Retrospect 9 for Mac User's Guide Addendum

© 2011 Retrospect, Inc. All rights reserved.

Introduction

This addendum to the Retrospect User's Guide describes new functionality introduced in Retrospect 9. It is assumed that the user is already familiar with the operation of Retrospect in general, as well as the computing systems that Retrospect is used to protect. For a more thorough description of how to use Retrospect, please consult the Retrospect 8 User's Guide.

In this guide

Client software improvements

Retrospect Client software allows individual users to control aspects of the backup and restore operations performed on their computers. The Mac client software has been redesigned in Retrospect 9. The changes include:

- User-initiated backups and restores
- Better-organized preference panels with enhanced options
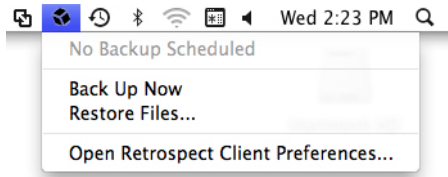- A menu bar icon and status menu

Note: The Retrospect system administrator has the ability to restrict access to some of these features. For more information, see *Locking client features and preferences* on page 8.

User-initiated backups and restores

Mac users now have the ability to restore files and request backups directly from their desktop.

When the Retrospect Client software is installed, a Retrospect icon is added to the menu bar. Click the icon to open a menu you can use to initiate a backup or restore operation.

User-initiated backups

This backup method is best if you need to quickly protect a few files or folders. It is not meant to be a substitute for regular backups and cannot be used to perform a full system backup of your computer.

To perform a user-initiated backup:

1   Click the Retrospect icon on the menu bar.

2   Select **Back Up Now**.

3   Use the Backup Files and Folders dialog to select the items to backup.

4   Click **Back Up**.

Notes about user-initiated backups:

- The Back Up Now and Restore Files menu items are inactive until the client computer has been logged into a Retrospect server where these options are activated.

- By default, backed up files and folders are stored on a Media Set chosen by the system administrator using the Retrospect console's Clients preferences. The Media Set is selected using the **Back up on demand** popup list.

User-initiated restores

Restores can be initiated from the client computer's menu bar or by clicking the Restore button on the preference pane's History tab. See *History preferences* on page 6 for more information.

To perform a user-initiated restore from a Mac Client:

1 Click the Retrospect icon on the client computer's menu bar.

2 Select **Restore Files**.

3 In the Restore Files and Folders window, select a backup from the popup menu that contains the files you would like to restore. It may take some time for Retrospect to display the list of files and folders contained in the backup.

4 Select the files or folders to restore.

5 Click **Restore**.

6 If you are restoring files to a location that already exists, a confirmation dialog will appear. To choose a different location, click **Browse**. To continue, click **Restore**.
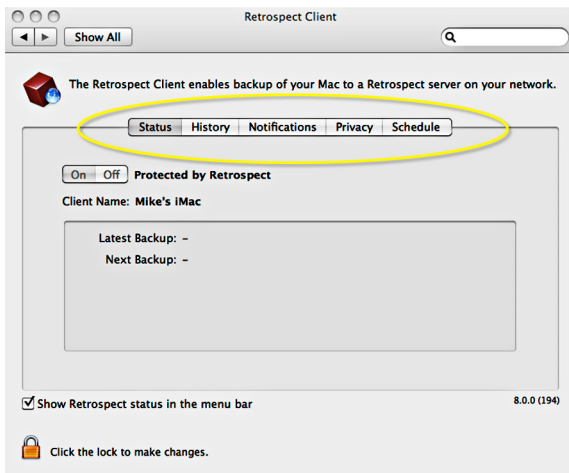
Improved client preferences

The Retrospect Client preferences can be accessed in the following ways:

- Click on the Retrospect menu icon on the menu bar. Select **Open Retrospect Client Preferences**.

- Click System Preferences in the Dock. Click the Retrospect Client icon.

- From the Apple menu, choose **System Preferences**. Click the Retrospect Client icon.

Setting client preferences

Preferences are grouped into the following categories: Status, History, Notifications, Privacy, and Schedule. Click one of the category buttons to access the settings.

