Connected® Backup for Mac Agent Help

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Iron Mountain Support Information

800.675.5971
U.S. +1 508 808 7629
E.U. +49 6102 8828855
corporatesupport@ironmountain.com

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Iron Mountain Incorporated
745 Atlantic Avenue
Boston, MA 02111
1-800-899-IRON

www.ironmountain.com

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ABOUT THE AGENT

The following topics describe the functions of the Agent:

- *Agent overview*
- *Retrieve and restore features*
- *Account recovery*
- *Account Management Website*
- *Terminology*

Agent overview

The Agent is the application on your computer that manages the backup and retrieval of your files. To back up your files, the Agent uses the Internet or a local intranet to connect to the Data Center. The Data Center stores your backups until you must retrieve one or more of them. At that time, the Agent can connect with the Data Center and download the appropriate files.

Under most circumstances, you do not need to monitor the Agent after you or an administrator install and register it. If you have an open network connection and your computer is powered on, the Agent can perform backups automatically, even at times when you are not working on your computer (for example, during the middle of the night).

Note

Remember that the Agent provides data protection and not long-term archival storage. Files that you delete from your computer are marked for deletion from the Data Center server where your backed-up files are stored. The backed-up copies of your locally deleted files are kept on the server for a limited time period, and are unavailable for retrieval after that time period. Your system administrator sets the retention period for these deleted files.

Agent configuration

An Agent configuration consists of the following components:

- The version and language information for the Agent
- Settings that determine how the Agent behaves on your computer and which Agent permissions you have.
- Settings that determine whether a link to the Account Management Website appears in your Agent application window and which permissions you will have in that Website.
- A rule set that determines how the Agent selects files for backup.

Your system administrator creates the Agent configuration and modifies it as needed. If you have permission, you can edit some Agent configuration information—such as the backup schedule—from the Agent window.

File security

When the Agent and Data Center transmit files to each other, encryption keys keep the data secure. The Agent encrypts your files before it backs them up. The files remain encrypted while they are stored at the Data Center. When you retrieve backed–up files, the Agent receives the files in their encrypted format. The Agent then decrypts the files after they are on your computer.

Retrieve and restore features

The Agent provides the following retrieve and restore features:

- Basic file retrieval.

  If you lose one or more files on your computer, but the rest of your computer functions, you can retrieve the missing files from backed up copies at the Data Center.

- File retrieval using MyRoam.®

  If you need to retrieve files that you previously backed up, and the computer you are using does not have an Agent installed, you can log on to *Account Management Website* and use the MyRoam application to retrieve files. For instructions, see the MyRoam Help.

- Agent account recovery.

  If your computer crashes or becomes corrupt, you have to reinstall your Agent and retrieve lost files. If you have to reinstall your Agent, do not create a new account. Instead, log on to the Account Management Website and use the Reinstall Agent feature.

Note

Remember that the Agent provides data protection and not long-term archival storage. Files that you delete from your computer are marked for deletion from the Data Center server where your backed-up files are stored. The backed-up copies of your files remain on the server for a limited time period, and are unavailable for retrieval after that time period. Your system administrator sets the retention period for deleted files.

Account recovery

If you experience a system crash or replace your computer hard drive, you might have to reinstall the Agent software and direct it to use your existing Agent account. Otherwise, you cannot access the files that you previously backed up. Use the *Account Management Website* to reinstall an Agent.

After you reinstall the Agent and recover your account, you can retrieve missing files.

Note

Before you use the reinstalled Agent to back up files, make sure that you retrieve all necessary files. The reinstalled Agent can back up only the files that are on your computer.

Account Management Website

The Account Management Website is a Web-based application that lets you manage your account.

You can gain access to the Account Management Website in the following ways:

- In the Agent window, choose **Tools > Manage Account Online**.
- From the Agent Status icon on the Dock, choose **Manage Account Online**.
- In a Web browser, enter the Account Management Website URL.

The Account Management Website can include all or some of the following features:

- Account registration and installation
- Account recovery
- Account summary and history
- MyRoam® access
- Account profile editing
- Access to your other accounts
- Support information

The Account Management Website includes the following changes:

- The Order Media option is not available.
- The View menu includes simple and advanced views.

For more information, see the Account Management Website Help.

Terminology

Agent

The Agent is the software application installed on your computer that manages the backup and retrieval of your files. The Agent uses the Internet or local intranet to connect to a facility called the Data Center to back up your files. The Data Center stores your backups until you need to retrieve one, many, or all of them. At that time, the Agent connects with the Data Center and downloads the files that you need.

backup set

The backup set consists of the files on your computer that the Agent backs up. Your system administrator determines which files are included in the backup set and whether you are permitted to change your backup set. The Backup Set shows your backup set.

Data Center

The Data Center is the set of servers that store your backed-up files. The Agent connects to the Data Center to back up or retrieve files.

exclusions

A rule category that the Agent uses to identify files and folders to omit from the backup set.

file selection icons

The following icons indicate whether a folder or file is selected for backup. These icons appear in the Backup Set and Retrieve s. If a checkbox is unavailable, the checkbox is locked and you cannot change its selection status.

Icon	Description
	All files and subfolders in a folder are selected, or a file is selected.
	Some of the subfolders and files in a folder are selected. Expand the folder and its subfolders to view which files are selected.
	All files and subfolders in a folder are not selected, or a file is not selected.
	Files are selected for backup because of a locked rule. You cannot edit or override locked rules.

locked rules

A locked rule determines which files the Agent selects for backup. You cannot edit or override locked rules.

rule set

A rule set is a collection of rules that the Agent uses to select files for backup. Each Agent has a single rule set. A rule set consists of volume exclusions, locked rules, and unlocked rules. If you have permission to edit your backup set, you can add user-created rules to the rule set. Your system administrator creates the rule set, changes it, and determines whether you can add user-created rules.

unlocked rules

An unlocked rule determines which files the Agent selects for backup. You cannot edit an unlocked rule. However, you can override an unlocked rule if you have permission to edit your backup set.

user-created files

A rule category for user-created data files, such as spreadsheets and documents. The Agent uses these rules to identify data files to select for backup.

user-created rules

A user-created rule determines which files the Agent selects for backup. You can add user-created rules when you select files in the Backup Set, or you can add a user-created rule from the Advanced Rules window.

User-created rules are preserved if a system administrator makes changes to the rule set for your Agent. However, because the Agent applies user-created rules after volume exclusions and locked rules, your backup set might change if a system administrator changes the rule set for your Agent.

volume exclusions

A volume exclusion is a volume that the Agent excludes from backup. If you exclude a volume from backup, the volume and its files do not appear in the Backup Set, and you cannot select these files for backup. Automatic volume exclusions include removable drives, network volumes, and case-sensitive volumes. Also, you can create volume exclusions by deselecting the checkbox next to a volume that is listed in the Advanced Rules window.

wildcard characters

Characters you can use to find files for retrieval and to create rule definitions.

*****	Use this character to match any number of characters. For example, entering `*.doc` finds any file that has a file extension of `.doc`. Entering `*2006*` finds any file whose name includes the text *2006*.
?	Use this character to match a single character. For example, entering `ab?.doc` finds `abc.doc` and `aby.doc`.

Getting Started

The following topics provide useful information for new users:

- *Using the Agent for the first time*
- *Navigating in the Agent*
- *Using the Agent Dock icon*
- *Selecting and deselecting folders and files*
- *Summary pane information*
- *Important account information*
- *Performing your first backup*

Using the Agent for the first time

The Agent includes an application window that you can use to perform the following tasks:

- Start a backup.
- Retrieve files.
- View information about the last backup.
- View and change the backup set.
- View and change the backup schedule.
- View messages sent to the Agent.
- View a history of Agent events.

About your first backup

Perform your first backup as soon as possible. During the first backup, the Agent backs up all files in your backup set to a *Data Center*. The first backup can take several hours to complete, depending on the number of files in your backup set and the connection speed on the network. Subsequent backups are smaller and faster because the Agent backs up only new files and changes to previously backed–up files.

Backup methods

Your Agent can back up files automatically according to a pre-set schedule, or it can require you to initiate backups manually. For your first backup, you might want to start the backup manually, rather than wait for a scheduled automatic backup.

Performing your first backup

To start the first backup, click **Back Up Now** from either the Summary pane or Backup Set pane. For more information about how to perform your first backup, see *Performing your first backup*. For information about how to verify the status of your first backup, see *Monitoring backup progress*.

If your Agent is configured to display pop-up messages, after the backup completes, the backup outcome appears in a pop-up window. To see more detailed information about the backup, click **View Details**. To close the pop-up window, click **Close**.

If the backup outcome does not appear in a pop-up window, you can view the backup outcome in the Last Backup section of the Summary pane and the History pane.

File security

The Agent encrypts files so that they are protected during transmission between the Agent and the Data Center. The files remain encrypted while they are stored at the Data Center. When the Agent retrieves backed–up files, it receives the files in their encrypted format. The Agent then decrypts the files after they are it retrieves them to your computer.

Performing your first backup

Changing your backup schedule

Backing up files manually

Navigating in the Agent

The following table tells you how to navigate the Agent to perform common tasks:

Task	Navigation
View a summary of the last backup, the backup schedule, and the most recent message sent to the Agent.	Click the **Summary** tab.
View detailed statistics for the most recent backup.	In the Last Backup section of the Summary pane, click **View Details**.
Change your backup schedule. Your administrator determines whether you can perform this task.	Perform one of the following tasks: ▪ In the Backup Schedule section of the Summary pane, click the Backup Schedule link. ▪ Choose **Tools > Backup Schedule**.
View the most recent messages sent to the Agent.	In the Messages section of the Summary pane, click **Show all messages**.
View files that the Agent backs up, and edit the backup set. Your administrator determines whether you can perform this task.	Click the **Backup Set** tab.
Retrieve files that the Agent previously backed up.	Click the **Retrieve** tab.
View a history of Agent events.	Click the **History** tab.
Edit your Agent profile	Click **Tools > Edit Profile**.
Start a backup manually.	Perform one of the following tasks: ▪ Choose **File > Back Up Now**. ▪ In the Summary pane, click **Back Up Now**. ▪ In the Backup Set pane, click **Back Up Now**. ▪ From the Dock menu, choose **Backup Now**.
Cancel a backup that is in progress.	Perform one of the following tasks: ▪ In the Agent window, click **Cancel**. ▪ From the Dock menu, choose **Cancel Backup**.
Toggle between Simple and Advanced view in the Backup Set and Retrieve tabs.	Perform one of the following tasks: ▪ Choose **View > Advanced**. ▪ Choose **View > Simple**.

Task	Navigation
Edit the Agent rules. Your administrator determines whether you can perform this task.	Choose **Tools > Advanced Rules**.
Change the backup mode and FileVault settings.	Choose **Preferences > Backup**. Choose **Preferences > FileVault**.
Use the Account Management Website to view and manage the Agent account. Your administrator determines whether the Account Management Website is enabled.	Choose **Tools > Manage Account Online**.
View the Agent Help.	Complete one of the following tasks: ▪ To view the entire help system, choose **Help > Agent Help**. ▪ To view the help topic for the open or window, click the Help icon.
View the software version and your account number.	Complete one of the following tasks: ▪ In the Agent application menu, choose **About**. ▪ From the Dock menu, choose **About**.
Close the Agent window.	Complete one of the following tasks: ▪ From the Agent application menu, choose **Quit**. ▪ From the Dock menu, choose **Quit**.

Using the Agent Dock icon

The Agent icon always appears on the Dock unless you remove it.

Use the Agent icon to open the Agent window and view the status of the Agent during backup and retrieval, and to open the Agent Dock menu.

Opening the Agent window

To open the Agent window, click the Agent Dock icon.

Viewing the Agent Dock icon

The appearance of the Agent Dock icon indicates whether a backup or retrieval is in progress, or the outcome of the last backup. The following tables describes each variation of the Agent Dock icon:

Agent Status Icon Appearance	Indicates
	No backup has been performed since this Agent was installed, and no backup or file retrieval is in progress.
	A backup is in progress.
	A file retrieval is in progress.

Using the Agent Dock menu

When the Agent is open, you can gain access to the Dock menu options from the Agent Dock icon. To open the Dock menu, right-click the Agent Dock icon.

The following table describes the Dock menu options:

Menu item	Task
Back Up Now	Start a manual backup.
Cancel Backup	Cancel a backup.
About	View Agent version information.
Manage Account Online	Manage your account using the Account Management Website, if it is enabled for your account.

Monitoring backup progress

Backing up files manually

Selecting and deselecting folders and files

If you have permission to edit your backup set, you can click the checkboxes that contain file selection icons to select and deselect folders and files.

To select folders and files in either the Backup Set or Retrieve panes, click the checkbox next to the item.

To deselect folders and files in either the Backup Set or Retrieve panes, deselect the checkbox next to the item.

Note

In the Backup Set pane, you cannot select or deselect locked folders or files. Your system administrator has determined the status of the locked folders or files, and you cannot use the Agent window to change that designation.

Toggling Simple and Advanced view

The Backup Set and Retrieve tabs show files in either Simple view or Advanced view.

Simple view shows files and folders as they appear in Finder.

Advanced view shows files and folders that appear in Finder, and hidden files and folders.

To toggle between Simple and Advanced view, complete the following steps:

1. Open the Backup Set or Retrieve pane.
2. Perform one of the following tasks:
   - Choose **View > Advanced**.
   - Choose **View > Simple**.

The view selection is a global setting that applies when you switch from to, after you close and reopen the Agent, and after you restart your computer.

