Using BlueStep Backup™

BlueStep™ Backup

Your data is an invaluable resource. To protect and store critical digital documents and files, BlueStep Technologies offers the ideal technological solution - BlueStep Backup™.

BlueStep Backup™ allows you to make an identical copy of a folder tree at one location and store it to one or more other locations, including off-site storage via BlueStep's Data Vault. It provides an easy-to-use backup scheduler, allowing you to 'set it and forget it'.

Setting Up

BlueStep Backup need only be set up once on your computer and will operate continuously to provide backup security for your files, unless you disable the backup task, quit or delete the program. Start the set up by accessing the http://backup.bluestep.net website. Locate the download links.

There are two methods of downloading the backup utility, one using Java Web Start and an alternate requiring a manual download from a zip file. We heartily recommend using the Java Web Start download. The manual download is provided for the rare circumstance where Java Web Start will not function on your computer.

On the backup website, click the link seen at ● Use Java Web Start to run BlueStep Backup. Click the Yes button in the resulting security pop-up to proceed with installation. The active installation screen will display, seen below, and automatically close when done.

In some instances, a second security warning window may appear. The purpose of this window is to inform you of certain internal program conditions. The conditions described are not harmful to your computer and you are safe to click the Yes button.

Several installation pop ups will be seen, followed by a Sun Microsystems, Inc. license agreement window. Please read the information contained in the agreement and select "I accept the terms in the license agreement", then click the Next button.
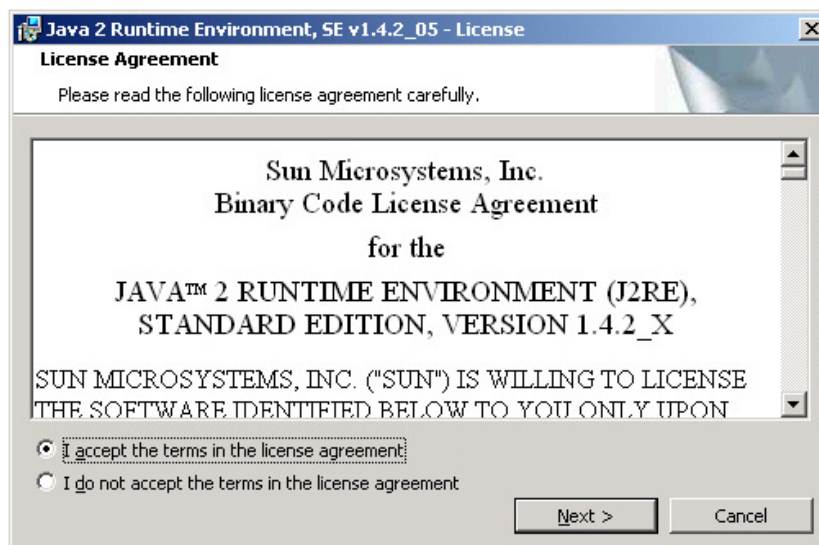
The Setup Type screen allows you to select between typical and custom installation.

➤ Typical – All recommended features will be installed.
➤ Custom – Specify the installation directory and choose which program features to install. You can change your choice of features after installation by using the Add/Remove Programs utility in the Control Panel. Recommended for advanced users.

Select one of the options and click the Next button. The install wizard proceeds to run. Please be patient, as the wizard may take several minutes to complete.

