

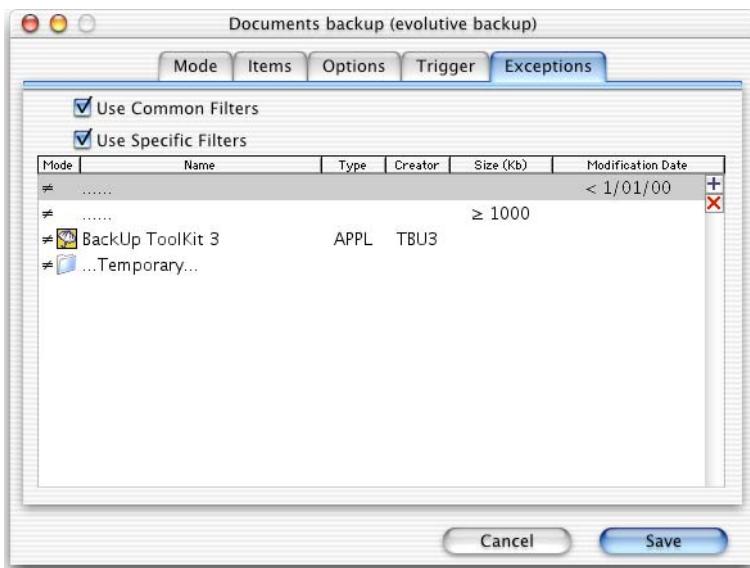
This panel is the place where you define the files and folders to be excluded from any backup action. You can also select the only files and folders to be backed up or synchronized.

There are common filters, used by all the actions. There are also specific filters for each action (they are displayed in the list). Both groups can be activated separately.

**A file or a folder must match all criteria of each filter to be accepted for the action. For example, in the screen copy below, any file older than 1/1/2000 or with a size bigger than 1000 Kbytes will be excluded.**

**Important: if no files were saved during a backup, make sure it is not due to bad filters. For example, if you exclude files greater than 1 Mbytes and files smaller than 1 Mbytes, you will not be able to save anything.**

You can add, edit or remove filters for this specific action, with the + buttons in the scrollbar or by double-clicking an item in the list.



To edit a filter, double-click it in the list.

The dialog offers different settings. Empty fields will be ignored.



- **Mode:** Files or folders can be excluded or included for the specific action.
- **Name:** Filter will check the name of files or folders.
- **Criteria (files only):** Mac Creator code, Type Code, size, and date can be used for filtering.

### Add an exception by drag and drop

A file or a folder can be dragged from the Desktop to the list (or the edition dialog).

# 10 - Restoration

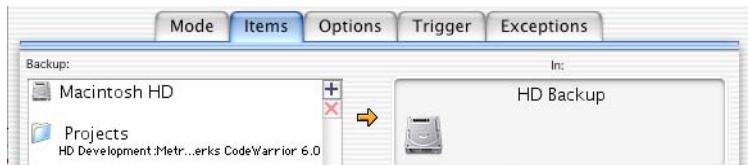
Restoration is a way to recover a folder or a volume and return it to a previous state. This chapter describes the many ways to restore (also read the «Different Modes for Restoration» chapter for additional information).

You are not limited to restoring a complete backup. You can restore a single file or a single folder from your backup folder. Just remember BackUp ToolKit's golden rule for a correct restoration: the name of the original and the backup folders have to be IDENTICAL.

## 10.1 Restoration constraints

During a backup, the content of each folder is copied into folders with same name as the original, from the top level to the lowest subfolder. The entire backup is contained in a folder having the same name as the folder or disk to backup. This rule allows the separation of multiple backup done in the same destination folder.

Let's try an example, with the backup of the «Macintosh HD» disk and the «Projects» folder into the «HD Backup» disk.



BackUp ToolKit creates two folders in the «HD Backup» disk, «Macintosh HD» (for the copy of the disk) and «Projects» (for the copy of the folder).



**To be able to restore a folder or a disk, BackUp ToolKit requires folders with the same name inside the folder or volume that house the backup.**

## 10.2 Restoration's powerful possibilities

You can choose any folder for restoration, provided that the names match the constraints.

That translates into very powerful control over the restore process. You can restore a subfolder from a backup, or restore a folder into any folder, or restore a complete new disk from a backup of your old disk, if you just change the name of the backup folder or the destination to follow the rule.

## 10.3 The Restore Window

The Restore Window controls the restoration. This window is opened via the «Restore» button at the bottom of the main window.

If you select an action before clicking the Restore button, origin and destination folders will be set with the parameters of the action.