Summary pane information

When you open the Agent application, the Summary pane opens. The following table describes the elements in the Summary pane:

Element	Description
Last Backup	The outcome of the last backup, the end time and date of the backup, and a link to view the details history for the backup.
Backup Schedule	The automatic backup schedule for your Agent. If your Agent is not configured for automatic backups, you see **None scheduled**. If you have permission to change your backup schedule, your backup schedule information includes a link to the **Backup Schedule** window.
Messages	A message generated automatically as the result of system activity or sent from a system administrator. Your Agent receives new messages when it connects to the Data Center. The Summary pane displays only one message. This message is the most important or most recently generated message. The message also appears as the first message in the messages window. The message window contains all other messages sent to your Agent. To open the message window, click the View all Messages link. The messages are listed chronologically and in order of importance.
Action buttons	**Back Up Now**. Click **Back Up Now** to start a manual backup.

Important account information

Record your account number and store it in a secure place away from your computer. You need this information to reinstall the Agent and retrieve files.

You can view your account information at the bottom of the About window.

Password protection

Your system administrator can configure your Agent so that you must enter an account password before you can retrieve files.

If you are a technician, when the Enter Password pop-up window opens before a retrieval, click **Advanced**, and then enter your technician ID and password.

Performing your first backup

After the Agent is installed on your computer, perform your first backup as soon as possible. During the first backup, the Agent backs up all files in your backup set to a Data Center. The first backup can take several hours to complete. The number of files in your backup set and the connection speed on the network determine how long the first backup takes to complete. Subsequent backups are smaller because the Agent backs up only new files and changes to previously backed–up files.

Your Agent can back up files according to a pre-set schedule, or it can require that you initiate backups manually. For your first backup, you might want to start the backup manually rather than wait for a scheduled automatic backup.

To manually start the first backup, complete the following steps:

1. To view the files selected for backup, click the **Backup Set** tab.

   If your Agent lets you edit your backup set, you can change the files that are selected for backup. For more information, see *Viewing and changing your backup set*.

2. To start the backup, perform one of the following tasks:

   - Click **Back Up Now** in the Backup Set pane.
   - Click **Back Up Now** in the Summary pane.
   - Choose **File > Back Up Now**.

   The Backing Up dialog box opens and describes the status of the backup.

Backing up Files

The primary task of the Agent is to back up the files that are on your computer. During a backup, the Agent scans the hard disk of your computer to locate files that it needs to back up. It then encrypts, compresses, and transfers these files to the Data Center. You can retrieve these files from the Data Center if the files become corrupted or lost on your computer.

An Agent can back up files of any size. However, if an Agent has a maximum backup set size specified, the backup is limited to that size. The Agent's rule set defines the types of files to back up. The Agent might not back up all of the folders and files on your computer. Usually, files excluded from a backup are files that you do not need to retrieve or save.

Automatic and manual backups

The Agent can back up files according to a pre-set backup schedule. You can also back up files at any time without waiting for the Agent to perform the scheduled backup.

Note

An automatically scheduled backup cannot occur if the computer is in standby or hibernation mode.

Backup topics

For more information about backing up files, see the following topics:

- *The backup set*
- *Changing your backup schedule*
- *Changing your backup options*
- *Managing FileVault passwords*
- *Backing up files manually*
- *Monitoring backup progress*
- *Delaying an automatic backup*
- *Cancelling an automatic backup*

The backup set

The backup set consists of the files that the Agent backs up. The Agent backs up files based on your schedule or when you manually initiate a backup. During the first backup, the Agent backs up all files in the backup set and transmits them to the Data Center. During subsequent backups, the Agent backs up only new or changed files in the backup set.

Your system administrator determines which files to include in the backup set and whether you have permission to change your backup set.

To view or change the backup set, open the **Backup Set**. For more information, see *Viewing and changing your backup set*. To undo changes you made in the **Backup Set**, see *Undoing changes to the backup set*.

Another way to change your backup set is to use the **Advanced Rules** window to add user-created rules. For more information, see *Managing user-created rules*.

Backup set considerations

When you work with a backup set, keep the following information in mind:

- If a drive has a name that contains a comma (,) you cannot exclude the drive from the backup set. Although you can use the Agent interface to deselect the drive from the backup set list, the Agent scans the drive for backup regardless of the selection and regardless of whether the files on the drive match rules.
- If you remove a file from a backup set, the Data Center deletes the backed-up versions of that file from the Data Center server. The Data Center uses its file expiration rules to determine how long to keep backups of files that you exclude from the backup set. To ensure that the Data Center always has a recent backup of your files, keep the files selected in the backup set.
- If you delete a file in the backup set from your computer, the Agent removes the file from the backup set. The Data Center eventually deletes the file from the Data Center server. Your system administrator sets the retention period for deleted files.
- If you add a new file to your computer, your Agent rule set determines whether that file is automatically added to your backup set.
- The first time the Agent backs up files, it backs up all files that are selected for the backup set. Subsequent backups are incremental. The Agent backs up only new files and changes to previously backed-up files.
- If your Agent has a maximum backup set size, your Agent receives a warning message when your backup set approaches or exceeds its maximum size. For more information, see *Backup set maximum size*.

CAUTION

Do not include the Time Machine folder in your backup set. If you do, the backup process uses all available memory.

Viewing and changing your backup set

Use the Backup Set to view which files are in your backup set, and to change your backup set if you have permission to do so. The default backup set selections are based on the rule set created by your system administrator.

The Backup Set shows all folders and files on your computer except for removable thumb drives, network volumes, and case-sensitive volumes. A checkbox next to a folder or file indicates whether the folder or file is selected for the backup set.

Note

You cannot change the selection status of a checkbox if either your Agent does not let you edit your backup set, or if the folder or file is locked. A folder or file is locked if a locked administrative rule specifies that the folder or file must or must not be backed up.

To view or change your backup set, complete the following steps:

1. Click the **Backup Set** tab.

   If this is the first time that you have opened this tab since you started the Agent, the Agent scans the computer to compile your backup set. While the Agent scans, you receive a `Scanning...` message.

   When the scan is complete, the Agent displays folders in the left side of the Backup Set pane.

2. To view the contents of a folder, perform one of the following tasks:
   - In the left pane, click the folder name. The contents of the folder appear in the right pane.
   - In the right pane, double-click the folder. The contents of the folder appear in the right pane.
   - In the left pane, expand the folder. The subfolders appear beneath the folder.

3. To select all of the files and subfolders for backup, select the empty checkbox next to the folder name.

   A locked subfolder or file might prevent you from selecting all subfolders or files in a folder. If the folder contains some locked files, a message window opens to inform you that your change applies only to the unlocked files in the folder. To close the message, click **Close**.

4. To select a specific file for backup, use the left pane to select the folder that contains the file. When the file appears in the right pane, select the empty checkbox next to the file.

5. To remove all the files and subfolders in a folder from the backup set, deselect the checkbox next to the folder.

   A locked subfolder or file might prevent you from deselecting all subfolders or files in a folder. If the folder contains some locked files, a message window opens to inform you that your change applies only to the unlocked files in the folder. To close the message, click **Close**.

6. To remove a specific file from the backup set, use the left pane to select the folder that contains the file. When the file appears in the right pane, deselect the checkbox next to the file.

Note

If you deselect a file that the Agent previously backed up, you remove it from the backup set. Over time, the Data Center deletes excluded files based on file expiration rules. After the Data Center deletes a file, you cannot retrieve it at a later time.

Effects of changing your backup set

If you change the files selected in the Backup Set pane, when the Agent performs the next backup, it backs up only the selected files. Each file selection you change in the Backup Set pane results in the creation of a new user-created rule with a source of **Backup Set selection**. (You can view the user-created rules in the Advanced Rules window.) These rules ensure that your changes are saved for the next backup. For information about how the Agent uses rules to select its backup set, see *How the Agent uses rules during a backup*.

If a system administrator changes the rule set for your Agent, your user-created rules are preserved, but new volume exclusions or locked rules might override them.

Toggling Simple and Advanced view

Undoing changes to the backup set

To undo all of your changes to the backup set since you opened the Agent window, in the Backup Set pane, click **Undo All Changes**.

The Undo feature removes user-created rules that were added since the Agent window was opened, and restores the backup set to its previous state.

Backup set maximum size

If your Agent has a maximum backup set size, that value appears in the status bar of the Backup Set pane. If a backup reaches its maximum size, the backup process stops and a message appears in a pop-up window to inform you that all of the files were not backed up. Your Agent might also be configured to receive a message in a pop-up window if the backup set approaches its maximum size. Messages about the limit for backup set size also appear in the Messages section of the Summary pane and in the View History Details pane.

For more information about these error messages, see *Backup set size limit messages* and *Viewing messages in pop-up windows*.

Changing your backup schedule

The backup schedule determines whether your Agent is configured for automatic backup, and if so, the days and time period when the automatic backup occurs. You can view your backup schedule in the Backup Schedule section of the Summary pane.

You can use the Backup Schedule window to change your backup schedule if your Agent configuration lets you do so.

To change your backup schedule, complete the following steps:

1. Complete one of the following tasks:
   - Choose **Tools > Backup Schedule**.
   - In the Backup Schedule section of the Summary pane, click the schedule link.

   The Backup Schedule dialog box opens.
2. Select your backup schedule.
3. Click **OK**.

Changing your backup options

The backup options determine how the Agent behaves when an automatic backup does not start.

You can change your backup options only if your Agent configuration lets you do so.

To change your backup preferences, complete the following steps:

1. From the application menu, choose **Preferences**.

   The Preferences dialog box opens.
2. Click the **Backup Set** tab.
3. Select your backup options.

   For more information, see *Backup Options pane*.
4. Click **OK**.

Managing FileVault passwords

The Agent can back up your FileVault-protected files only under the following circumstances:

- You are logged on to the Agent computer.
- You are not logged on to the Agent computer, but previously you entered your Mac OS® X account user name and password in the **FileVault** tab.

The Agent encrypts and securely stores your account password.

If you are not logged on to the Agent computer, and you did not enter your Mac OS® X user name and password in the **FileVault** tab, the Agent does not back up your FileVault-protected files.

If you change your Mac system password, you invalidate the FileVault password in the Agent Preferences. If a backup runs while you are logged out, and your FileVault password is not valid, the Agent cannot back up your FileVault-protected files. To avoid this situation, update your FileVault password immediately after you change your Mac system password.

To enable the FileVault option, complete the following steps:

1. From the application menu, choose **Preferences**.

   The Preferences dialog box opens.
2. Click the **FileVault** tab.
3. To enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out, select **Enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out**.
4. From the Account User Name pop-up menu, choose the user name that is associated with the account that you want to protect.

   The Agent populates the Account User Name pop-up menu with user names only for accounts that have FileVault-protected home folders on the computer.
5. In the **Password** field, type your Mac OS X user account password.
6. Click **OK**.

To edit a stored account username and password, complete the following steps:

1. From the application menu, choose **Preferences**.

   The Preferences dialog box opens.
2. Click the **FileVault** tab.
3. Modify the selected user account name or password.
4. Click **OK**.

To disable the FileVault option, complete the following step:

Deselect **Enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out**, and click **OK**.

Backing up files manually

You can start a backup manually at any time, even if your Agent backs up files automatically. A manual backup is useful if you must be sure that important information is backed up as soon as possible. For example, if you intend to upgrade your system, you might want to manually back up the latest files before you start the upgrade so that you can retrieve those files if a problem occurs during the upgrade.

To back up files manually, complete one of the following steps:

- On either the Summary or Backup Set pane, click **Back Up Now**.
- Choose **File > Back Up Now**.
- Right-click the Agent Dock icon, and then choose **Back Up Now** or **Back Up and Exit**.

  The Backing Up dialog box opens and describes the status of the backup.

Monitoring backup progress

Viewing and changing your backup set

Monitoring backup progress

If the Agent window is open and a backup is in progress, or if you open the Agent window while an automatic backup is in progress, the Agent shows a backup progress bar and status information on top of the Agent window. Some features in the Agent window remain disabled until the backup completes. Other features remain enabled while the Agent scans files in the backup set for changed information. Phase 2 in the Phase Description table in this topic lists the features that remain enabled.

Notes

During a backup, the Agent Status icon has this appearance:  .

To monitor the progress of a backup, watch the backup progress bar and messages.

The progress bar indicates the percentage of completion. The messages tell you which phase of the backup is in progress. The following table describes the phases of the backup process:

Phase	Description
1	**Synchronizing account information** In this phase, the Agent downloads changes to the Agent Version, Agent Rule Set, Agent Settings, and Website Settings. The Agent also receives messages and uploads logs. The Agent applies all changes to this backup with the following exceptions: ▪ The Agent applies backup schedule changes to the next backup. ▪ The Agent applies Website Settings changes the next time it either synchronizes with the Data Center or restarts.
2	**Looking for changes** During this phase, the Agent scans the files in the backup set for changes that occurred since the last backup. The progress bar remains at 0% and the number of files scanned appears beneath the progress bar. During this phase, the following features remain enabled: ▪ In the Agent window, **Cancel** ▪ In the Dock menu, **Cancel backup** ▪ **Help** ▪ On the Dock menu and on the Tools menu, **Manage account online** ▪ **About the Agent**

Phase	Description
3	**Backing up files** In this phase, the Agent starts to send the files to the Data Center. The progress bar indicates the percentage of bytes processed. The messages below the progress bar indicate the status of the backup process and the name of the file that the Agent is backing up. The status message indicates the number of files that the Agent has backed up, and the number of files that the Agent has yet to back up. The file name message includes all or part of the path for the file that the Agent is backing up.
4	**Synchronizing file structure** In this phase, the Agent sends information about deleted files to the Data Center.
5	**Synchronizing account information** In this phase, the Agent performs the following tasks: ▪ Downloads additional changes to the Agent Version, Agent Rule Set, Agent Settings, and Website Settings. ▪ Installs an upgrade, if one is available. ▪ Finishes the synchronization of local file information with the Data Center, receives messages, and uploads logs.