Preferences are described in more detail below:

Status preferences

- **On/Off**: The On and Off buttons control access to the client by the backup computer. Each time the client computer starts, access is turned on. To disable access, click **Off**.

- **Client Name**: The client name and the client IP address being used by Retrospect are displayed here.

- **Status area**: Information about your latest and next backups are displayed. If a backup is running, a progress bar is shown.

History preferences

- **History area**: Your disk-based backups are listed here. In each row you will find information about the backup and a Restore button. A green icon indicates the backup completed successfully. A yellow icon indicates there was a problem with one or more files in the backup. A red icon indicates the backup failed. To start a restore operation using one of these backups, click the corresponding **Restore** button.

Notifications preferences

- **Notify after backup**: Displays a message after the completion of a backup or other operation.

- **Notify if no backup in *N* days**: Displays a message if the client has not been backed up within the number of days specified in the entry box.

- **Report SMART errors**: Requests an immediate backup from Proactive Backup (if applicable) when Retrospect learns of errors on the client's SMART hard drive volumes. This setting is off by default.

Privacy preferences

- **Privacy area**: This area displays any files or folders designated as Private. Private files are not visible to the Retrospect server and are not backed up. Drag files or folders to this panel to designate them as Private.

- **Add/Remove buttons**: To add files or folders to your Privacy list, click the **Add** button and navigate to the files or folders you wish to add. To remove an item from your list, select it in the Exclude area, and click the **Remove** button.

- **Allow Retrospect to change files on my system (Required for restore):** When this option is unchecked, the client can be backed up, but files on the client cannot be restored, modified, or deleted by the backup computer. This setting is on by default.

Note: Previous versions of the Mac client software allowed you to designate a file as Private by adding a bullet character at the beginning or end of the file name. This method is no longer supported. To maintain the private status of files marked this way, use your Mac's Find tool to search for filenames containing the bullet character (Option-8). Drag the desired files from the search results pane to the Privacy pane.

Schedule preferences

- **Delay proactive backups until after [date & time]**: Prevents the backup computer from backing up the client computer before the specified time and date, up to one week from the present time. (Click on the time and date or click the arrows to make changes.)

Locking client features and preferences

The Retrospect system administrator has the ability to prevent users from changing certain client settings. For instance, you may not want users to be able to keep their computers from being backed up.

The most efficient workflow for a system administrator is to establish a set of standard lockout preferences, and then make any desired customizations on a client-by-client basis. The steps below explain how to do this.

To set the default lockout preferences:

1 The lockout controls are in the Retrospect console. Choose Retrospect > **Preferences** and click the **Clients** tab.

2 in the "Allow Clients to" section, modify one or more of the following preferences:

- **Turn off the** Retrospect **Client software**: When checked, this preference allows users to hide their client from the Retrospect server. All communication between the server and the client will be cut. Any backups schedule to run while the client is turned off will be skipped.

- **Stop running backups**: When checked, this preference allows client users to stop operations that are in progress.

- **Exclude items from backups**: When checked, this preference allows users to mark files, folders, and volumes as Private, making them invisible to Retrospect.

- **Set read access only**: When checked, this preference allows clients to prevent Retrospect from writing to or deleting files on their computer.

- **Back up on demand to**: When checked, this preference allows clients to initiate on-demand backups to the Disk Media Set selected in this popup menu.

- **Restore on demand**: When checked, this preference allows clients to initiate on-demand restores from available Disk Media Sets.

To customize these default preferences for an individual client:

1 Select **Sources** in the Retrospect console sidebar.

2 Select a client from the list.

3 Click the **Options** tab.

4 Modify the preference settings as desired for this client.

5 Repeat Step 1 to Step 4 for each client you wish to customize.

Other improvements

Retrospect 9 includes these additional new features:

Support for Mac OS 10.7

Both the Retrospect console application and the Retrospect Client software support Mac OS X 10.7 Lion and Mac OS X 10.7 Lion Server. See the Retrospect Read Me for a full listing of supported operating systems.
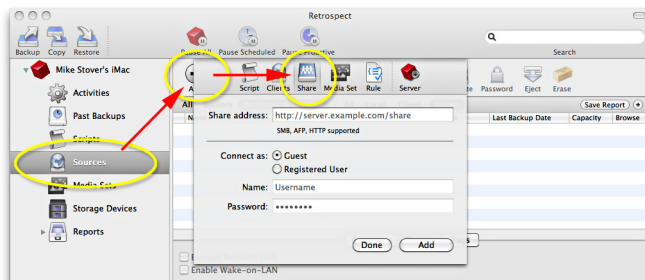
Adding network shares

Network shares can be backed up or used as a backup location. Identifying shares and adding them to your projects is now easier than ever.