When the 'completed' screen appears, click the Finish button. Java Web Start automatically loads and another warning screen appears. Since Sun Microsystems does not review BlueStep Backup code, they provide this disclaimer in case there is a problem with the program. Please click the Start button.
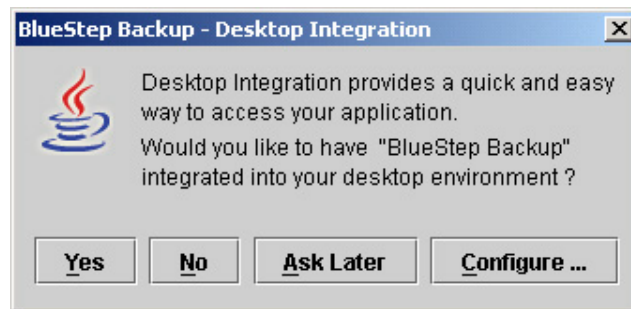
Desktop Icons
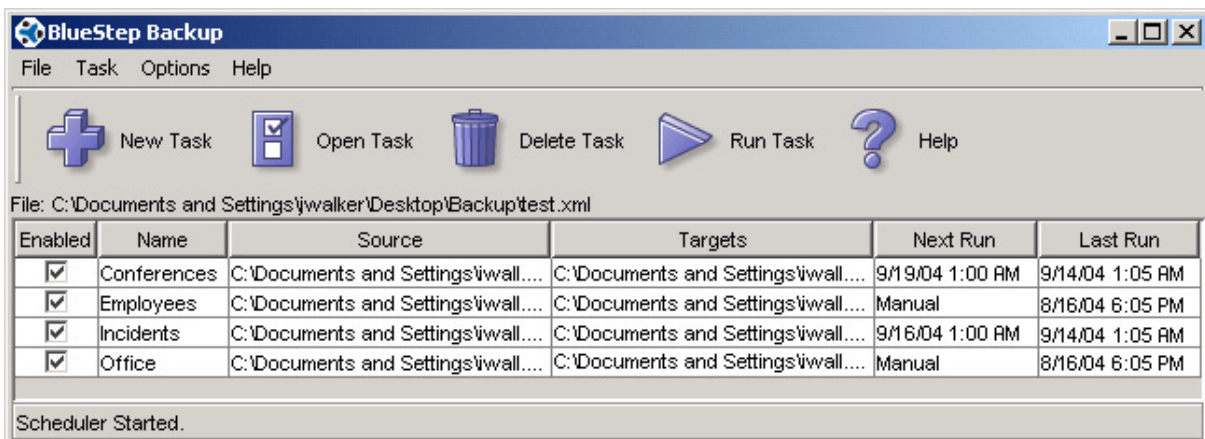
BlueStep Backup™   **Java™ Web Start**

It is recommended that you add the BlueStep Backup and Java Web Start icons to your desktop using the Desktop Integration pop-up, seen below. This provides very convenient access for backing up your critical data at a moment's notice, if needed, or to change your scheduling properties at any time.

BlueStep Backup - Desktop Integration

Desktop Integration provides a quick and easy way to access your application.

Would you like to have "BlueStep Backup" integrated into your desktop environment ?

| Yes | No | Ask Later | Configure ... |

Scheduler Functions

As soon as you have made a selection on the Desktop Integration pop-up, the BlueStep Backup scheduler is ready for use. The example below shows the scheduler after several backup tasks have been created and run.

BlueStep Backup

File   Task   Options   Help

New Task   Open Task   Delete Task   Run Task   Help

File: C:\Documents and Settings\jwalker\Desktop\Backup\test.xml

Enabled	Name	Source	Targets	Next Run	Last Run
☑	Conferences	C:\Documents and Settings\iwall....	C:\Documents and Settings\iwall....	9/19/04 1:00 AM	9/14/04 1:05 AM
☑	Employees	C:\Documents and Settings\iwall....	C:\Documents and Settings\iwall....	Manual	8/16/04 6:05 PM
☑	Incidents	C:\Documents and Settings\iwall....	C:\Documents and Settings\iwall....	9/16/04 1:00 AM	9/14/04 1:05 AM
☑	Office	C:\Documents and Settings\iwall....	C:\Documents and Settings\iwall....	Manual	8/16/04 6:05 PM

Scheduler Started.

The scheduler displays all current backup tasks with their details listed in columns.

- **Enabled –** Checked or unchecked. A checkmark in this column indicates that the task is operational and will be run at the scheduled time. You may turn off selected task backups by unchecking the Enabled field.

- **Name** - Shows the task title. You may edit the default or existing name by selecting Rename under the Task drop-down or by double-clicking on the name field.

- **Source** - Displays the location of the files that are being copied for backup. Source data may be edited by clicking the Open Task button or by double-clicking on the task fields (other than the name field).

- **Targets** - Signifies the destination(s) for the copied files. Target data may be changed by selecting Open Task or by double-clicking on the task fields.

- **Next Run** - Indicates the date and time the next backup is scheduled to take place or if it is set to be manually operated.

- **Last Run** - Shows the date and time the last backup took place.