If the Agent loses its connection to the Data Center, it tries to reestablish its connection and displays the following message, below the progress bar:

```
Trying to reestablish connection
```

The completed percentage does not change until the Agent reestablishes the connection and the backup continues.

Backup outcome

When a backup completes, your Agent receives a backup outcome message from the Data Center. Backup outcome messages appear in the Last Backup section of the Summary pane. However, your system administrator also can select to show backup outcomes in a pop-up window.

The **Last Backup** section includes the following information:

- The backup outcome
- The end time and date of the last backup
- A **View Details** link that opens the View History Details window.

The Backup Outcome pop-up window includes the following buttons:

- **View Details** — Opens the View History Details window. For more information, see *View History Details window - Backup* window.
- **Close** — Closes the pop-up window.

If applicable, after backup, a message opens in a pop-up window to inform you that have reached or are near your backup limit. For information about these message types, see *Backup set maximum size*.

You also can view backup outcomes on the History pane.

Delaying an automatic backup

When the Agent window is open, an Automatic Backup pop-up window opens five minutes before an automatic backup starts. If the Agent window is closed, your system administrator determines whether that window appears.

You can use the Automatic Backup window to delay a backup instead of letting it start at the scheduled time. For example, if you use the Agent to change a backup set, retrieve files, or view Agent history, you might not want to run a backup at the same time.

To delay the start of an automatic backup, complete the following steps:

1. When the Automatic Backup window opens, click **Delay Backup**.

   The Delay Backup dialog box opens.

2. Specify a one of the following postponement time periods:

   - 5 minutes
   - 10 minutes (default)
   - 15 minutes
   - 30 minutes
   - 1 hour

3. Click **OK.**

   The Agent shows the next backup time based on the time period that you select. If you delay the backup for more than five minutes, the Automatic Backup window opens again five minutes before the backup starts.

Note

If you do not select an Automatic Backup option within five minutes, the backup starts.

Cancelling an automatic backup

You can cancel a backup while it is in progress or shortly before it starts. Depending on when you cancel the backup, the Agent might be able to back up some of the files in the backup set.

When the Agent window is open, the Agent shows an Automatic Backup pop-up window for five minutes before an automatic backup starts. Your system administrator determines whether the pop-up window opens when the Agent window is closed.

To cancel a backup that is in progress, complete the following steps:

1. Perform one of the following tasks:
   - In the Agent window, click **Cancel**.
   - From the Dock menu, choose **Cancel Backup**.

   The Agent shows a cancel message while it stops the backup.
2. Check the Agent history for this event to determine whether the Agent backed up some files before you canceled the backup.

To cancel an automatic backup before it starts, complete the following steps:

1. In the Automatic Backup window, select **Cancel backup**.

   The Agent shows a cancel message while it stops the backup.
2. Click **OK**.

Agent History overview

Viewing History

RETRIEVING FILES

If you lose files or if specific files become corrupt, you can retrieve backed-up copies of the files from the Data Center. The Retrieve option lets you retrieve one or more specific files.

Notes

During a retrieval, the Agent Status icon has this appearance: .

Retrieve overview

Retrieve overview

When the Agent retrieves files, it downloads selected files from the Data Center in encrypted format and then decrypts them after they are on your computer. The Agent can retrieve files to their original locations on your computer or to other destination folders that you specify. By default, the Agent shows the most recent versions of files on the Data Center. You can retrieve older versions, if necessary.

Retrieve restores files that do not currently exist or are different from the files currently in the destination folder. If an existing file is identical to a file that you select for retrieval, Retrieve does not restore the file. Identical files have the same file name, file size, and modification date.

Note

Remember that the Agent provides data protection and not long-term archival storage. Files that you delete from your computer are marked for deletion from the Data Center server where your backed-up files are stored. The backed-up copies of your locally deleted remain on the server for a limited time period, and are unavailable for retrieval after that time period. Your system administrator sets the retention period for these deleted files.

Password-protected retrieval

If the Retrieve option is password protected, the Agent behaves in the following ways:

- When you click the **Retrieve** tab, the Agent prompts you to enter your account password. Enter your password and click **OK**.
- When a system Administrator clicks the **Retrieve** tab of your Agent, the Agent prompts the Administrator to enter the account password or click **Advanced**. The system Administrator must enter a technician ID and password, and then click **OK**. The technician ID must have the **Access User's Data** permission turned on.

If you enter three consecutive incorrect passwords, your account password becomes locked and you cannot gain access to the **Retrieve** tab or the Account Management Website for 20 minutes. A system administrator can reset a locked account password.

Retrieving files from the Data Center

By default, the **Retrieve** tab shows the most recent versions of each file or folder that are backed up on the Data Center. To see other versions of backed-up files, select a different value in the **Show Versions** list.

To retrieve files, complete the following steps:

1. Click the **Retrieve** tab.

Note

If the retrieve option is password protected, the Agent prompts you to enter your password before the Retrieve pane opens. Alternatively, a system administrator who retrieves files on your behalf can click **Advanced** in the Enter Password window, and then enter a technician ID and password. The technician ID must have the Access User's Data permission turned on. If it does not, the system administrator cannot use Retrieve.

2. Select each file and folder that you want to retrieve.
3. Click **Retrieve**.

   The Retrieve dialog box opens.
4. Specify Retrieve options.

   When the retrieval completes, the Retrieve outcome opens in a pop-up window.

   The Retrieve outcome can include the following buttons:

   - **Open Folder —** If you retrieved all of the files to a single folder, this button opens the folder to which the files were retrieved.
   - **View Details —** Lets you view details for the retrieval.
   - **Close —** Closes the retrieval outcome window.

You also can view the retrieval outcomes on the History pane.

Selecting files for retrieval

Use the Retrieve pane to select the files that you want to retrieve.

By default, the Retrieve pane shows the most recent version of files that are backed up to the Data Center. To select a file for retrieval, check the box next to the name of the file.

You also can select other versions of files for retrieval.

File retrieval involves the following steps:

1. Select which version of backed-up files you want to view.
2. Locate the files that you want to retrieve.
3. Select the files that you want to retrieve.

To select a version of backed-up files, complete the following step:

In the Show Versions drop-down list, select one of the following items:

- **Most Recent** — This is the default value. When you select this option, the Retrieve pane shows only the most recent version of each file and folder that is backed up to the Data Center for this Agent account.
- **As of Backup Date** — When you select this option, the **Version as of Backup Date** window opens. Select a backup date, and then click **OK**. The Retrieve pane shows only the versions of the files that were backed up on the selected date.
- **All** — When you select this option, the Retrieve pane shows all versions of files backed up on the Data Center for this Agent account. The system administrator determines the number of versions that the Data Center saves.

To locate the file that you want to retrieve, complete the following step:

Perform one of the following tasks:

- In the Backed-up Files section in the left pane, use the tree to expand folders and subfolders. Click a folder name to view its subfolders and files in the right pane.
- In the right side of the Retrieve pane, double-click a folder name to view its subfolders and files.
- Use Find to locate a specific file.

To select the files that you want to retrieve, complete the following steps:

1. To select the files that you want to retrieve, perform one of the following tasks:
   - To select all files in a folder, in the Backed-up Files section in the left pane, or in the Name column in the right pane, select the checkbox next to the folder.
   - To select specific files, in the Backed-up Files section in the left pane, expand a folder, and then, in the right pane, select the checkbox next to each file that you want to retrieve.
   - To deselect a file or folder, deselect the checkbox next to the file or folder name.
2. After you select all of the files and folders that you want to retrieve, click **Retrieve**.

   The Agent prompts you to specify additional Retrieve options. The Retrieve options identify a destination for the retrieved files and how the Agent resolves file name conflicts.

Specifying Retrieve options

Finding files for retrieval

Toggling Simple and Advanced view

Specifying Retrieve options

After you select the files that you want to retrieve, the Retrieve window opens. Use the Retrieve window to specify where to put the retrieved files, and the how to resolve file name conflicts.

To specify retrieval options, complete the following steps:

1. Select one of the following destinations:
   - **New Location**— Select this option to choose a location for the retrieved files. If you select a location that is different from the original location, you avoid file name conflicts. The default location is your documents folder. To choose a different folder that already exists, or to create a new folder in which to store the files, click **Choose**.
   - **Original Location** — Select this option if you want to retrieve the files to their original locations and maintain the original folder structure. The original location is the location of the file at the time that the Agent backed it up. During the retrieval, the Agent creates missing folders, if necessary, to recreate the original path.
2. To specify how the Agent handles name conflicts during the retrieval, select one of the following options:
   - **Rename the files being retrieved** — When you select this option, the Agent renames the files that it retrieves from the Data Center if a file with the same exists in the retrieval destination, and the existing file contains data that is different from the retrieved file. The Agent adds the word “Restored” and a sequential number to the end of the file name in the destination folder (for example, Reports Restored 1.doc).
   - **Overwrite the files currently on my computer** — When you select this option, the Agent replaces files in the retrieval destination that have the same names as the files retrieved from the Data Center, and contain data that is different from the retrieved files.
3. Click **Retrieve**.

   The Retrieve dialog box opens and describes the status of the retrieval.

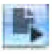
Finding files for retrieval

The Find feature lets you search for specific files for retrieval. The Find feature is helpful if you do not know the full name or path for a file.

You can use the Find feature at any time when you select files for retrieval. Using Find does not affect folder and file selections that you have already made in the Retrieve pane.

To use Find to retrieve files, complete the following steps:

1. On the left side of the Retrieve pane, in the **Backed-up Files** list, select the volume or folder in which you want to search for the file.

   The folder name appears in the **Find in** field to the right of the Find buttons.
2. In the **Find** field, enter a full or partial filename. You can use wildcard characters in the **Find** field.
3. Click the Find Next button  .

   In the right side of the Retrieve pane, the Agent highlights the first matching file.

   The tree in the right side of the Retrieve pane shows where the match is located.
4. To select a file or folder, click the checkbox next to the file name or folder name.
5. To search for additional files or folders that match the Find criteria, click the Find Next button again.

   In the right side of the Retrieve pane, the Agent shows the next matching file.
6. To return to a previous match, click the Find Previous button  .

   A pop-up message indicates when the Agent has found all of the matches.
7. To start a new search, repeat this procedure.

USING AGENT HISTORY

The Agent records event messages for the operations that it performs. You can view this information in the History pane.

See the following topics:

- *Agent History overview*
- *Viewing History*

Agent History overview

The History pane lists events that occurred during backup, retrieval, Agent installation, and account recovery or file list synchronization.

You can select one or more events listed in the History pane and view additional information about those events. You can also export event details to a TXT or XML file that you can send to a technical support representative if you need help with solving problems.

Note

After an account recovery, the Agent does not restore the History.

Types of events

The History pane lists events for the following operations:

- Backup
- Retrieve
- Agent install / Account recovery
- Agent software upgrade

Storage of Agent history

The Agent stores history information on the Agent computer for 90 days.

Viewing History

Exporting History

Agent error messages

Agent warning messages

Agent events

The following table lists the event messages that appear in the History pane:

Agent operation	Event message	Description
Agent install/Account recovery	Agent install / Account recovery	The Agent tried to recover an existing account.
Agent software upgrade	Agent software upgrade	The Agent upgraded to a newer version.
Backup	Back up <#> files	The Agent backed up the specified number of files.
	Back up	The Agent did not back up any files. Possible causes include the following reasons: ▪ You canceled the backup before the Agent transmitted files to the Data Center. ▪ An error prevented the Agent from transmitting files to the Data Center. ▪ None of the files in the backup set changed since the last backup. ▪ The backup is postponed because the bandwidth allocated for backups is currently used by other Agents.
Retrieve	Retrieve <#> files	The Agent retrieved the specified number of files.
	Retrieve	The Agent did not retrieve any files. Possible causes include the following reasons: ▪ You canceled the Retrieve before the Agent retrieved any files. ▪ An error prevented the Agent from retrieving files.

Agent error messages

Agent warning messages

Viewing History

Use the History pane in the Agent window to view events. By default, the History pane displays the most recent events first. To sort the list of events, click the column headings. The time stamp for events uses the local time and format of the computer.

To view Agent events, complete the following steps:

1. Select the **History** tab.

   The History pane displays a list of events that occurred during the past 90 days.

2. Select one or more events in the list and then, to show additional details about the events, click **View**.

   The Agent opens a View History Details window for each selected event.

Sorting the display

To sort the events in the History pane, click a column heading. The column heading shows an up arrow when it sorts the events in ascending order. The column heading shows a down arrow when it sorts the events in descending order.

Exporting History

Exporting History

You can export information for history events to a TXT or XML file. These files can help technical support representatives solve problems.

To export history details to a TXT or XML file, complete the following steps:

1. Click the **History** tab.
2. Select one or more events in the list and click **Export**.

   The Export dialog box opens.
3. Enter a name and location for the export file. The default filename has the following syntax:

   `Agent` *`Log_Account #`*`.xml`

   where *`Account #`* is the account number that is associated with your Agent.

   If you select multiple events in the History pane, the Agent exports all of the event details to a single file.
4. Click **Save**.

When you view details for a single event in the View History Details window, click **Export** from the History Details window to export information for the event.

Viewing History

AGENT ERROR MESSAGES

To view details about errors that occur during an Agent operation, select the event in the History pane, and then click **View**.

For descriptions of common error messages, see the following topics:

- *Installation and account recovery error messages*
- *Backup error messages*
- *Retrieve error messages*

Installation and account recovery error messages

The following table lists the most common errors that can occur during account installation or recovery.