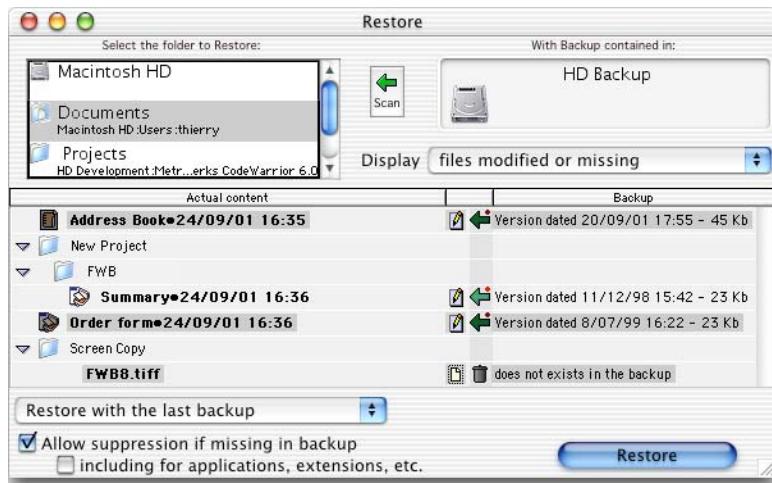
You can also drag folders or disks into the list and the backup area from the Restore Window.

The list displays the content of the selected item in the list of folders and disks to restore (top left of the window), compared to the content of the backup.

The **Display popup menu** modifies the list of the comparison results, allowing all files, or only modified or missing files.

In the screen shot below, BackUp ToolKit shows a comparison between the «Documents» folder and its backup in the «HD Backup» disk. When files exist in both original and destination folders, the date is displayed for both files, to allow verification before any restoration.

If files only exist in the original folder, or in the backup, they are displayed with a specific icon.



These icons are in the center of the list, depending of the status of each item:

- **Edition Icon with a pen** (such as the one for «Address Book» file in the screenshot above) shows a file existing in the original and the backup, but which was modified since the last backup. The associated icon (the green arrow) means that the file can be restored, replacing the file in the original with the file from the backup.
- **New Document icon** (such as the one for «TBU4.tiff» file in the screenshot above) shows files that are in the original folder, but not in the backup. This can be due to a newly created document. This can also be because of a filter exception, passing this file during the action. If removing is allowed (from the bottom options), a Trash icon is displayed for this file.
- **Red cross icon** shows a file existing in the backup, but not in the original. This file can be restored.
- **Multiple versions icon** indicates, for an evolutive backup, that there are multiple versions of the same folder existing in the backup. You can select any one of the versions for restoring.

The options at the bottom allow removal of files that exist only in the original folder, and not in the backup.

- **Allow suppression:** files that can be removed from the original folder can be removed if this option is checked. Note that they may be not copied because of filters or other reasons.
- **Restore menu:** this menu is available for evolutive backup.

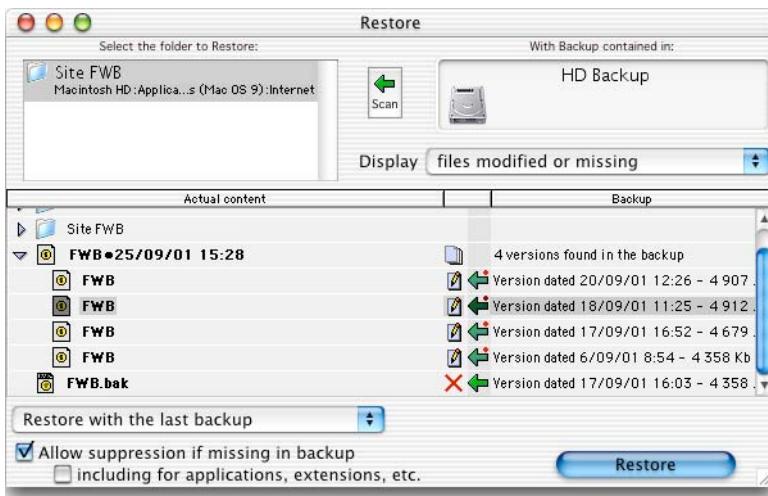
You can restore all or part of the backup.

To restore, select the desired items and click the Restore button. As a security precaution, BackUp ToolKit will copy all files that will be replaced or removed into a security folder (see below).

## 10.4 Restoring with an Evolutive Backup

An Evolutive Backup can save multiple versions for each document. In this case, BackUp ToolKit allows you to restore one of these versions.

The available versions of a file are displayed in the list. For each version, the date and the size are displayed.



To restore a particular version of a file, highlight it from the list and click «Restore».

The «Restore with...» popup menu can allow you to specify a date used to automatically select the correct version of the files.

## 10.5 Security Folder for Restoration

We recommend, when running a restoration, to copy files that will be replaced or removed to a specific folder, created at the root of the disk. The Security Folder's name contains the restoration date, for example «fBUTKSecure 010912 1427» for a

restoration done the September 12, 2001 at 2:27 pm.