Scheduler Icons

New Task - Creates a new line on the task list, with some column fields filled in with default data – Enabled (Checked), Name (New Task), Source (from the default user directory) and Next Run (set as Manual). You may edit the name by double-clicking in the name field. Use the Open Task icon or double-click on the remaining fields to edit all other task properties.

Open Task - Opens the Task Properties screen for the selected task to allow editing of fields. From this screen you select the data source and target(s) and set the schedule.

Delete Task - Removes the selected task from the scheduler and eliminates backup of those files.

Run Task – Performs an immediate manual backup of the selected task(s).

Help - Provides access to BlueStep Backup help documents through the backup website at http://backup.bluestep.net/.

Scheduler Operations

File

```
New        Ctrl+N
Open ...    Ctrl+O
Save       Ctrl+S
Save as...
Quit
```

New (Ctrl+N) - Creates a new line on the task list, with some column fields filled with default data. These may be edited using Open Task icon, the Open command (Ctrl+O) or by double-clicking the line.

Open … (Ctrl+O) - Opens the selected Task Properties screen. You may edit the Source and Target items and set the schedule.

Save (Ctrl+S) - Stores the current tasks, settings and schedule to a selected .xml file.

Save as … - Allows you to store the current tasks, settings and schedule to a different .xml file from the default file.

Quit – Closes the scheduler program, **discontinuing any scheduled backups**.

Task

```
New
Open...
Rename
Delete          Delete
Run Tasks              ▶
Restore Files...
```

New - Creates a new line on the task list, with some column fields filled with default data. These may be edited using Open Task icon, the Open command or by double-clicking the line.

Open … - Opens the selected Task Properties screen. You may edit the Source and Target items and set the schedule.

Rename - Allows you to edit the name of the selected task. This may also be done by double-clicking the selected task name field.

Delete - Removes the selected task from the scheduler and eliminates backup of those task files.

Run Tasks - Allows you to immediately perform a manual backup of the selected task(s). You may select backup for All, Enabled or Selected tasks.

Restore Files - Recopies the backup file(s) to their original source.

Options

```
Look and Feel          ▶
✔ Show Toolbar
Launch at Startup
Encryption...
Show Status...
Show Logs...    Ctrl+L
```

Look and Feel - Alters the look of the scheduler window. You may select from Metal, CDE/Motif or Windows (default).

Show Toolbar - Displays the large icons New Task, Open Task, Delete, Run Task and Help within the scheduler window. The default is set to show the toolbar unless otherwise selected. Click to disable toolbar.

Launch at Startup - Provides automatic access to the scheduler when starting up your computer. Click to enable.

Encryption – Allows access to a window where you may generate random encryption keys in order to store your backup files in an encrypted format. It is particularly important to save any keys you have generated on a disk, document or CD in a secure location, so that you will have access to these keys for future use. Once another key has been generated with this screen, you must restore the original key to decrypt any files that were previously stored in encrypted format. **No encrypted file can be accessed or restored without its corresponding key.** See encryption discussion under **Target Folders**, below, for further details.

Encryption Dialog example:

Show Status – During manual operation, you may choose to display status statistics. You will be able to see the file name as each is being backed up, including the total number of files during this backup operation. Any errors that were generated during the original setup of the backup task will also be shown and you may correct them for successful backup operation on automatic timed settings.
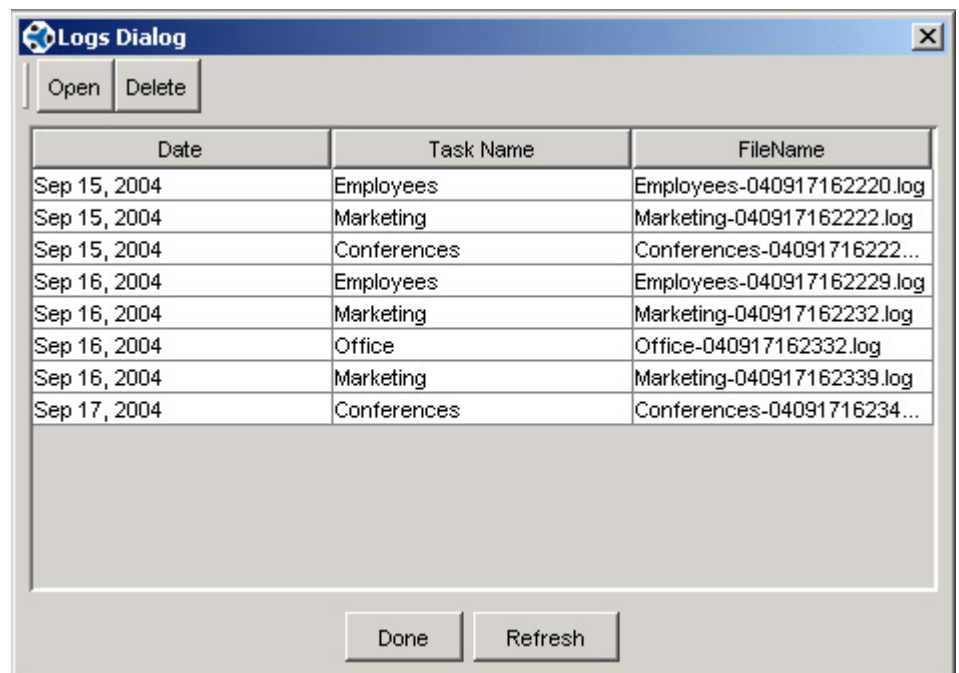
Status example:
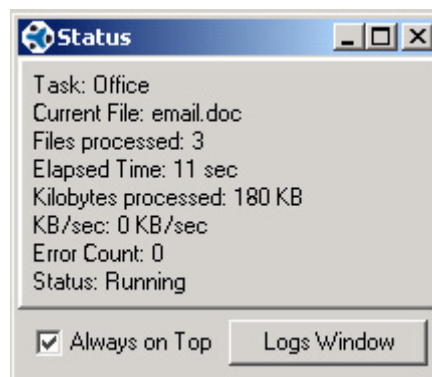
Show Logs (Ctrl+L) – Displays a listing of all tasks that have been run by date, name and file name. You may click on an individual line item in the log for more details about the specific backup transaction.

Logs Dialog example:

Help

Content (F1) - Provides access to BlueStep Backup help documents through the backup website at http://backup.bluestep.net/.

About … - Displays software development information.