Error message	Possible cause
`The Agent could not connect to the Data Center.`	The Agent cannot connect to the Data Center. Possible causes for this error include the following: ▪ Because all licenses in the Data Center license file have expired, the Data Center is unavailable to Agents. ▪ There is a network problem or a power outage. ▪ The computer is physically disconnected from the network. ▪ Because of incorrect proxy settings, the Agent cannot communicate with the Data Center.
`The Data Center PC or Mac licenses have expired.`	The Data Center is licensed for both PC and Server, and the PC and Mac licenses in the license file have expired, but the server licenses have not expired.
`The Data Center's Server licenses have expired.`	The PC with Server Option licenses have expired, but PC or Mac licenses are still available. You must have an available PC with Server Option license for registration to happen.
`No licenses for PC or Mac backup accounts are available.`	The Data Center Community does not have enough PC or Mac licenses.
`<parameter> is undefined.`	A required parameter is missing.
`<parameter> is invalid.`	The value of a required parameter is invalid.
`The USERID and PASSWORD are invalid.`	The USERID and PASSWORD values provided for a hands-free account recovery are invalid.
`ACCOUNTNUMBER is invalid.`	The ACCOUNTNUMBER value provided for a hands-free account recovery is invalid.
`Insufficient disk space available.`	The computer that is associated with the account does not have sufficient disk space to complete the account recovery.
`Hardware error.`	A hardware error occurred while the Agent was trying to recover an account.

Error message	Possible cause
`The Agent lost its connection to the Data Center.`	The Agent cannot re-establish a lost connection to the Data Center. The Agent can lose connection if any of the following situations occur during an account recovery:· ▪ Network problems or a power outage make the Data Center unreachable.· ▪ The computer becomes physically disconnected from the network.
`The Agent cannot communicate with its background service. Restart your computer or for more information, see the Help.`	There is a problem with the AgentService process, or an antivirus software setting, firewall setting, or network setting is blocking port 16386. Restart your computer to reset the AgentService process. Ensure that port 16386 is not blocked.
`Cannot register account because its Data Center Community has no licenses available.`	The community in which the Agent attempted to register does not have available licenses. Change the license allocation to let Agents register.
`Invalid password.`	The account password is invalid.
`The technician ID does not have appropriate permissions to register this account in the associated Data Center Community.`	The technician ID does not have the Modify Communities permission. A system administrator can use Support Center to adjust the permissions or use a different technician ID.
`Out of disk space.`	The computer for which you are attempting to register an account does not have sufficient disk space for the Agent.
`Disk error.`	A disk error occurred and the Agent could not complete the registration.

Backup error messages

The following table lists the most common errors that can occur during a backup:

Error message	Possible cause
`The Agent cannot back up <file name> in <path> because its size, <value>, is greater than the maximum of <maximum file size>.`	The file is too large. To address the problem, complete one of the following tasks, and then run the backup again: ▪ Exclude the file from backup. ▪ Reduce the size of the file attributes. ▪ Break the file into two separate files. ▪ If the file is a database, compress the database.
`The Agent cannot back up <file name> in <path> because the size of the metadata, <value> bytes, stored in the file attributes is greater than the maximum size of <value> bytes.`	The amount of metadata stored in the attributes of the file exceeds the maximum number of bytes allowed. To address the problem, complete one of the following tasks, and then run the backup again: ▪ Exclude the file from backup. ▪ Reduce the size of the file attributes. ▪ Break the file into two separate files. ▪ If the file is a database, compress the database.

`The Agent could not back up your files for the following reason:`
 	
`The Agent could not communicate with the Data Center. Restart your computer or for more information, see the Help.`
	There is a problem with the AgentService process, or an antivirus software setting, firewall setting, or network setting is blocking port 16386.
	
	Restart your computer to reset the AgentService process.
	
	Ensure that port 16386 is open.

`The Agent could not back up the home folder for <Mac OS X username> because it is protected by FileVault. To back up files in your FileVault-protected home folder when you are logged out, select the checkbox on the FileVault tab and enter your Mac OS X username and password. Enable the FileVault option in Agent Preferences. To do so, select open Preferences from the Connected Backup menu, and then click the FileVault tab.`	You are logged off during backup and your Mac OS® X account user name and password are not stored in the Agent Preferences. For more information, see *Managing FileVault passwords*.

Error message	Possible cause
`The Agent could not back up the contents in the home folder for <Mac OS X user name> because the Mac OS X account password is invalid. To ensure the Agent can back up the files in this home folder when you are logged out, reenter your Mac OS X account password. To do so, open Preferences and click the FileVault tab.`	You are logged off during backup and the Agent does not have the correct Mac OS X account password. The contents of the FileVault-protected home folder is part of the backup set because it was added to the backup set during a previous backup.
`The Agent could not connect to the Data Center.`	Possible causes for this error include the following reasons: ▪ Network problems or a power outage have made the Data Center unreachable.· ▪ The computer is physically disconnected from the network.· ▪ Incorrect proxy settings prevent communication between the Agent and the Data Center. ▪ All licenses in the Data Center license file have expired. If there are no licenses, the Data Center does not work, and the Agent is unable to find the Data Center.
`Backup failed because your account was canceled.`	The Agent cannot complete a backup because the Agent account was canceled. For more information, contact your system administrator or service provider.
`The Agent is unable to perform the backup because this account is in use by the computer <name>. Contact Support for further assistance.`	Possible causes for this error include the following reasons: ▪ You performed the most recent backup for your account from a different computer, you have never backed up your account from your current computer, and you clicked **No** when the `Move Backup Account?` pop-up message opened. ▪ You performed the most recent backup for your account from a different computer, and although you have previously backed up your account from your current computer, you did not perform an Account Recovery before this backup attempt.

Error message	Possible cause
`Backup failed because your account was put on hold.`	The Agent cannot complete a backup because the Agent account was put on hold. For more information contact your system administrator or service provider.
`The Data Center Server licenses have expired.`	The PC with Server Option licenses in the license file on the Data Center have expired, but the PC or Mac licenses have not expired.
`The Data Center PC or Mac licenses have expired.`	The PC or Mac licenses in the license file on the Data Center have expired, but the PC with Server Option licenses have not expired.
`Insufficient disk space available for processing backup.`	The Agent could not complete the backup because the computer does not have enough disk space to process the backup.
`Hardware error.`	A hardware error occurred on the client system during a backup. The Agent could not complete the backup.
`The Agent lost its connection to the Data Center.`	The Agent cannot re-establish a lost connection to the Data Center. The Agent can lose connection if the following situations occur:· ▪ Network problems or a power outage make the Data Center unreachable.· ▪ The computer becomes physically disconnected from the network.
`<filename> in folder <path> could not be backed up. Reason: <reason>.`	The Agent cannot back up the specified file because an error occurred when the Agent tried to read it the file, or because the Agent cannot access the file.
`The Agent could not back up <file> in <folder> because it was open or in use. Close all applications before running backups.`	A file was open during the backup and the Agent could not back up the file. Close all applications and try to run the backup again.
`An Index server request needs to be completed for this account and so the Data Center ended the backup session. Try backing up again. If this problem continues, contact Support.`	The Agent could not connect to the Data Center because of a pending Index server request.
`The Agent sent an invalid message to the Data Center and so the Data Center ended the backup session. Try backing up again. If this problem continues, contact Support.`	The Agent could not connect to the Data Center because the message sent by the Agent to the Data Center contained invalid data.

Error message	Possible cause
`Backup stopped because the Agent failed to log on to the Data Center. Try backing up again. If the problem continues, contact Support.`	The Agent could not connect to the Data Center because the logon information sent from the Agent to the Data Center was invalid.
`The Data Center terminated the transmission session (ReasonCode <code>). Try backing up again. If the problem continues, contact Support.`	The Agent could not connect to the Data Center because of an unhandled protocol.
`(No error message, but the backup fails)`	The backup failed because of an unexpected system shut down, or application failure. No error message appears in the View History Details window for the backup event.

Note

Your Agent configuration determines whether backup outcome messages appear in a pop-up window on the Agent. For more information, see *Viewing messages in pop-up windows*.

Retrieve error messages

The following table lists the most common errors that can occur during retrieval:

Error message	Possible cause
`The Agent could not retrieve <filename> because there was not enough disk space on the selected location. Try freeing up more disk space or selecting a different location.`	The target computer does not have sufficient disk space for all of the files selected for retrieval.
`Insufficient disk space available.`	The target computer does not have sufficient disk space for any of the files selected for retrieval.
`Hardware error.`	A hardware error occurred on the client system during the retrieval. The Agent could not complete the retrieval.
`Retrieve failed because your account was canceled.`	The Agent cannot perform the retrieval because the Agent account was canceled.
`Retrieve failed because your account was put on hold.`	The Agent cannot perform the retrieval because the Agent account was put on hold.
`<filename> in folder <path> could not be retrieved. Reason: <reason>`	The Agent cannot retrieve the specified file because of one of the following situations occurred: ▪ The client system did not have sufficient disk space to store the retrieved files. ▪ An error occurred while the Agent wrote the file to the client system. ▪ An error occurred while the Agent decompressed the file. ▪ The Agent cannot retrieve the file from the Data Center.

Agent warning messages

To view warning message that might occur during an Agent operation, select the event in the History pane, and then click **View**.

For descriptions of common warning messages, see the following topics:

- *Backup set size limit messages*
- *Backup warning messages*

Backup set size limit messages

The following table lists the backup set size limit messages that the Agent can receive during a backup. In addition to backup error or backup warning outcome messages, the Agent also receives the following messages:

Backup set size limit message	Possible cause
`Your Backup Set is over its size limit of <size limit>. Some of your files are not backed up. Remove unnecessary files from your Backup Set or contact your administrator or service provider to change your account to a backup plan with a larger Backup Set limit.`	The backup set size exceeds the maximum size allowed for the Agent.
`Your Backup Set is approaching its size limit of <size limit>. When you reach your limit you will no longer be able to back up all of your files. Remove unnecessary files from your Backup Set or contact your administrator or service provider to change your account to a backup plan with a larger Backup Set Limit.`	The backup set size is near the maximum size allowed for the Agent.

Backup warning messages

The following table lists the most common warning messages that can occur during a backup:

Warning message	Possible cause
`No completely successful backups occurred for more than <##> days.`	The Agent has not successfully backed up all files in the backup set for 4 or more consecutive calendar days.
`The Data Center postponed this backup because insufficient bandwidth was available. The Agent will attempt another backup in 10 minutes.`	The scheduled backup is postponed because other Agents are using most of the bandwidth allocated for backups. As a result, the minimum bandwidth required to perform a backup is not available for this Agent. The Agent retries a postponed scheduled backup every 10 minutes until the backup succeeds or fails.
`The Data Center postponed this backup because insufficient bandwidth was available.`	The manual backup is postponed because other Agents are using most of the bandwidth allocated for backups. As a result, the minimum bandwidth required to perform a backup is not available for this Agent. Retry your backup at a later time.
`<filename> in folder <path> could not be backed up because it was open.`	The Agent could not back up the file because it was in use.

Note

Your Agent configuration determines whether backup outcome messages appear in a pop-up window on the Agent. *Viewing messages in pop-up windows*.

ADVANCED RULES

If you have permission to edit your backup set, you can use the Advanced Rules window to view rules, manage user-created rules, and add volume exclusions. To open the Advanced Rules window, choose **Tools > Advanced Rules**.

If you do not have permission to edit your backup set, the Tools menu does not include **Advanced Rules**.

Agent rules and rule sets

Using the Advanced Rules window

AGENT RULES AND RULE SETS

Your Agent rule set determines which of the files on your computer the Agent selects for backup. Your system administrator creates your Agent rule set.

A rule set can include the following types of rules:

- **Locked rules** — Rules that users with permission to edit their backup set cannot override.

  In the Backup Set pane, files and folders that are included or excluded because of locked rules have a locked checkbox (or).

  If the entire contents of a folder are governed by locked rules, and some of the contents are selected for backup while the rest are deselected, the folder has a mixed locked checkbox .

  You cannot select or deselect a locked checkbox.

- **Unlocked rules** — Rules that users with permission to edit their backup set can override.

  In the Backup Set pane, files and folders that are included or excluded because of unlocked rules have an unlocked checkbox (or).

  If the entire contents of a folder are governed by unlocked rules, and some of the contents are selected for backup while the rest are deselected, the folder has a mixed unlocked checkbox .

  You can select or deselect an unlocked checkbox.

You cannot change the volume exclusions or rules from the rule set. However, if your Agent lets you to edit your backup set, then you can create additional rules called user-created rules, and you can select volumes to exclude.

For instructions, see *Managing user-created rules* and *Excluding volumes from backups*.

Rule categories

Each rule is assigned to a category. The category determines how the Agent uses the rule during a backup. The following table describes the rule categories:

Rule category	Description
User-Created Files	This category includes user-created files, such as spreadsheets and documents, in backups.
Exclusions	This category is for files, such as temporary files, that users do not need to back up or retrieve. The Agent uses this category to determine which files to exclude from backups.

How the Agent uses rules during a backup

To determine which of your computer files to select for the backup set, the Agent verifies your files against rules according to the following sequence:

1. Check files against locked rules.
2. Check files against user-created rules.
3. Check files against unlocked rules.

The Agent does not consider files on excluded volumes.

If there are multiple rules of one type (for example, multiple locked rules), the Agent checks your files against all rules of that type in top-down order before it checks your files against the next rule type. After a file matches a rule, the Agent determines whether to select that file for backup and stops the comparison process for that file. The Agent continues to compare your other files to rules until either the files match a rule or there are no more rules. If a file does not match a rule, the Agent does not select the file for backup.