Files in the Security Folder save the folders and subfolders structure. With the restoration features, it's easy to reinstall some of these files in case of mistakes in the restoration process, or you simply want to go back to the previous documents.

# 11 - Other Features

## 11.1 Common Exceptions

Accessed via the «Tools» menu, you can open the exception editor. It's similar to the exception panel (in the programmed action editor). Use it to add, modify or remove exceptions.

*Note: See the chapter «Programmed Actions» for more information on Exceptions.*

## 11.2 History of Programmed Actions

Each time an action is executed, the result is recorded in the history. The list of the latest actions is displayed using the «Tools» menu.

If the option allowing the creation of Log files is on, you can display the text file for a list of saved items.

You can specify how long a log file remains in history.

## 11.3 Compression/Uncompression

Files can be compressed to reduce storage space for the backup folder. They are automatically uncompressed during restoration.

You can also uncompress a file with the compress/uncompress action.

If you double-click a compressed file from the Finder, BackUp ToolKit will launch and display a dialog prompting you to uncompress it. The uncompressed file will be replaced by the compressed version.

If a file was protected, BackUp ToolKit will prompt for a password before uncompressing the original file.

**BackUp ToolKit's compression format is a proprietary format. You'll need BackUp ToolKit to recover the original file.**

## 11.4 Cleaning an Evolutive Backup

When running an evolutive backup, data is saved to a «second level» backup. It is saved into invisible folders, named «(fBACKUP.Evolutive.folder\*\*)».

A «Tools» menu item allows you to remove this data from a folder. Removing these

invisible folders yields a backup identical to a Mirror Backup.

## 12 - F.A.Q.

### **Q: What is the best backup mode I can choose?**

A: It depends on your needs. Read the «Different Modes for Backup» chapter.

### **Q: I have no time to read the manual for now. How can I make a first easy backup of my hard disk?**

A: Choose the Immediate Backup action from the main window. Drag your hard disk icon in the area at the top left. Drag the external hard disk to the area at the top right. Select everything in the list and click the «Backup» button.

### **Q: Nothing was backed up when running a backup. Why?**

A: Only files matching the filters (documents, exceptions, etc.) are saved. With an Incremental Backup, only files having a modification date newer than the last backup are saved.

### **Q: I just created an incremental backup, but nothing was saved, why?**

A: For incremental backup, only files having a correct modification date (between last backup date and now) are copied. The «last backup date» is initialized with the date of the configuration creation, so it may be normal that nothing is saved. You can change the last backup date in the Edit Configuration dialog. Use a Mirror backup to create the initial backup if you want to have a backup of everything in the volume.

### **Q: I moved files to the folder I backup (with an incremental backup), but they are not copied during the backup, why?**

A: Incremental backup only copy files with a correct modification date (between last backup date and now). If the files added have an older date, they will not be copied.

### **Q: My backup disk is nearly full. It contains my Evolutive Backup. How can I clean it?**

A: The «Tools» menu offers a function that cleans all «evolutive data» from any folder. That way, you can clean your entire disk, selected folders with big files, or versions of the files you will never need to access again.

If you do not want to remove the specific data of an Evolutive Mirror Backup (older versions, etc.), you should consider restricting the time items are saved, or the number of items in the «evolutive second level backup». These options can be modified in the «Options» panel, when setting the Evolutive Mirror Backup action.

**Q: Sometimes, a file named «TEDEV.TemporaryFile.1247853912» appears and disappears during a backup. What is that file?**

A: BackUp ToolKit creates a temporary file when backing up and compressing a file. This file can appear briefly when a big file is involved.

**Q: What are these folders named «(fBACKUP.Evolutive.folder\*\*)» on my hard disk?**

A: They contain the «second level backup» data for evolutive backup. They are invisible folders by default.

**Q: How do I make the folders «(fBACKUP.Evolutive.folder\*\*)» invisible?**

A: Use Settings from the File menu to make these folders visible or invisible. The setting will take effect during the next backup if you change it.

**Q: I deleted an important document by accident, but I am sure it was backed up. How can I recover it easily?**

A: The easiest way is to mount your backup volume, then search for the file with Sherlock and copy it back to the original folder via drag and drop. You can also use the restore features from BackUp ToolKit. See the chapter «Different Modes for Restoration».

**Q: How do I restore a backup to my hard disk (from a mirror or an evolutive mirror backup)?**

A: Select the configuration used for the backup, and click the “Restore” button. Select the folder/disk to be restored in the top left list. The files that can be restored are displayed in the list. Select those that you want to restore, and click the «Restore» button.

**Q: How do I restore a backup from multiple cartridges?**

A: Select the configuration used for the backup, click the “Restore” button. If the destination folder is undefined, BackUp ToolKit will prompt to insert a cartridge. Repeat for all the cartridges.

**Q: Is a compressed file automatically restored uncompressed?**

A: Yes. During the restore process, all compressed files are automatically uncompressed before being restored.