Task Properties

The Task Properties screen, seen below, is the main resource for setting and controlling file backups. It is divided into Source Folder, Target Folders and Schedule sections.
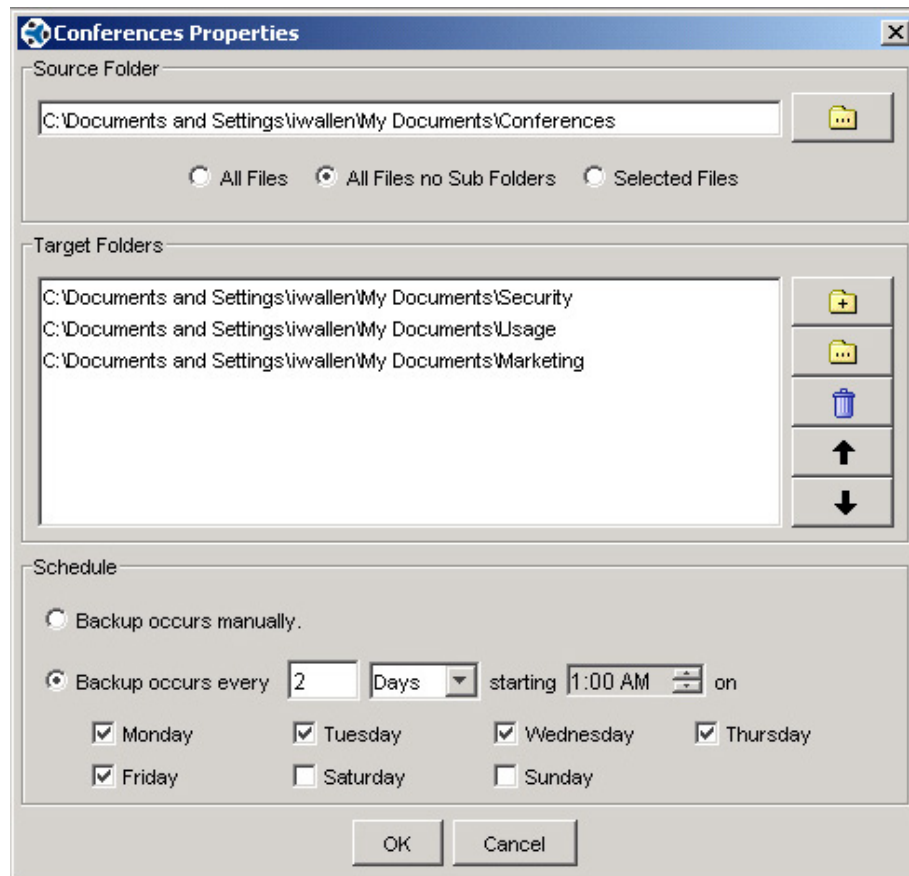
Source Folder
The first section, Source Folder, sets and identifies the origin of the files you wish to backup. The default displayed in the folder window is from the user's default directory. You may search for other files or folders by clicking the Browse button . Clicking browse produces a Path pop-up.
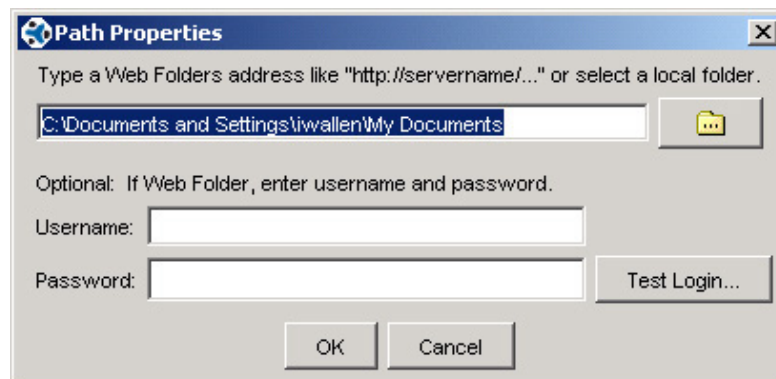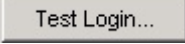
In this pop-up, you may type in a BlueStep Data Vault address, a Web Folders address, known file path on your hard drive or click the Browse button. If you choose to type in a BlueStep Data Vault or Web Folders address, you must also enter your username and password for those files. Using the Test Login button [Test Login...] allows you to test for the correct username and password for these files before attempting to run the backup.

If you choose the Browse button, a file tree window appears, example below. You may double-click on folders to display the subfolders. Individual files will not be shown. When you have selected a source folder, click the Open button.
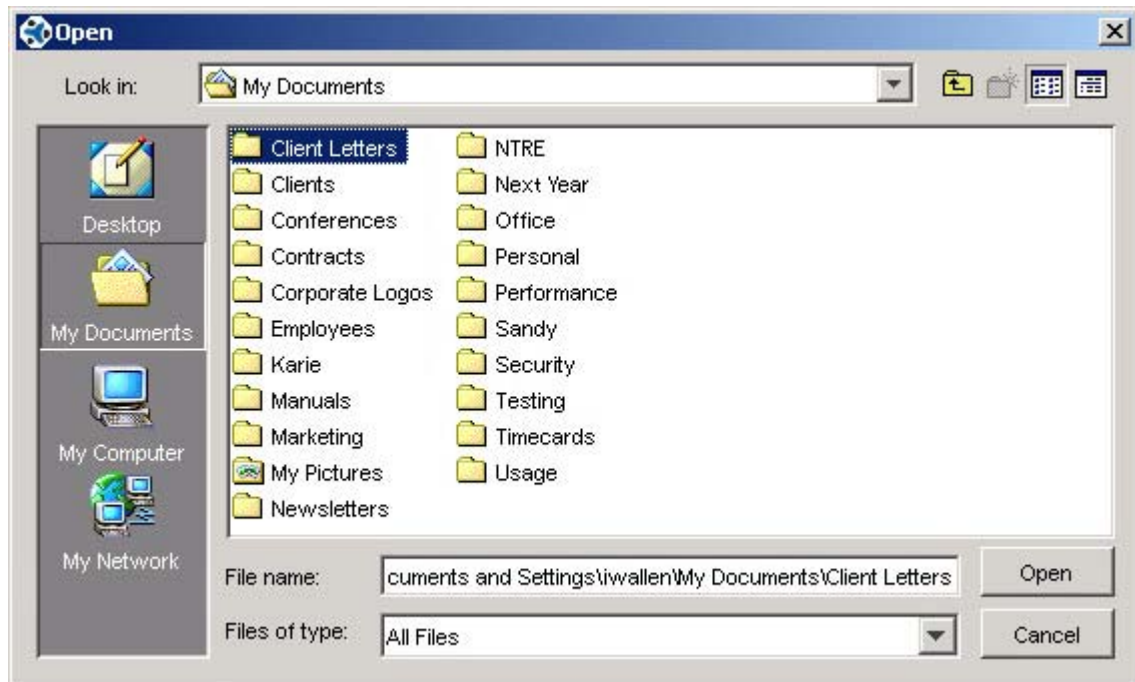
You will be returned to the Path Properties pop-up. If the folder selection is correct, click OK. You will be returned to the Task Properties screen.