Rules example

Your computer has two volumes: Macintosh HD and Volume 2. Your Agent includes the following rules:

Rule type	Rule category	Rule
Volume exclusion		Exclude volume 2
Locked rule	User-Created Files	Include all files and subfolders in */Documents
User-created rule	Exclusions	Exclude all DOC files
Unlocked rule	User-Created Files	Include all DOC files

The Agent uses the following process:

1. The Agent considers the volume exclusion. The Agent excludes volume 2 from the backup set. Therefore, the Backup Set pane does not show files on volume 2.
2. The Agent verifies files on the hard drive against the locked rule. All files in `*/Documents` match the locked rule. The Agent selects those files for backup and shows them in the Backup Set pane as selected. You cannot change the selections because the rule is locked.
3. The Agent verifies the remaining files on the hard drive against the user-created rule. The Agent does not check files in `*/Documents` because those files already match a rule. All other DOC files on Macintosh HD match the user-created rule. Because the rule is an Exclusions rule, the Agent does not select those files for backup, and does not show them in the Backup Set pane as selected. However, you can select the files for backup because the rule that governs the files is not a locked rule.
4. The Agent verifies the remaining files on Macintosh HD against the unlocked rule. The Agent does not check files in `*/Documents` or DOC files on Macintosh HD because those files already match a rule. No files match the unlocked rule, because all DOC files previously matched a different rule.

The Agent does not select any other files on Macintosh HD for backup.

Using the Advanced Rules window

Use the Advanced Rules window to view the volume exclusions and rules included in the rule set for your Agent, manage user-created rules, and add volume exclusions. To open the Advanced Rules window, choose **Tools > Advanced Rules**.

The following table describes the Advanced Rules panes:

	Description
Volume Rules	Shows the volumes on your computer, except for removable thumb drives, network volumes and case-sensitive volumes, and indicates which volumes are excluded from backups. You can use this pane to exclude additional volumes or to include volumes that you previously excluded. For instructions, see *Excluding volumes from backups*.
Locked Rules	Shows the locked rules in the Agent rule set. You cannot edit these rules, but you can copy a locked rule to create a new user-created rule. For instructions, see *Managing user-created rules*.
User-Created Rules	Shows the user-created rules that you add to the rule set. You can use this pane to add, edit, and remove user-created rules, and to change the sequence of user-created rules. When you change the sequence of user-created rules, you change the priority of the rules. For instructions, see *Managing user-created rules*.
Unlocked Rules	Shows the unlocked rules in the Agent rule set. You cannot edit these rules, but you can copy an unlocked rule to create a new user-created rule. For instructions, see *Managing user-created rules*.

Volume Rules pane

Locked Rules pane

User-Created Rules pane

Unlocked Rules pane

Excluding volumes from backups

If you do not need to back up files on a specific volume, you can exclude the volume from backup. When you exclude volumes, the Agent scans files for backup more quickly because the Agent does not need to consider files on every volume.

Only users with permission to edit their backup set can select volumes for exclusion.

By default, all volumes are included in the backup. You can choose volumes that you want to exclude from the backups, or you can include a volume that you previously excluded.

Your volume exclusions are preserved if a system administrator makes changes to the rule set for your Agent.

Note

The Agent automatically excludes removable or thumb drives, network volumes, and case-sensitive volumes from backups. These volumes do not appear in the Volume Rules pane.

To select volumes to exclude from backups, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.
2. In the Volume Rules pane, deselect the checkbox next to each volume that you want to exclude from backup.
3. To include a volume that you previously excluded, select the checkbox next to the volume.
4. To save your changes, click **OK**.

MANAGING USER-CREATED RULES

This topic describes how to manage user-created rules. Management includes the following tasks:

- Adding a user-created rule
- Copying an existing rule to create a new rule
- Editing a user-created rule
- Changing the sequence of user-created rules
- Deleting a user-created rule

To perform these tasks, you must have permission to edit your backup set.

To add a user-created rule, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.

2. Click the **User-Created Rules** tab.
3. Perform one of the following tasks:
   - If other user-created rules exist, to specify a location in the user-created rules list, select the rule above where you want to insert the new rule.
   - If there are no other user-created rules, continue to step 4.
4. Click the Add Rule button , and from the menu, click **New Rule**.

   The New Rule dialog box opens.

5. In the New Rule dialog box, enter the parameters.

   For more information, see the online help for the User-Created Rules pane.

6. Click **Save**.

   The new rule appears above the rule that you selected when you clicked **New**. If you did not specify a location in the user-created rules list, the new rule appears at the bottom of the list. For information about how to change the sequence of user-created rules, see Changing the sequence of user-created rules.

7. To save your changes, click **OK**.

Another way to add a user-created rule is to change file selections in the Backup Set pane. For more information, see *Viewing and changing your backup set*.

To copy an existing rule to create a new rule, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.

2. Click the tab that contains the rules that you want to copy.
3. Select one or more rules to copy.

   For information about how to select rules, see *Selecting rules*.

4. Perform one of the following tasks:
   - To copy a rule and leave it in its original location, click the Action menu , and then choose **Copy Rule**.
   - To delete the rule from its original location, click Action menu , and then choose **Cut Rule**.

You can click **Cut Rule** only when you copy a rule from the User-Created Rules pane.

5. Click the **User-Created Rules** tab.
6. Select the rule above which you want to paste the copied rule.
7. To paste the rule into the new location, click the Action menu, and choose **Duplicate Rule**.

   The copied rules appear above the rule that you selected in the user-created rules list. For information about how to change the rule sequence, see Changing the sequence of user-created rules.
8. If necessary, edit the rule that you copied.

   For information about how to edit rules, see Editing a user-created rule.
9. After you edit the rule, click **Save**.

   The Advanced Rules dialog box adds the new rule in the rules list.
10. To close the Advanced Rules dialog box, click **OK**.

To edit a user-created rule, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.
2. Click the **User-Created Rules** tab.
3. Select the rule that you want to edit.
4. Click the Action menu , and then choose **Edit Rule**.

   The Edit Rule dialog box opens.
5. In the Edit Rule dialog box, edit the rule parameters.

   For more information, see the online help for the User-Created Rules pane.
6. Click **Save**.

   The Edit Rule dialog box closes. The Advanced Rules dialog box adds the new rule in the rules list.
7. To close the Advanced Rules dialog box, click **OK**.

To change the sequence of user-created rules, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.
2. Click the **User-Created Rules** tab.
3. Select one or more rules that you want to move.

   For information about how to select rules, see *Selecting rules*.
4. Perform any of the following steps:
   - To move the rules up one position at a time, click the up arrow ( ).
   - To move the rules down one position at a time, click the down arrow ( ).
   - To cut the rules from the pane so that you can paste them elsewhere in the rules list, click the Action menu , and then choose **Cut Rule**. Then, select the rule above which you want to paste the rules, click the Action menu, and then choose **Paste Rule**. This inserts the rule above the one that you selected.
5. To save your changes, click **OK**.

Because the Agent applies rules in top-down order, the sequence of rules in the User-Created Rules pane is important. For detailed information about how the Agent applies rules, see *How the Agent uses rules during a backup*.

To delete a user-created rule, complete the following steps:

1. Choose **Tools > Advanced Rules**.

   The Advanced Rules dialog box opens.

2. Click the **User-Created Rules** tab.
3. Select one or more rules to delete.

   For information about how to select rules, see *Selecting rules*.

4. Click the Action menu  , and then choose **Remove Rule**.

   The rule is removed from the rules list.

5. To save your changes and close the Advanced Rules dialog box, click **OK**.

Tips for creating rules

Best practices for rules

Using wildcard characters in rule definitions

Selecting rules

When you work with rules, you can select one rule at a time, a group of consecutive rules, a group of nonconsecutive rules, or all rules. The following table describes how to select rules:

Selection	Steps
A single rule	Point to a rule and click.
A group of consecutive rules	Press and hold **`Shift`**, click the first rule in the group, and then click the last rule in the group. Support Center selects all of the rules between the two selected rules.
A group of nonconsecutive rules	Press and hold **`Command`**, and click each rule that you want to select.
All rules	Click the Action menu and choose **Select all Rules**.

Best practices for rules

When you add user-created rules, consider the following best practices:

- In the rule sequence, exclusion rules must precede other rules that match the same files. For example, you have a User-Created Files rule that includes all files in a folder, and an Exclusions rule that excludes MP3 files in the same folder. The Exclusion rule must appear first. Otherwise, the files match the user-created files rule first, and the Agent includes MP3 files in the backup.
- Create User-Created Files rules to ensure that the Agent selects the appropriate files for backup. Create Exclusions rules for files that you do not want the Agent to select for backup. Remember that the Agent does not back up files that do not match a rule.

Tips for creating rules

When you create rules, consider the following tips:

- When you create rules, remember that the rule type determines the order in which the Agent compares the files on your computer to the rules. The Agent uses rules in the following order:

  1.Locked rules

  2.User-created rules

  3.Unlocked rules

- Within each rule type, the Agent compares files to rules in top-down order. For example, if you have three locked rules, the Agent compares files to the first locked rule, then to the second locked rule, and so on. After a file matches a rule, the Agent does not compare that file to other rules.

- To keep a rule set manageable, use as few rules as possible to get the desired file selection. For example, create a single rule to include or exclude entire categories of files, such as graphics, and enter multiple comma-separated values when you select the file extensions or types.

- Do not rely on the absence of a rule to exclude a file from backup. To exclude files from backup, create an exclusion rule to specify the exclusion. For example, assume you want to exclude MP3 files from backups. Because the Agent does not consider files for backup unless the file matches a rule, you decide that you can exclude MP3 files from backup if you do not create a rule for them. However, a user creates a rule that specifies MP3 files for backup. As a result, the Agent backs up the MP3 files. To ensure that the Agent does not back up MP3 files, create a locked exclusions rule to exclude MP3 files from backup. Your locked exclusion rule overrides the user-created rule.

- When you enter names and descriptions for rule sets and rules, be as descriptive as possible. Descriptive names helps you to identify what the rule does without having to view each rule's definitions. For example, you could name rules as follows:

  - Exclude all API files

  - Back up all Word document files in Documents folder

- When you enter file names in the **File name** field, do not enter a file extension. For example, do not enter **`myreports.doc`**. Enter **`myreports`**.

- When you enter file extensions in the **Extensions** field, do not enter a leading dot (.) before the extension. For example, enter **`doc`** or **`xls`**. **Do not** enter **`.doc`** or **`.xls`**.

  Use commas to separate multiple values. For example: `xls,doc`.

  The default value is the **`*`** wildcard character. If you use the default value, the rule matches files of any type or extension, including files without extensions. If you leave either field empty, the rule matches only files that do not have extensions.

Using the Advanced Rules window

Excluding volumes from backups

Managing user-created rules

Selecting rules

Best practices for rules

Using wildcard characters in rule definitions

Using wildcard characters in rule definitions

To specify folders, file names, or file types in rule definitions, you can use the following wildcard characters:

Character	Description
***** (asterisk)	Matches any number of characters.
? (question mark)	Matches any one character.

Using wildcard characters to specify file names and file extensions

The following examples demonstrate how to use wildcard characters to specify file names and extensions in rule definitions:

File name	Matches
`reports_?`	File names that start with the word `reports_` and are followed by one character. For example: `reports_1` or `reports_a`
`*reports`	File names that end with the word `reports` and are preceded by zero or more characters. For example: `1_reports`, `my_reports`, `a_reports, reports`
`reports*`	Files that start with the word `reports` and are followed by zero or more characters. For example: `reports_1`, or `reports_abc`, or `reports`
`*`	All file names.
`.do?`	File extensions that start with `do` and are followed by one character. For example: `doc` or `dot`
`.in?`	All file extensions that begin with the letters `in` and are followed by a single character. For example: `ini` or `inx`
.*t	All files extensions that end with the letter `t` and are preceded by zero or more characters. For example: `dat`, `txt`, or `bat`
`.*`	All file extensions, including files with no extension.

Using wildcard characters to specify Type/Creator codes

The following table demonstrates how to use wildcard characters to specify file type and creator codes in rule definitions:

This file type...	Matches...
***/MSWD**	Files that have any file type code and also have the creator code MSWD.
TEXT/*	Files that have the file type code TEXT and also have any creator code.
DOC?	Files with a file type code that start with DOC and ends with any other letter (for example, DOCX or DOCM).

User Profile

Your user profile contains information that is associated with your Agent account in the Data Center.

The following topics provide information about how to edit your user profile:

User Profile overview

Edit Profile Window

Editing your user profile

User Profile overview

You can edit your user profile only if your Agent account includes permission to do so and your Agent community does not store profiles in an LDAP database.

To edit your user profile, use the Edit Profile window. When you select **Tools** > **Edit Profile**, the Agent gets your profile information from the Data Center, and then opens the Edit Profile window. If your Agent cannot contact the Data Center, it cannot open the Edit Profile window, and you cannot edit your profile. If this situation occurs, you receive a message.

After you edit your profile, the Agent synchronizes with the Data Center again to update your account.

When to edit your user profile

You might want to edit your profile under the following circumstances:

- You want to change the password for your Agent account.
- You want to change or add information, such as your email address.

  Your email address and account password are important if your Agent account grants you access to the Account Management Website.

Edit Profile Window

Editing your user profile

Editing your user profile

To edit your user profile, complete the following steps:

1. Click **Tools > Edit Profile**.

   The Synchronizing window opens, and then the Edit Profile window opens.

2. Complete any or all of the following procedures:

   - Click the **User** tab, and then enter your user information.
   - Click the **Password** tab, click **Change password**, and then enter your password information.
   - Click the **Address** tab, and then enter your address information.
   - Click the **Other** tab, and then enter your other contact information.

3. To save your changes and exit the User Profile window, click **OK**.

MESSAGES

The Agent receives new messages when it connects to the Data Center for automatic or manual backups and retrievals.

The system generates messages automatically as the result of system activity, and system administrators send messages.

Viewing Agent messages

Message type descriptions

VIEWING AGENT MESSAGES

You can view Agent messages in the following ways:

- In a pop-up window on your computer. For more information, see *Viewing messages in pop-up windows*.
- In the Messages section of the Summary pane. For more information, see *Viewing messages in the Messages section*.
- In the View History Details window for the event related to the message. For more information, see *Viewing History*.

The message type determines how you can view the message.