To add a share as a source:

- Click **Sources** > **Add** > **Share**. Enter the share address and any required log-in information.

To add a share as a backup location:

- Click **Media Sets** > **Add** > **Share**. Enter the share address and any required log-in information.

Support for WebDAV shares

WebDAV extends the HTTP protocol to allow sharing and collaborative editing of files stored on a web server. In Retrospect 9, WebDAV shares can be backed up or used to store backups.
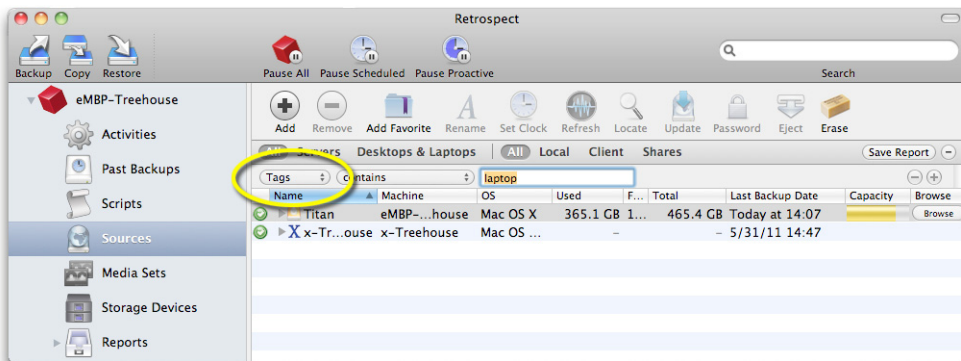
Searching for sources by tag

Keyword tags are even more powerful in Retrospect 9 with the addition of a Tags criteria in the Sources filter. Let's say all the portable computers in your organization have been given a "laptop" tag. The example below explains how to find them.
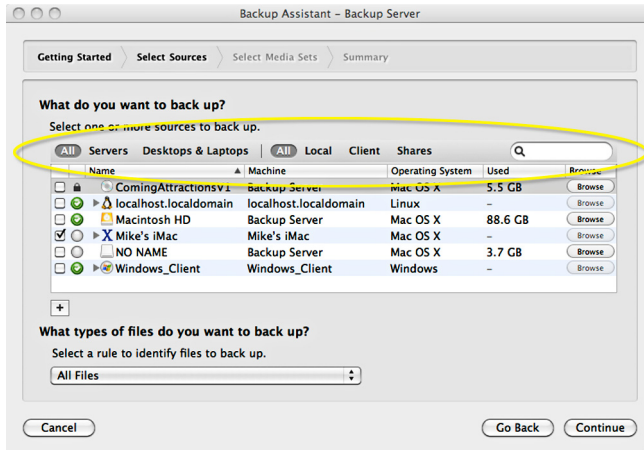
How to view sources with the tag "laptop":

1   Click **Sources** in the sidebar.

2   Click the plus (**+**) button next to the Save Report button to display the filter toolbar.

3   Click the left-most drop-down list and select **Tags**.

4   Select **Contains** from the next dropdown.

5   Type laptop into the text-entry field, and press the **Return** key.

All sources with the "laptop" tag are displayed.

Selection tools added to Backup, Copy, Restore assistants

All three assistants now include a scope bar and a search box that help you make selections more quickly. The tools are located directly over the results pane. The illustration below shows the scope bar on one of the Backup Assistant panels.

Filtering the contents of a past backup

While reviewing the contents of a past backup, you now have the option to view only the contents of the latest session. Double-click the name of a past backup to open the file list panel. To filter the list, select the **Show copied files only** check box.