➤ Please note that desktop navigation is shown on the screen above. Any items on the desktop that are represented by shortcut icons (BlueStep Data Vault and Web Folders, particularly) cannot be sourced from this screen. You should enter their web address or similar address in the Path Properties pop-up, i.e. http://www.bluestep.net/files/27424/. Any desktop items that are **not** represented by shortcuts may be sourced through the screen above.

On the Task Properties screen, you will be able to select which files within the chosen folder (now displayed in the address bar) will be copied. Click one of the three selections.

- **All Files** - Selects all files within the chosen folder, including subfolders and their content

- **All Files, no Subfolders** – Selects all files within the chosen folder, but none of the subfolders or the subfolder content

- **Selected Files** – Opens a browse window (example below) to select specific files from the file tree, starting at the selected folder

Selected Files
On the Selected Files pop-up, click the checkboxes for all files you wish to select for backup. When selection is complete, click the OK button. You will be returned to the Task Properties screen.
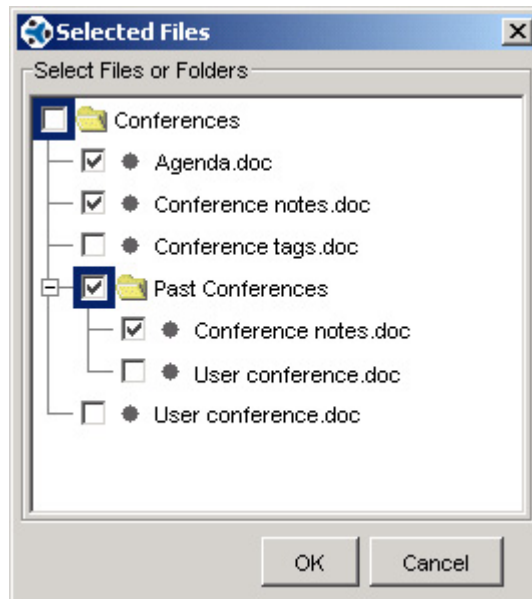
Target Folders
The second Task Properties section is Target Folders. To select a place for your backup files to be stored, click on the Add Folder button [image]. A Path pop-up appears, seen below, which is used in the same manner as described above in **Source Folder**, but with additional storage features also available.
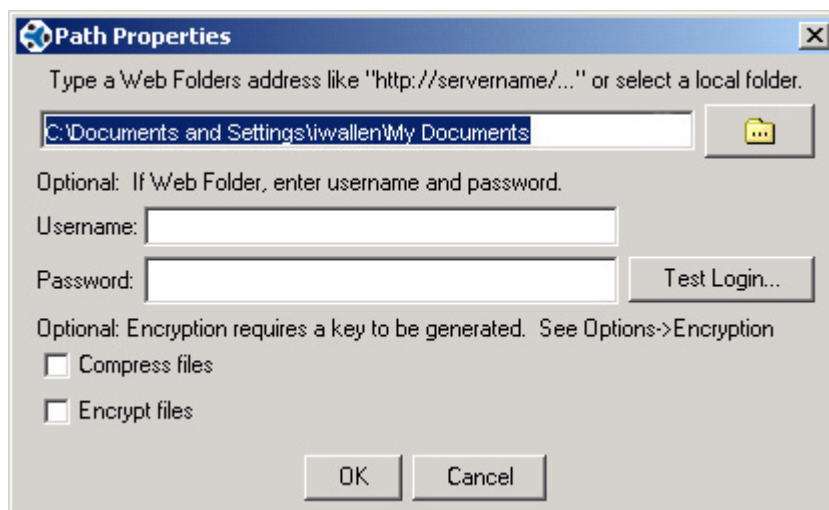
The additional options allow you to store the file as a compressed file or in encrypted format. Compressed files take less storage space, which is particularly valuable if you have a large volume to store. Encryption provides for added security in the storage of critical information.