Viewing messages in pop-up windows

The following table lists the messages that appear in a pop-up window on the Agent computer. The table also describes the actions that you can take in response to each message. For more information about each message type, see *Message type descriptions*.

Pop-up message	Action
`Account Canceled or On Hold`	To see detailed information for the most recent backup, click **View Details**. To close the message, click **Close**.
`Backup set near or over size limit`	To see detailed information for the most recent backup, click **View Details**. To close the message, click **Close**.
`Backup outcome`	To see detailed information for the most recent backup, click **View Details**. To close the message, click **Close**. You receive this type of message in a pop-up window only if your Agent is configured accordingly.
`Missed backup`	To see detailed information for the most recent backup, click **View Details**. To close the message, click **Close**.
`Move Backup Account`	To move the account to your computer, click **Yes**. To keep the account associated with the other computer, click **No**.
`New Messages notification`	To view messages, click **OK**. To close the notification, click **Cancel**. If you click **OK**, the Summary pane opens so that you can view the Messages section.
`Retrieve outcome`	To open the folder to which files were retrieved, click **Open Folder**. To see detailed information for the most recent Retrieve event, click **View Details**. To close the message, click **Close**. **Open Folder** is available only if all of the retrieved files are in a single folder. **View Details** is available only if the retrieval completed with errors or warnings.

If the system generates more than one message, when you close a message, the next message opens.

Message type descriptions

Viewing messages in the Messages section

The Messages section of the Summary pane shows the following types of messages:

- Account Canceled or On Hold
- Missed backup
- Backup set near or over size limit
- Messages sent from a system administrator

The Agent receives new messages when it connects to the Data Center. The Messages section shows up to 50 of the most recent messages received by the Agent. Messages appear by type in the sequence shown in the previous list. Messages sent from system administrators appear in reverse chronological order. If a message includes a link, click the link to get more information about the message.

The Agent removes the following types of messages from the Messages section when the messages no longer apply:

- Account On Hold
- Missed backup
- Backup set near or over limit

Message type descriptions

Message type descriptions

This section describes the types of messages that the Agent receives when it connects to the Data Center. Connected Backup displays some messages in a pop-up window on your computer, some messages in the Messages section of the Summary, and some messages in the View History Details window. Connected Backup displays backup outcome messages appear in the Last Backup section of the Summary pane. The following table describes how to view each message type:

Message type	Description
`Account Canceled or On Hold`	You receive these messages when a system administrator changes the status of an account to Canceled or On Hold. You receive these messages in the following locations: ▪ Pop-up window * ▪ Messages section** ▪ View History Details window **Important:** If an account is on hold or canceled, backups fail. Your system administrator can help ensure that you are aware of failed backups by configuring your Agent to show backup outcome messages in a pop-up window when the Agent window is closed. *You receive these messages in the pop-up window for a backup outcome message. You do not receive them in a pop-up window. **If this message no longer applies, the Agent removes it from the Messages section when the Agent next connects to the Data Center.

Message type	Description
`Backup set near or over size limit`	These messages appear if your Agent has a maximum backup set size and has reached or is near the backup set size limit. For more information, see *Backup set maximum size*. These messages appear in the following locations: ■ Pop-up window ■ Messages section* ■ View History Details window *The next time the Agent performs a backup, if this message no longer applies, the Agent removes it from the Messages section.
`Backup outcome`	This message appears after a backup and indicates whether the backup succeeded, succeeded with warnings, succeeded with errors, or failed. These messages appear in the following locations: ■ Pop-up window* ■ View History Details window ■ Last Backup section *Your system administrator determines whether this type of message appears in a pop-up window.
`Missed backup`	These messages appear if a successful backup has not occurred on your Agent for four or more consecutive calendar days. Your Agent configuration determines whether the Agent generates this type of message. This message appears in the following locations: ■ Pop-up window ■ Messages section* *The next time the Agent connects to the Data Center, if this message no longer applies, the Agent removes it from the Messages section.

<table>
<tr><th>Message type</th><th>Description</th></tr>
<tr><td><code>Move Backup Account</code></td><td>Connected Backup displays this message before a backup if the Data Center determines the following conditions:
You used a different computer to perform the most recent backup for your account.
You have never backed up your account from your current computer.
This message opens in a pop-up window.</td></tr>
<tr><td><code>New Messages notification</code></td><td>This message opens if the Agent receives one or more new messages from a system administrator. You can view the content of this type of message in the Messages section of the Summary pane.

This message opens in a pop-up window. Although New Messages notifications do not appear in the Messages section of the Summary pane, the messages themselves open in that section.</td></tr>
<tr><td><code>Retrieve outcome</code></td><td>This message opens under the following circumstances:
Retrieval completes successfully.
Retrieval completes with errors.
Retrieval completes with warnings.
Retrieval fails.
These messages open in the following locations:
Pop-up window
View History Details window</td></tr>
<tr><td><code>Administrative messages</code></td><td>These messages are ones that system administrators send. They open in the Messages section of the Summary page.

Although Administrative messages do not open in a pop-up window, notifications of a administrative messages open in a pop-up window. See New Messages notification earlier in this topic.</td></tr>
</table>

Other message types

For information about other types of Agent messages, see the following sections:

- *Agent error messages*
- *Agent warning messages*

ABOUT UPGRADES

Your Agent receives upgrades when it connects to the Data Center. For more information about upgrades, see the following topics:

- *Upgrade overview*
- *Performing a first backup after an upgrade*

Upgrade overview

Upgrades occur when your Agent connects to the Data Center. For more information about upgrades, see the following topic:

Performing a first backup after an upgrade

Performing a first backup after an upgrade

After an Agent upgrade, you must perform a backup immediately.

To perform a first backup after an upgrade, complete the following steps:

1. In the Upgrade Welcome window, click **Start Agent**.

   The Summary pane opens.

2. Click the **Backup Set** tab.

   For information about how to change the files selected for backup, see *Viewing and changing your backup set*.

3. Click **Backup Now**.

   When the first backup completes, the Agent receives a backup outcome message from the Data Center. Your Agent configuration determines whether the Agent displays this message to you. The backup completes whether your Agent is open or closed.

4. For information about the outcome of your first backup, click the **Summary** tab, and then see the **Last Backup** section.

AGENT WINDOWS

The topics in this section describe the windows in the Agent interface.

Advanced Rules Windows

The topics in this section describe the Advanced Rules windows.

Volume Rules pane

Use the Volume Rules pane to select the volumes that you want to exclude from backups.

The Agent rule set does not include default volume exclusions.

Note

The Volume Rules pane does not show removable or network volumes.

If the Backup Set pane is open when you open the Advanced Rules window, and you save rule changes, the Agent scans the files on the computer again to update the backup set.

The following table describes the elements in the Volume Rules pane:

Element	Description
Volume	If the checkbox next to a volume name is selected, the Agent includes files on the volume in backups. If the checkbox next to a volume name is empty, the Agent excludes files on the volume from backups. If a volume is excluded from backup, the volume and its content do not appear in the Backup Set pane, and you cannot select these files for backup. Deselecting the volumes you do not want to back up decreases the time that the Agent needs to scan the computer to compile the backup set. To change volume exclusions, select or deselect the checkboxes next to the volume names. If a checkbox is unavailable, you cannot change the selection. For more information about volume exclusions, see *Excluding volumes from backups*.
OK	Saves changes and closes the Advanced Rules window.
Cancel	Closes the Advanced Rules window without saving changes.

Using the Advanced Rules window

Locked Rules pane

Use the Locked Rules pane to view details about locked rules, and to copy one or more locked rules to create new user-created rules. You cannot edit locked rules.

If the Backup Set pane is open when you open the Advanced Rules window, and you save any rule changes, the Agent scans the files on the computer again to update the backup set.

The following tables describe the elements in the Locked Rules pane:

Rules List section

Element	Description
Category	The rule category assigned to the rule: ▪ User-Created Files ▪ Exclusions
Rule Name	Unique description of the rule.
Source	For locked rules, the source is always **Administrator**, indicating that the rule comes from the rule set.

Details of Selected Rule section

Element	Description
Category	The rule category assigned to the rule: ▪ User-Created Files ▪ Exclusions
Folder	Path and folder to which the rule applies.
Scope	Whether the rule applies to files in subfolders: ▪ **Include subfolders** — The rule applies to files in the folder as well as to files in subfolders. ▪ **Exclude subfolders** — The rule applies only to files in the folder; it does not apply to files in subfolders.
File name	The full or partial names of files that this rule matches.

Element	Description
Extensions	The extensions for the types of files that match this rule. For example, **DOC,TXT,PDF**. To match this rule, a file must match either the **Extensions** value or the **Type /Creator codes** value, not both.
Type/Creator	The file types or file types and creator codes of files that match this rule. For example, ***/MSWD, TEXT/ttxt,“PDF “**. To match this rule, a file must match either the **Extensions** value or the **Type /Creator codes** value, not both.

Action Buttons

Element	Description
OK	Saves changes and closes the Advanced Rules window. If the Advanced Rules window was opened from the Backup Set window, and changes were made, the Agent scans the client again to update the backup set.
Cancel	Closes the Advanced Rules window without saving changes. If the Advanced Rules window was opened from the Backup Set window, and changes were made and applied before you clicked **Cancel**, the Agent scans the client again to update the backup set.
	Opens the Action menu.

Using the Advanced Rules window

New / Edit Rule window

Use this window to add and edit user-created rules. This window shows a red asterisk (*) next to required parameters.

If the Backup Set pane is open when you open the Advanced Rules window, and you save any rule changes, the Agent scans the files on the computer again to update the backup set.

The following tables describe the elements in the New / Edit Rule window:

Rule properties section

Elements	Description
Category	From the **Category** list, select one of the following rule types: ▪ **User-Created Files** — A rule category for user-created data files, such as spreadsheets and documents. The Agent uses these rules to identify data files to select for backup. ▪ **Exclusions** — A rule category for any file type. The Agent uses these rules to identify files to exclude from backups.
Rule name	Enter a name for the rule. You can use up to 64 alphanumeric characters.

Match Criteria section

Elements	Description
Folder	Enter the path and folder to which the rule applies. Use the following format: **/Volumes/(volume name)/(path and folder name)**. You can include wildcard characters. Examples: ▪ **/Volumes/Macintosh HD/Applications** — matches files in the `Applications` folder on the Macintosh HD volume. ▪ **/Volumes/*/Applications** — matches files in the `Applications` folder on all volumes. ▪ ***** — matches all files on all volumes. For more information about how to use wildcard characters, see *Using wildcard characters in rule definitions*.
Scope	To specify how the Agent applies this rule to the selected folder, select one of the following options: ▪ **Include subfolders** — The rule applies to files in the folder as well as to files in subfolders. ▪ **Exclude subfolders** — The rule applies only to files in the folder. It does not apply to files in subfolders.
File name	Enter full or partial names of files that you want this rule to match. Use a comma (,) to separate multiple names. You can also use wildcard characters in the name. For example, if you entered a file name of `ModemLog*`, the rule matches all files that start with `ModemLog`. The Agent uses **File name** with the **Kind** criteria to determine which files to select for backups.

Kind section

Elements	Description
Extensions	To define a rule that matches specific file extensions, select this checkbox and enter the file extensions to which this rule applies. Separate each extension with a comma. For example, **`DOC,TXT,PDF`**. Enter **`*`** to select all extensions. Leave this field blank to match files with no extension. To create a rule that encompasses bundles, specify the extension associated with the application that created the bundles. If you do not select this checkbox, the Agent ignores file extensions when it applies this rule. If you select both the **Extensions** and **Type /Creator** checkboxes, the Agent considers files that match either the **Extensions** value or the **Type/creator** value. The file does not have to match both attributes.

Elements	Description
Type/Creator	To define a rule that matches a specific file type, or a specific file type and creator code, select this checkbox and enter the value. Use the format **TYPE/CREA**, where **TYPE** represents the type code and **CREA** represents the optional creator code. Separate each code or code combination with a comma. The file type code and creator code must each be exactly four characters long. If a file type code or creator code is fewer than four characters, enclose the value in double quotation marks (**""**) and add enough space characters after the value to make it four characters long. Enter ***** in place of either code to specify all values of that file type. For example, ***/MSWD,TEXT/ttxt,"PDF "** To create a rule that encompasses bundles, specify the type or creator code that is associated with the application that created the bundles. If you do not select this checkbox, the Agent ignores file types and creator codes when using this rule. If you select both **Extensions** and **Type /Creator**, the Agent considers a file that matches all other criteria for this rule a match if it matches either the **Extensions** value or the **Type/Creator** value. The file does not have to match both attributes.

Managing user-created rules

Best practices for rules

Tips for creating rules

Using wildcard characters in rule definitions

Unlocked Rules pane

Use the Unlocked Rules pane to view details for unlocked rules, and to copy one or more unlocked rules to create user-created rules. You cannot edit unlocked rules.

If the Backup Set pane is open when you open the Advanced Rules window, and you save any rule changes, the Agent scans the files on the computer again to update the backup set.

The following tables describe the elements in the Unlocked Rules pane:

Rules list

Element	Description
Category	The rule category assigned to the rule: ▪ User-Created Files ▪ Exclusions
Rule Name	A unique description of the rule.
Source	For unlocked rules, the source is always **Administrator**, which indicates that the rule comes from the rule set.
Type/Creator	The file types, or file types and creator codes, of files that match this rule. For example, **`*/MSWD,TEXT/ttxt,“PDF “`** To match this rule, a file must match either the **Extensions** value or the **Type/Creator** value. It does not have to match both values.

Details of Selected Rule section

Element	Description
Category	The rule category that is assigned to the rule. The Agent uses the following rule categories: ▪ User-Created Files ▪ Exclusions
Folder	Path and folder to which the rule applies.

