



Plan the Backup before the Storm



Backups for disaster recovery require that you think about what you will need to recover from a disaster, and how you will find it when a computer is, well, gone. Some early planning will save a lot of time and money when the lightning strike hits. Or the pandemic. We may have already sailed off the edge of the map.

When you back up a computer, the software will generally back up your documents, pictures, music, bookmarks, and the settings for your account inside Windows. That's just a data backup, sometimes called a profile backup. It's your docs, basically. It isn't good enough to put back all your stuff, because it does not include software.

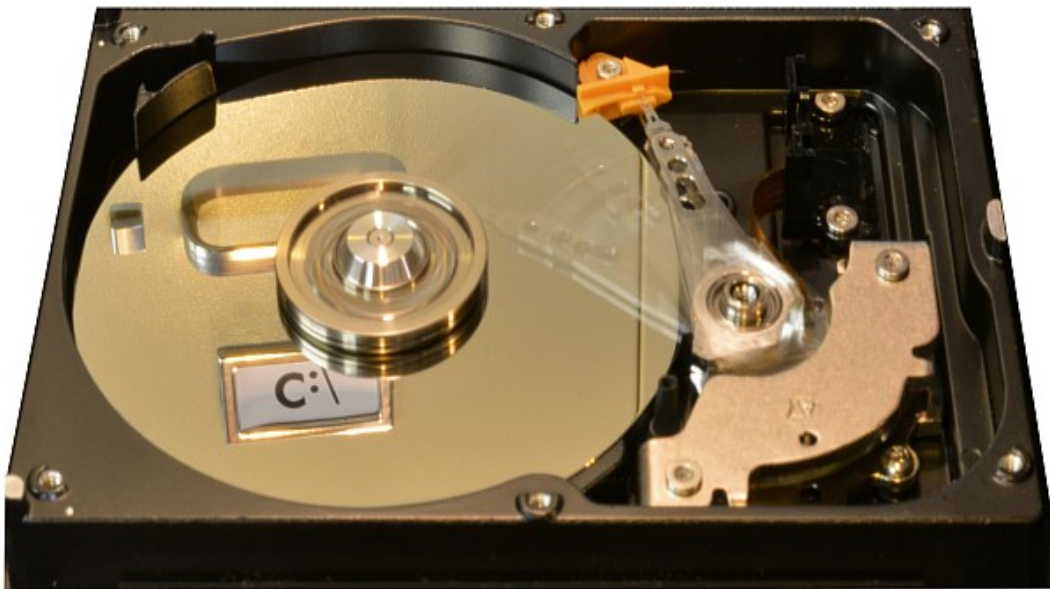
The next-bigger backup is a System Backup, and that's usually what I recommend for most users; it backs up everything on the C: drive, plus the hidden part of the drive that makes it possible to turn on the computer, also known as booting up. A system backup is good enough to restore all your documents and software and

Windows, if the drive goes bad. It's a snapshot of that drive as of the day you ran the backup. If there's another drive partition, usually D:, it does NOT back that up. It's also generally not good enough to back up a computer in case it is totally fried (dead, or Beyond Reasonable Repair), or just plain lost or stolen, because if you give me a system backup and an order for a new computer, I can't restore that system backup onto some other computer, in most cases.

What won't I have? Well, usually, the questions I ask will run something like this:

- What programs were installed? Especially email: What do you use for email?
- For the non-free programs, do you have the installer file, the CD/DVD, or the download link?
- For each of those programs, do you have the license key?
- If there is a service contract or a subscription, what is the contact information, account identification, and tech support phone?
- For Microsoft Office, do you have the login for your Microsoft account? We will need that so that we can transfer the license in that Microsoft account.

Usually, I can look in a system backup and read the files to figure out some of the software that was installed. That's not totally reliable, as there are a lot of programs listed that Microsoft installed, or have names that identify the publisher but not the product, A list is ideal.



The answers I get to those questions are, well, difficult. "It's in my Outlook, let's search." Searching old emails while the computer is down or gone forever is generally not possible. Outlook or Thunderbird won't be available while I'm rebuilding your system.

What to Do?

First, understand the limitations of backups, and they're the same for cloud backup,

document backups, and system backups: You can grab a single file out of an online backup, easily. Or I can do that for you from a backup drive. I can't, mostly, grab a database. Outlook is a database; QuickBooks is a database, and so are nearly all other accounting programs. Most industry verticals, the programs that everybody in your field of work uses to manage your businesses, are specialty databases. Databases can be read by the software that created them. I can restore them after the software is installed. Not before.

So the rule is that all information that you might need while rebuilding your computer, or recovering from a flood, or doing anything that might require you to suddenly work from a different computer, say, maybe a lightning strike, should be in a document, not a database. A PDF file is ideal; PDFs are reliable, and mostly don't care about the version numbers of the software used to read them. PDF files can be encrypted, so use encryption where it is appropriate, but that's another password to keep track of. I can read them from computers that cannot be booted up, most of the time. Don't rely on reading software installation information from 'an attachment in my email.'

Installation Programs

When you download a program, Windows wants to put it in the Downloads folder. That works well for documents. It's a very bad location for software installers, because when I need those to rebuild a computer, they're hidden inside one of several user logins ("profiles"), and it takes longer to find the technical bits stashed among your hundreds of business files. Make a habit of using a dedicated folder for all install programs, usually c:\Drivers, which is where I look for configuration notes. Sometimes I'll look at those and run them to replace your software, and sometimes they're just a checklist of what to find the newest version of, and then install that. But if you use one folder for computer notes, and don't mix them with your documents, you will save time and money later on.

Create PDFs of these files:

Software installation license keys, and order numbers or tech support information to go with them, especially if you're paying the publisher for support. Include account logins for the products that require them (Microsoft Office). Store these on the computer, in that c:\Drivers folder. Don't make it cryptic; I might have to find it by searching by file name from an MS-DOS prompt. Yes, that 1980's technology is still around.

Email

information.

Cloud backup login and encryption key: If you lose the encryption key for an online backup, you lose the backed-up-data. Proper cloud backups are encrypted during transit, and encrypted while in storage. (There are some exceptions; know if this applies to your backups.)

Employee contact information, especially phone numbers and emails. For those of you in hurricane and flood zones, include contact information for where they would evacuate to, if they had to. Store these where you can get at them without your computer; Google Drive is ideal, if you have access to it from your phone (there's an app for that), or can go to another computer and login at drive.google.com.

Landlord contact information, and their real estate property managers, if they use an outside company. Include their night-time emergency number.

So everything you need in an emergency, computer or physical, has to be in a place where you can read it without your computer, and without searching the missing/fried/wet computer for a login. Plan ahead. If this year has taught us nothing else, it's that everything that can happen, eventually, wait for it, happen. With [black swans](#) and unanticipated complications.

A very small group of offices that I work with keep a 3-ring binder of tech notes. How to log into stuff. Software license keys. Passwords. And when I ask a question, they just reach for the book. It works. I'd like to see that backed up, maybe scanned to Google Drive, or photocopied and taken home, but it works. Other offices keep license keys and hardware manuals and login notes in a dedicated file cabinet drawer; that's not as safe, but it's still useful, if it isn't floating away.



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