If you choose to encrypt the file, an encryption key must first be generated. To do so, click the Options link in the Scheduler Operations bar, then the Encryption selection.
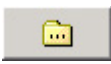

On the Encryption Dialog box, clicking the Generate Key button will produce a random key, such as seen above. Click OK. This key will be used to encrypt all subsequent documents (on which you have selected the encryption feature) until you change the key by generating a new one using the button or manually entering characters. If you have generated more than one key, you **must** restore the original key to decrypt any files that used the original key for encryption. To do this, manually enter or copy-and-paste the original key into the window and click OK.

⚠ It is vitally important to save all encryption keys on disk, document or CD in a secure location. If you are storing critical documents off-site for security or safety reasons, the key should be stored in like manner. **No encrypted file can be accessed or restored without its corresponding key.** As an added precaution, you may store multiple copies of the keys in secure locations and identify which keys apply to which files.

For Advanced Users Only. BlueStep's Encryption Dialog employs 128-bit encryption – Advanced Encryption Standard (AES), as used by the U.S. Government and other entities for standard security. To learn more about this and other encryption options, visit http://java.sun.com/ and look for Java Cryptography Extension (JCE) - Unlimited Strength Jurisdiction Policy Files 5.0.

Once you have clicked the OK button on the Encryption Dialog, then OK on the Path Properties pop-up, you will be returned to the Task Properties screen, where the folder (or folder and file) will be displayed in the Target Folders window. Additional target folders may be selected, as many as desired, by clicking the Add Folder button [icon] and repeating the target selection process.

You may use the Browse button [icon] to search for subfolders. Select an existing target by clicking on its name in the Target Folders window, then click the button. This opens a Path Properties pop-up where you may type in the address or browse further, as described above in **Source Folder**.

To change any selections made for the target(s), double-click the name of the target and the Path Properties pop-up will reappear, ready for any edit. Remember to click the OK button when your changes are complete.

To delete a target, select an existing target, then click the Delete button [🗑] . The target folder will be removed.
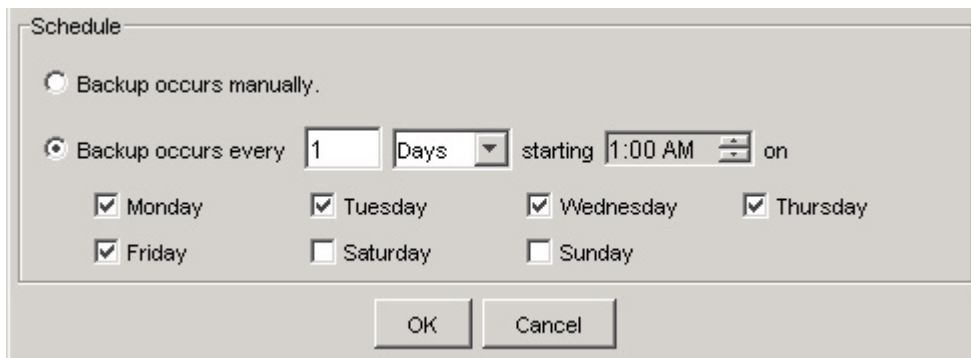
You may use the up or down arrows [↑] [↓] to reorder the target list. Click on an existing target, then click the desired arrow.

Schedule

The Schedule section allows you to set your desired backup schedule for the specific task using selection parameters. There are two initial options.

- ■ Manual – Choose this option if you wish to manually operate this backup task instead of allowing the schedule to run automatically.

- ■ Backup occurs… – Choose this option if you wish to set an automated backup schedule for this task. Enter a number in the first field to indicate the numeric value. In the second field, select Minutes, Hours or Days on the drop-down to indicate the interval. Set the start time by clicking the up or down arrows for the appropriate hour in the third field. Uncheck any days of the week that you do not want the backup to run.