Element	Description
Scope	Whether the rule applies to files in subfolders. The scope is one of the following values: ▪ **Include subfolders** — The rule applies to files in the folder as well as to files in subfolders. ▪ **Exclude subfolders** — The rule applies only to files in the folder; it does not apply to files in subfolders.
File name	The full or partial names of files that this rule matches.
Extensions	The extensions for the types of files that match this rule. For example, **`DOC,TXT,PDF`**. To match this rule, a file must match either the **Extensions** value or the **Type /creator codes** value, not both.
Type/Creator	The file types or file types and creator codes of files that match this rule. For example, **`*/MSWD,TEXT/ttxt,“PDF “`**. To match this rule, a file must match either the **Extensions** value or the **File type /creator codes** value, not both.

Action buttons

Element	Description
OK	Saves changes and closes the Advanced Rules window.
Cancel	Closes the Advanced Rules window without saving changes.
	Opens the **Action** menu.

Using the Advanced Rules window

User-Created Rules pane

Use the User-Created Rules pane to view, add, edit, or delete user-created rules, change the sequence of user-created rules, and copy user-created rules to create new rules.

If the Backup Set pane is open when you open the Advanced Rules window, and you save any rule changes, the Agent scans the files on the computer again to update the backup set.

The following tables describe the elements in the User-Created Rules pane.

Rules list

Element	Description
Category	The rule category that is assigned to the rule. The Agent uses the following rule categories: ▪ User-Created Files ▪ Exclusions
Rule name	Unique description of the rule.
Source	The source of the rule: ▪ **Advanced rules** — The rule was added from the Advanced Rules pane. ▪ **Backup Set selection** — The rule was added automatically as the result of file selection changes made in the Backup Set pane.

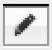
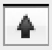
Details of Selected Rule

To view details for a rule, click the rule. Rule details appear in the Details of Selected Rule field.

Element	Description
Category	The rule category assigned to the rule: ▪ User-Created Files ▪ System or Application Files. If your Agent is configured for Data Only backups, this selection is unavailable. ▪ Exclusions
Folder	Path and folder to which the rule applies.

Element	Description
Scope	Whether the rule applies to files in subfolders: ▪ **Include subfolders** — The rule applies to files in the folder as well as to files in subfolders. ▪ **Exclude subfolders** — The rule applies only to files in the folder; it does not apply to files in subfolders.
File name	The full or partial names of files that this rule matches.
Extensions	The extensions for the types of files that match this rule. For example, **`DOC,TXT,PDF`**. To match this rule, a file must match either the **Extensions** value or the **File type /creator codes** value, not both.
Type/creator codes	The types or types and creator codes of files that match this rule. For example, **`*/MSWD,TEXT/ttxt,"PDF "`**. To match this rule, a file must match either the **Extensions** value or the **Type /creator codes** value, not both.

Action buttons

Element	Description
	Opens the **New Rule** window. For more information, see *New / Edit Rule window*
	Deletes the selected rule.
	Lets you edit a rule.
	Opens the Action menu.
	Moves one or more selected, contiguous rules up one position in the Rules list.
	Moves one or more selected, contiguous rules down one position in the Rules list.
OK	Saves changes and closes the Advanced Rules window.

Element	Description
Cancel	Closes the Advanced Rules window, but does not save changes.

New / Edit Rule window

Using the Advanced Rules window

Managing user-created rules

Backup Windows

The topics in this section describe the Backup windows.

Backing Up progress bar

The Backing Up progress bar appears while a backup is in progress.

The following tables describes the elements in the Backing Up progress bar:

Element	Description
Progress bar	Shows what percentage of the current backup is complete.
Backup status message	Indicates which phase of the backup is in progress. For more information, see *Monitoring backup progress*.

Backup Schedule window

If your Agent account has backup scheduling permissions, you can use this window to modify the automatic backup schedule for your Agent, or disable automatic backups. Your system administrator sets your default backup schedule.

The following table describes the elements in the Backup Schedule window:

Element	Description
Backup automatically according to the following schedule	Runs backups automatically during a specified time range on selected days. For an automatic backup to occur, the computer must be powered on so that the Agent service is running. The Agent window does not have to be open. Select a backup time range during which the computer will be powered on, and when the resources the Agent needs to perform the backup will not interfere with your work. To select a time schedule, use the following elements: ▪ **Days of the week** checkboxes. Select the checkbox for each day when you want a backup to run. Deselect the checkbox for any day when you do not want a backup to run. You must select at least one day. ▪ **Earliest time** list. Select a time from the list to specify the start of the backup time period. This time is the earliest that the Agent begins a scheduled backup. It applies only to days when scheduled backups run. You select a time period rather than a specific time so that the Agent can perform the backup at the most appropriate time within the specific time period. ▪ **Latest time** list. Select an option from the list to specify the end of the backup time period. This time is the latest that the Agent begins a scheduled backup. It applies only to days when scheduled backups run. For example, to run backups five days a week between 5:00 and 6:00 at night, select the checkboxes for Monday through Friday, and deselect the checkboxes for Saturday and Sunday. Then select 5:00 PM from the **Earliest time** list and 6:00 PM from the **Latest time** list.
Do not back up automatically	Backups occur only when the user initiates them. There are no automatic backups.

Changing your backup schedule

Summary pane information

Backup Set pane

The Backup Set pane indicates which files and folders on your computer that the backup set includes.

Note

The Backup Set pane does not show removable drives, network volumes, or case-sensitive volumes.

To use the Backup Set pane, you must have permission to edit your backup set.

The first time you open the Backup Set pane during a session, the Agent scans the files on your computer. During the scan, the Backup Set pane shows a question mark (?) next to each folder. The question mark indicates that the Agent is determining whether to select the contents of the folder for backup. When the scan is complete, the checkbox next to each file or folder indicates whether the file or folder is selected for the backup set.

The following table describes the elements in the Backup Set pane:

Element	Description
Folders list	In the left pane, an expandable list of the folders on your computer. To navigate in this pane, perform one of the following tasks: ▪ Click the name of a folder to view the contents of the folder in the right pane. ▪ Expand or collapse a folder to show or hide its subfolders in the left pane. The checkbox to the left of a folder name indicates whether the subfolders and files in that folder are selected for backup.
Content list	In the right pane, a list of the subfolders and files in the folder that you selected in the left pane. Double-click a folder name in the right pane to show its contents. The Contents list includes the following information: ▪ A checkbox that indicates whether an individual folder or file is selected for the backup. For more information, see file selection icons. ▪ **Name** — The name of a folder or file. ▪ **Date Modified**—The date the file last changed. ▪ **Size** — The size of a file. ▪ **Kind** — The type of file, based on your the file type associations for your system. To sort the list, click a column heading. An up or down arrow (for ascending or descending sort order) appears in the column heading.
Status bar	Shows the total number of files selected in the backup set, the total size of the selected files in the backup set, and, if applicable, the maximum backup set size for your Agent.
Back Up Now	Lets you manually start a backup.
Undo All Changes	Lets you restore the backup set selections that were in effect when you started this session.

The backup set

Viewing and changing your backup set

Undoing changes to the backup set

Backing up files manually

Toggling Simple and Advanced view

Unlocked Files Added to Backup Set window

The Unlocked Files Added to Backup Set window opens if you attempt to add an entire folder to the backup set, but the folder contains locked subfolders or files as well as unlocked ones. You cannot select the locked subfolders and files for backup because the Agent rule set includes locked rules that prevents those files from being backed up. However, all unlocked subfolders and files in the selected folder are selected for the backup set.

The following tables describes the element in the Unlocked Files Added to Backup Set window:

Element	Description
Close	Closes this window. In the Backup Set pane, the checkbox next to the name of the folder that you attempted to select appears partially selected. This appearance indicates that some subfolders and files in the folder will be backed up, while others will not.

Unlocked Files Removed from Backup Set window

The Unlocked Files Removed from Backup Set window opens if you attempt to remove an entire folder from the backup set, but the folder contains locked subfolders or files as well as unlocked ones. You cannot remove the locked subfolders and files from the backup set because the Agent rule set includes locked rules that specify those files for backup. However, you can remove all unlocked subfolders and files in the folder.

The following tables describes the element in the Unlocked Files Removed from Backup Set window:

Element	Description
Close	Closes this window. In the Backup Set pane, the checkbox next to the name of the folder that you attempted to select appears partially selected. This appearance indicates that some subfolders and files in the folder will be backed up, while others will not.

HISTORY WINDOWS

The topics in this section describe the History windows.

History pane

Use the History pane to view events that the Agent records during backup, retrieval, account registration, account recovery, and account software upgrade or file list synchronization.

You can use the History pane to determine whether backups and retrievals were successful, and where errors occurred. For example, for a backup event, you can see which files the Agent successfully backed up, and which files it could not back up because of system problems.

The History pane lists events in chronological order with the most recent event at the top of the list. To sort events, click a column heading. An up arrow appears in the column heading to indicate ascending sort order, and a down arrow appears in the column heading to indicate descending sort order.

The following tables describes the elements in the History pane:

Element	Description
Status icons	Indicates the status of the event. The History pane uses the following icons:  — Completed successfully  — Completed with warnings, or postponed  — Failed, canceled by user, or completed with errors
Event	Identifies the type of event that occurred. For a list of events, see *Agent events*.
Outcome	Describes the outcome of the event. The History pane uses the following outcomes: ▪ **Canceled by user** —You stopped the operation while it was in progress. ▪ **Completed successfully** — The event completed successfully. ▪ **Completed with errors** — The event completed, but problems occurred during the event that affected the final outcome. For more information, see *Agent error messages*. ▪ **Completed with warnings** — The event completed, but problems occurred during the event that affected the final outcome. For more information, see *Agent warning messages*. ▪ **Failed**—A critical error occurred and the Agent could not complete the operation.
Start time	Date and time that the event began.

Element	Description
End time	Shows the date and time that the event stopped.
Export	Exports event details to a TXT or XML file that you can mail to your technical support representative.
View	Shows event details.

View History Details window - Agent install/Account recovery

The View History Details window shows detailed information about events that occur during an account recovery.

The following table describes the elements in the View History Details window:

Element	Description
Agent install/Account recovery outcome	Shows the result of the account recovery. Account recovery can have the following outcomes: ▪ Completed successfully ▪ Completed with errors ▪ Failed ▪ Canceled by user For more information about each outcome type, see *History pane*.
Errors	Lists errors that occurred during the account recovery. For descriptions of the errors that might occur, see *Installation and account recovery error messages*.
Export	Saves the event details to a TXT or XML file that you can mail to your technical support representative.
Close	Closes the window and returns to the History pane.

View History Details window - Agent software upgrade

The View History Details window shows detailed information about events that occur during an Agent upgrade.

The following table describes the elements in the View History Details window:

Element	Description
Agent software upgrade	Shows the result of the upgrade. Agent software upgrades can have the following outcomes: ▪ **Completed successfully** ▪ **Completed with errors** ▪ **Failed** ▪ **Canceled by user** For more information about each outcome type, see *History pane*.
Errors	Lists errors that occurred during the Agent upgrade.
Export	Saves the event details to a TXT or XML file that you can mail to your technical support representative.
Close	Closes the window and returns to the History pane.

View History Details window - Backup

The View History Details window shows detailed information about the events that occur during backup.

The following tables describe the elements in the View History Details window:

Summary section

Element	Description
Backup outcome	Result of the backup. Backups can have the following outcomes: ▪ **Canceled by user** ▪ **Completed successfully** ▪ **Completed with errors** ▪ **Completed with warnings**, **Failed**, and **Postponed** For more information about each outcome type, see *History pane*. **Note**: If a backup fails, but no error message appears, the system might have shut down unexpectedly, or an application might have failed.
Total Time	Duration of the event in hours, minutes, and seconds.
Total size of backup set	Total number and size of the files in your backup set.
Files that needed backup	Number of files in your backup set that were not previously backed up, or that had changes that required backup.
Files backed up	Of the files that the Agent selected for backup, the number of files that the Agent actually backed up.
Files not backed up	Of the files that the Agent selected for backup, the number of files that the Agent did not back up.
Size of files backed up	Total size of all files that the Agent successfully backed up during the session.
Size after optimization	Total size of backed up data after SendOnce® and Delta Block® optimization completes.

Element	Description
Size of data sent	Total size of backed up data that is transmitted to the Data Center after compression occurs.
Errors list	Errors that occurred during the backup. For more information, see Backup error messages.
Warnings list	Warnings that occurred during the backup. For more information, see *Backup warning messages*.

Files Backed Up section

Files Backed Up list	Shows the file names and the path to the file folder for each file that the Agent successfully backed up. This section appears only if the Agent backed up one or more files.
Export	Saves the event details to a TXT or XML file that you can mail to your technical support representative.
Close	Closes the window and returns to the History pane.

View History Details window - Internal Diagnostic

The View History Details window lets you export diagnostic event information. Typically, you need to export diagnostic event information only when you work with Support to solve an Agent problem.

The following table describes the elements in the View History Details window:

Element	Description
Internal diagnostic outcome	Shows the result of the internal diagnostic. The internal diagnostic can have the following outcomes: ▪ **Completed successfully** ▪ **Failed** If the outcome is **Failed**, a message appears with more information about the event.
Export	Saves the event details to a TXT or XML file that you can mail to your technical support representative.
Close	Closes the window and returns to the History pane.

View History Details window - Retrieve

The View History Details window shows detailed information about the events that occurred during a retrieval.

The following sections describe the elements in the View History Details window.

Summary section

Element	Description
Retrieve outcome	Result of the retrieval. Retrievals can have the following outcomes: ▪ **Completed successfully** ▪ **Completed with warnings** ▪ **Completed with errors** ▪ **Failed** ▪ **Canceled by user** For more information about each outcome type, see *History pane*.
Files retrieved	Number of files retrieved and the numbers of files selected for Retrieve.
Size of files retrieved	Size, in megabytes, of the files that the Agent retrieved. This value includes the size of the files after the Agent decompresses them.