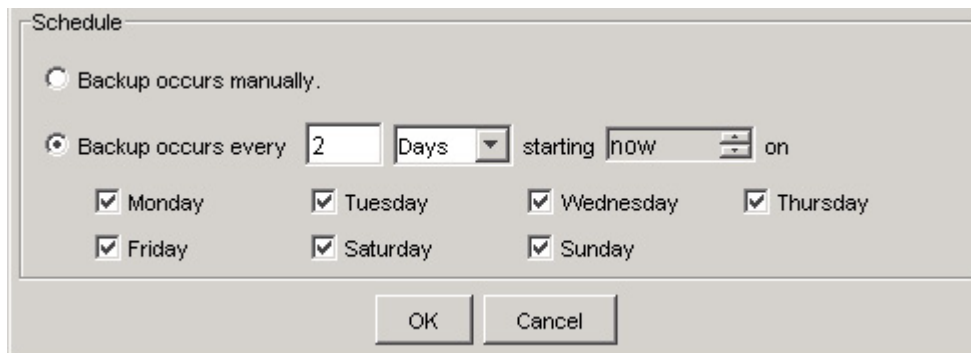In the example below, the schedule is set to run every day at 1:00 AM except Saturday and Sunday.

In this second example, below, the schedule is set to run every other day beginning immediately.

If you choose the 'Now' selection in the time field (third field), the backup will operate immediately whenever the scheduler is started – that is, whenever you save the scheduler, when you log in or when you run any schedule task.

When you have completed schedule selections to your satisfaction, click the OK button. You will be returned to the Backup screen.

No backup operations will take place until you save the complete backup list – as noted on the bottom of the Backup screen. To save, select the File link from the Scheduler Operations bar and click the Save selection. You may then close the Scheduler or run any schedule tasks manually.

To close the Backup window, click one of the Close or Minimize buttons in the upper right corner. This places the BlueStep icon in your tray. If the settings for the backup tasks have not been saved, you will be asked if you want to save them. Clicking the Yes button will store the settings.

Closing the Backup window does not 'Quit' or turn off the backup functions, but simply allows them to run in the background as long as your computer is turned on. If you wish to shut off the backup utility entirely, click the File link, then select the Quit option. The backup tasks will be saved, but no backup activity will take place.

Step-by-Step through BlueStep Backup™

Initial Setup of BlueStep Backup™
- Access http://backup.bluestep.net Locate the download links
- Click the link seen at ● Use Java Web Start to run BlueStep Backup
- Click the Yes button in the resulting security pop-up
- If a second security warning window appears, click the Yes button
- Read the Sun Microsystems license agreement and select "I accept the terms in the license agreement"
- Click the Next button
- Select either the typical or custom set up option and click the Next button
- Click the Finish button
- Click the Start button on the security warning
- Select Yes, No, Ask Later, or Configure on the desktop icon pop-up

Setting up a Backup Task
- Open BlueStep Backup by clicking on the icon on your desktop or tray
- Click New Task or the New selection (Ctrl+N) under the File link
- Double-click in the task name field or select the task and click Rename under the Task link
- Double-click in any other task field or select the task and click Open under the Task link
- **Source**
- Enter a Source Folder by typing in an address or clicking the Browse button
- If you have clicked the Browse button, type in a path, address or click the second Browse button
- If you have clicked the second Browse button, select a file from the file tree displayed
- Click the Open button
- On the Path Pop-up, click the OK button

- Select either All Files, All Files no Subfolders, or Selected Files
- If you have chosen Selected Files, check the desired files from the file tree
- Click the OK button

Target
- Enter a Target Folder by typing in an address or clicking the Browse button
- If you have clicked the Browse button, type in a path, address or click the second Browse button
- If you have clicked the second Browse button, select a file from the file tree displayed
- Click the Open button
- On the Path Pop-up, click the OK button
- Repeat the Target Folder selection for as many destinations as you desire

Schedule
- Select either Manual or Backup occurs…
- If you have selected Backup occurs…, enter a number in the first field
- Select Minutes, Hours or Days in the second field
- Click the arrows to the appropriate hour in the third field
- Check one, some or all of the weekday boxes
- If you are satisfied with the schedule parameters, click the OK button