Errors list

This section shows errors that occurred during a retrieval or when you cancel a retrieval. For a list of error messages, see *Retrieve error messages*.

Files Retrieved list

Element	Description
Files Retrieved list	Shows the file name and path to the folder for each file that the Agent successfully retrieved. This section appears only if the Agent retrieved one or more files.
Export	Saves the event details to a TXT or XML file that you can mail to your technical support representative.
Close	Closes the window and returns to the History pane.

PREFERENCES WINDOW

The topics in this section describe the Preferences window.

Backup Options pane

The Backup Options pane lets you view and modify backup options set by your system administrator.

The following table describes the elements in the Backup Options pane:

Element	Description
Backup Mode	Specifies the behavior of the Agent if it cannot to start a scheduled backup. You can select the following options: ▪ **Aggressive mode — if a scheduled backup cannot start, periodically retry**. Select this option if you want the Agent to try to start the scheduled backup until the backup starts. ▪ **Passive mode — if a scheduled backup cannot start, sleep until the next scheduled or manual attempt**. Select this option if you want the Agent to wait for the next scheduled or manual backup before it attempts another backup.

Changing your backup options

FileVault pane

The File Vault pane lets you manage the Mac OS® X account and password combinations that the Agent needs to back up FileVault-protected files if you are not logged on to your computer during a backup. Without this information, the Agent does not back up FileVault-protected files unless you are logged on to your computer during a backup.

The following table describes the elements in the File Vault pane:

Element	Description
Enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out.	Enables the **Account User Name** field pop-up menu and the **Password** field.
Account User Name	Determines which FileVault-protected home folder to access when the user is logged out during a backup. This option is available only after you select **Enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out**. The menu includes user names for accounts that have a FileVault-protected home folder. The default selection is the name of the user currently logged on to the computer, or the user name that was last selected.
Password	Enables you to specify the password needed to gain access to the home folder that is associated with the account user name.
Cancel	Closes the window without saving your changes.
OK	Saves your changes and closes the window. If you selected **Enable the Agent to back up the contents of your FileVault-protected home folder when you are logged out**, the Agent validates the password for the selected user account name.

Managing FileVault passwords

RETRIEVE WINDOWS

The topics in this section describe the Retrieve windows.

Retrieve window

The Retrieve window opens after you select files to retrieve in the Retrieve pane and click **Retrieve**.

The following tables describe the elements in the Retrieve window:

Element	Description
Retrieve Location	Select one of the following options: ■ **New Location**— Retrieves the selected files to a new location. Specify a new location for the retrieved files. ■ **Original Location** — Retrieves the selected files to their original locations. During the retrieval, the Agent adds missing folders as needed to recreate the original locations. When you select this option, the following options become available: - **Rename the files being retrieved** — If you retrieve a file that has the same name as a file in the destination folder, but contains data that is different than the file in the destination folder, the Agent adds the word “Restored” and a sequential number to the end of the name of the file in the destination folder. For example, if, under these circumstances, you retrieve a file named `Report.doc`, the Agent renames the file in the destination folder to `Report Restored 1.doc`. This option is available only if you select **Original Location**. - **Overwrite the files on my computer** — If you retrieve a file that has the same name as a file in the destination folder, but contains data that is different than the file in the destination folder, the Agent overwrites the file in the destination folder with the retrieved file. This option is available only if you select **Original Location**.
Retrieve Information	Number of files selected for retrieval on the Retrieve pane and the total size of the selected files.
Retrieve	Starts the Retrieve operation.
Cancel	Cancels the Retrieve operation.

Retrieve pane

Use the Retrieve pane to retrieve previously backed-up files from the Data Center. You can use Retrieve to recover files that were lost, deleted, or damaged.

This pane contains the following elements:

Element	Description
Show Versions	Select which version of your backed-up files to show on the Retrieve pane. You can select the following options: ▪ **Most Recent** — Show only the most recent file versions. ▪ **As of Backup Date —** Show files backed up on a specific date. Opens the *Retrieve - Version as of Backup Date* window. ▪ **All —** Show all versions of your backed-up files. Expired versions that have been purged from the Data Center do not appear.
Find	Enter the full or partial name of a file (including the extension) or folder that you want to find. You can include wildcard characters in the **Find** field. The Find feature includes the following buttons: ▪  — Start a search or proceed to the next matching file. ▪  — Go back to a previous match.
Backed-up Files list (left pane)	Shows an expandable list of previously backed-up folders on your computer. The list is based on the option selected in the **Show Versions** list. Navigate this pane in one of the following ways: ▪ Click a folder name to view backed up subfolders or files in the right pane. ▪ Expand or collapse a folder to show or hide its backed-up subfolders in the left pane. The checkbox to the left of a folder name indicates whether the backed-up subfolders and files in that folder are selected for Retrieve.

Element	Description
Contents list (right pane)	Shows the backed-up content for the folder selected in the left pane. A backed-up file can appear more than once in this pane, depending on which **Show Versions** option you selected. Use the file size and date information to select the appropriate version of the file. Double-click a folder name in the right pane to show its backed-up contents in the right pane. The Contents list shows the following information for backed-up files: ▪ A checkbox that indicates whether a folder or file is selected for Retrieve. ▪ **Name** — The file name. ▪ **Date Modified**— The date and time the file was modified. ▪ **Size** — File size in kilobytes (KB). ▪ **Kind**— The file or folder type. To sort the list, click a column heading. An up or down arrow (for ascending or descending sort order) appears in the column heading.
Status bar	The Agent shows status information below the **Backed-up Files** list. The status bar shows the total number and total size of the files selected for retrieval.
Retrieve	Opens the *Retrieve window*.

Finding files for retrieval

Retrieve error messages

Retrieve - Version as of Backup Date

Retrieve overview

Toggling Simple and Advanced view

Retrieve - Version as of Backup Date

Use the Retrieve - Version as of Backup Date window to select a specific backup set that contains files that you want to retrieve.

The following tables describes the elements in the Retrieve - Version as of Backup Date window:

Element	Description
Backup date and time	A list of dates and times when the Agent backed up files to the Data Center. This list shows one of the following in descending order: ▪ Backup dates and times for the last 60 days. ▪ If fewer than 20 backups occurred during the last 60 days, the last 20 backups. The default selection is the most recent backup.

Retrieving Files progress bar

The Retrieving Files progress bar appears when a file retrieval is in progress.

This progress bar includes the following elements:

Element	Description
Progress bar	Shows the percentage of the current retrieval that is complete.
Retrieval status message	Indicates the phase of the retrieval that is in progress.

Edit Profile Window

Use the Edit Profile window to change or add to the information in your profile. Your profile is information in the Data Center that is associated with your Agent account.

Your Agent configuration determines the tabs and fields that the Edit Profile window displays. For example, your Agent configuration might exclude the **Address** tab and the **Other** tab. Also, your configuration might exclude fields from the Edit Profile window or make some fields inaccessible or required.

Edit Profile window - User pane

Edit Profile window - Password pane

Edit Profile window - Address pane

Edit Profile window - Other pane

Editing your user profile

Edit Profile window - User pane

Use this pane to change the information that is associated with your account. Your Agent configuration determines which elements that the pane displays.

Element	Description
Name	
First name	Your first name
Middle name	Your middle name
Last name	Your last name
Email Address	
Email address	Your email address
Phone Number	
Phone number	Your phone number
Extension	Your phone extension number
Action Buttons	
OK	Saves changes and closes the Edit Profile window
Cancel	Closes the Edit Profile window, but does not save changes

Edit Profile Window

Edit Profile window - Password pane

Edit Profile window - Address pane

Edit Profile window - Other pane

Editing your user profile

Edit Profile window - Password pane

Use this pane to change the password for your Agent account. Your Agent configuration determines which elements that the pane displays.

Element	Description
Password	
Change password	Enables a field that lets you enter a new password
Current password	The password for your Agent account
New password	The new password for your Agent account
Confirm new password	The password that you entered in the **New password** field
Action Buttons	
OK	Saves changes and closes the Edit Profile window
Cancel	Closes the Edit Profile, but does not save changes

Edit Profile Window

Edit Profile window - Address pane

Edit Profile window - Other pane

Editing your user profile

Edit Profile window - Address pane

Use this pane to change the address information that is associated with your Agent account. Your locale determines the fields that the pane displays.

Element	Description
Address	
Country	The country of your address
Address line 1	The first line of your address
Address line 2	The second line of your address
Address line 3	The third line of your address
City	The city of your address
State	The state of your address
Zip code	The Zip Code for your address
Action Buttons	
OK	Saves changes and closes the Edit Profile window
Cancel	Closes the Edit Profile window, but does not save changes

Edit Profile Window

Edit Profile window - Password pane

Edit Profile window - Other pane

Editing your user profile

Edit Profile window - Other pane

Use this pane to add or change additional contact information that is associated with your Agent account. Your Agent configuration determines the elements that the pane displays.

Element	Description
Other Contact Information	
Company	Your company
Department	Your department
Location	Your location
Mail stop	Your mail stop
Cost center	Your cost center
Employee ID	Your employee ID number
Action Buttons	
OK	Saves changes and closes the Edit Profile window
Cancel	Closes the Edit Profile, but does not save changes

Edit Profile Window

Edit Profile window - Password pane

Edit Profile window - Address pane

Editing your user profile

Welcome Windows

This section describes the Welcome windows.

Welcome to the Agent window

Your Agent configuration determines whether a Welcome window opens when you open the Agent for the first time.

To review your backup set, close the Welcome to the Agent window. After you close the Welcome to the Agent window, the Agent scans the files on your computer to compile your backup set.

About your first backup

Perform your first backup as soon after Agent installation as possible. During the first backup, the Agent backs up the files in your backup set to the Data Center. The first backup can take several hours to complete. The number of files in your backup set and the connection speed of the network determine how long the first backup takes. Subsequent backups are smaller and faster because the Agent backs up only new files and changes to previously backed–up files.

Backup methods

Your Agent can back up files according to a pre-set schedule, or it can require you to initiate backups manually. For your first backup, you might want to start the backup manually, rather than wait for a scheduled automatic backup.

Performing your first backup

To perform your first backup, complete the following steps:

1. Close the Welcome to the Agent window.

   The Backup Set pane opens. The Backup Set pane lists the files that are in your backup set. Your Agent configuration determines whether you can change your backup set. For more information about how to change your backup set, see *Viewing and changing your backup set*.

2. To start the backup, click **Back Up Now**.

   The Agent displays the Backing Up window. This window describes the progress of the backup process.

   During a backup, the following tabs are unavailable:

   - Summary
   - Backup Set
   - Retrieve
   - History

   For more information about how to check the status of your first backup, see *Monitoring backup progress*.

When the first backup completes, the Agent receives a backup outcome message from the Data Center. To view information about the outcome of your first backup, open the Summary pane, and then view the **Last Backup** section.

File security

When the Agent or Data Center transmit files to each other, encryption keeps your files secure. The Agent encrypts your files before it backs them up. The files remain encrypted while the Data Center stores them. When the Agent retrieves backed–up files, it receives the files in encrypted format. The Agent decrypts the files after they are on your computer.

Performing your first backup

Changing your backup schedule

Changing your backup options

Backing up files manually

SUMMARY WINDOWS

The topics in this section describe the Summary windows.

Messages window

The Messages window shows up to 50 of the most recent messages received by the Agent. Agents receive messages in the following ways:

- A system administrator sends the message.
- The Agent generates the message automatically as the result of system activity.

The Agent receives new messages when it connects to the Data Center.

The following table describes the elements in the Messages window:

Element	Description
Message icon, date, and content	Messages that describe the outcome of the backup. Messages appear by type and date received in the following sequence: **Account Canceled or On Hold, or Backup Set is over size limit** **Missed backup** **Backup set over size limit** **Messages sent from a system administrator or service provider** The most recent messages appear first. The Agent removes the following message types from the Messages window when they are no longer applicable: ▪ Account On Hold ▪ Missed backup ▪ Backup set near or over limit. For information about each message type, see *Message type descriptions*.
Message links	A link to more information about the message. If a message includes a link, click the link.
Scroll bar	A scroll bar that lets you view all messages.
Close	Closes the window.

Viewing messages in the Messages section

Summary pane

The following tables describe the elements in the Summary pane:

Last Backup section

Element	Description
Outcome icon and description	The outcome of the last backup. Backups result in one of the following outcomes: — **Canceled by user** You canceled the backup after it started. — **Completed successfully** Backup completed without warnings or errors. — **Completed with errors** Backup completed, but the Agent encountered error conditions. For more information, see *Backup error messages*. — **Completed with warnings** Backup completed, but the Agent encountered warning conditions. For more information, see *Backup warning messages*. — **Failed** A fatal error occurred. The Agent could not run or complete the backup.
End time	The date and time when the last backup completed.
View Details link	A link that lets you view history details for the last backup.

Backup Schedule section

Element	Description

Backup Schedule	Backup schedule that the Agent uses.
	If automatic backup is enabled, this sections shows the day and time settings for the automatic backup. For example:
	`Monday-Wednesday, Saturday`
	`8:00 PM - 1:00 AM`
	If automatic backup is disabled, this section shows **None**.
	If your Agent lets you edit your backup schedule, the schedule appears as a link. Click the link to open the *Backup Schedule window*.

Next automatic backup	The date and time of the next scheduled backup.

Messages section

Element	Description
Messages	The date received and up to four lines of text from the most important or most recent message that the Agent received. For more information about the messages shown in this section, see *Viewing messages in the Messages section*.
Show all messages link	Click to open the *Messages window* to view up to 50 of the Agent's most recent messages.

Action buttons

Element	Description
Back Up Now	Starts a backup. For more information, see *Backing up files manually*.