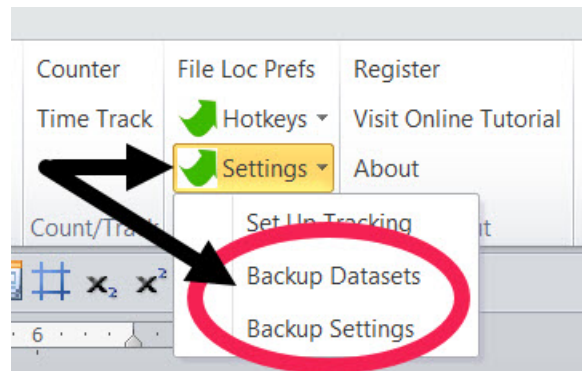


Backup (Dataset)

EditTools works primarily with datasets. The longer you use EditTools, the more datasets you will have and the larger the datasets will grow. Some users use a backup program faithfully, some do not. Whether you do or not, it never hurts to have another option for backing up datasets and your EditTools preferences/settings. The EditTools Backup is designed to provide backup of EditTools datasets and preferences/settings. Although it can be used to backup other files, such use is not recommended.

The Backup Function

The EditTools Backup is done automatically once you have set it up as you want it to work. To set up Backup, go to the Preferences menu and click Settings > Backup Settings as shown here:



Preferences > Settings > Backup Settings

The Backup Datasets shown above is used to manually backup datasets and to set what is to be backed up and to where it is to be backed up.

The Backup Settings Form

The Backup Settings form is shown below.

Backup Settings [X]

Use this form to automate backups of datasets
 NOTE: To manually run backup use "Backup Datasets" on the Settings Menu of the Preferences Ribbon Item

Run Dataset Backup:

When Word is **opened**: ← 1

☐ Always run

☐ Run on even numbered days only

☐ Run on odd numbered days only

Every days

Run only on selected days (max 3):

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

When Word is **closed**: ← 2

☐ Always run

☐ Run on even numbered days only

☐ Run on odd numbered days only

Every days

Run only on selected days (max 3): ← 3

☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday

☒ Thursday ☐ Friday ☒ Saturday

OK

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Backup Settings options

There are three primary options: to have the backup run when you first open Word (#1, above), to have it run when you exit (close) Word (#2, above), or to have it run both when Word is first opened and when it is closed (exited).

Within those primary options, there are several other options:

- **Always Run** means backup will run every time Word is opened or closed.
- **Run on Even Numbered Days Only** or **Odd Numbered Days Only** means backup will run only on those days (eg, 2nd, 4th, 6th, etc. numbered days of the month or 1st, 3rd, 5th, etc. numbered days of the month).

- **Every _ Days** lets you choose an interval. For example, if you enter 3, Backup will run every 3 days only.
- **Run on Only Selected Days (Max 3)** means that you can choose up to 3 specific days of the week for Backup to run and it will run only on the specified days.

In the above image, Backup will run only on Mondays, Thursdays, and Saturdays (#3, above) and only when Word is closed.

The Backup Datasets Form

Clicking Preferences > Settings > Backup Datasets (see first image above) opens the Backup Datasets form shown below. Using the Backup Settings form (above) sets the when-to-backup parameters; the Backup Datasets form sets what to backup and where to back it up.

Backup Datasets [X]

The first box on this form is to select the directory where the backup files should be placed. The default folder is listed, if a different one is required, browse for it on your system and select it. The top list box on this form lists all of the dataset directories that will be backed up when the macro runs. The list of extensions in the middle box are the file extensions (*.extension) that will be backed up. Both lists can be added to or removed from by using the Add button (to add) or double clicking in the box to remove an entry.

The refresh button will load the directories of the currently used datasets and the base EditTools extensions, respectively

Once all of the items to be ignored have been removed from the lists, click on OK. Use the Cancel button if nothing is to be done.

Automation: Use "Backup Settings" on the Settings Menu of the Preferences ribbon item

Folder to create backup folder in:

E:\EditTools Dataset & Preference Backup 4 Browse

Dataset directories to be backed up: Add Folder Refresh

C:\Users\user\My Documents\EditTools Datasets
 C:\Users\user\My Documents\EditTools Datasets\Client NSW files
 C:\Users\user\My Documents\EditTools Datasets\Client Specialty IQs piq
 C:\Users\user\My Documents\EditTools Datasets\Style Guides Specialty
 C:\Users\user\My Documents\EditTools Datasets\Client Cleanup Specialty datasets cfd dft
 C:\Users\user\My Documents\EditTools Datasets\Client Click Lists cld 5
 C:\Users\user\My Documents\EditTools Datasets\Client Code Inserter datasets cif
 C:\Users\user\My Documents\EditTools Datasets\Client Specialty Sequential F&R sfr
 C:\Users\user\My Documents\EditTools Datasets\Client Specialty Toggle datasets twd
 C:\Users\user\My Documents\EditTools Datasets\Client Style Inserter datasets sif
 C:\Users\user\My Documents\EditTools Datasets\Client Wildcard macros wfr wfs
 C:\Users\user\My Documents\EditTools Datasets\Journals datasets

Double-click to remove

Filenames to backup 6 Add Extension Refresh

*.ccd
 *.cfd
 *.cft
 *.cif
 *.cld
 *.dat
 *.dic

Double-click to remove

OK Cancel

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Backup Datasets form

First, choose a location to backup to (#4). It is suggested that you backup to a different drive than the one where your datasets currently are located. This way, if something goes wrong with a drive, you still have access to your datasets. Use the Browse button to locate where to backup.

Second, choose the folders to backup (#5). Use the Add Folder button to add a folder to the list. To remove a folder, double-click on the folder name and press the Delete key. Be sure to include all folders that contain datasets. During installation of EditTools, a default dataset folder was created: My Documents > EditTools Datasets (the full path is C://Users/user/My Documents/EditTools Datasets). If you chose to keep some or all of your datasets elsewhere, be sure you include those alternate locations.

Third, select the files to backup (#6). For the datasets, it is best to just list the extension (as shown, #6) rather than the full file name. Using the extension means any file, in any of the listed folders, that has the named extension will be backed up. Consequently, using *.nsw means any file with the .nsw extension will be included in the backup; In contrast, if you name the file, for example, ns_words.nsw, only ns_words.nsw will be backed up and not, for example, ns_org.nsw, ns_specialty.nsw, and ns_drugs.nsw. To remove an extension, double-click on the extension and press the Delete key.

Click OK to save your changes and start a backup session.

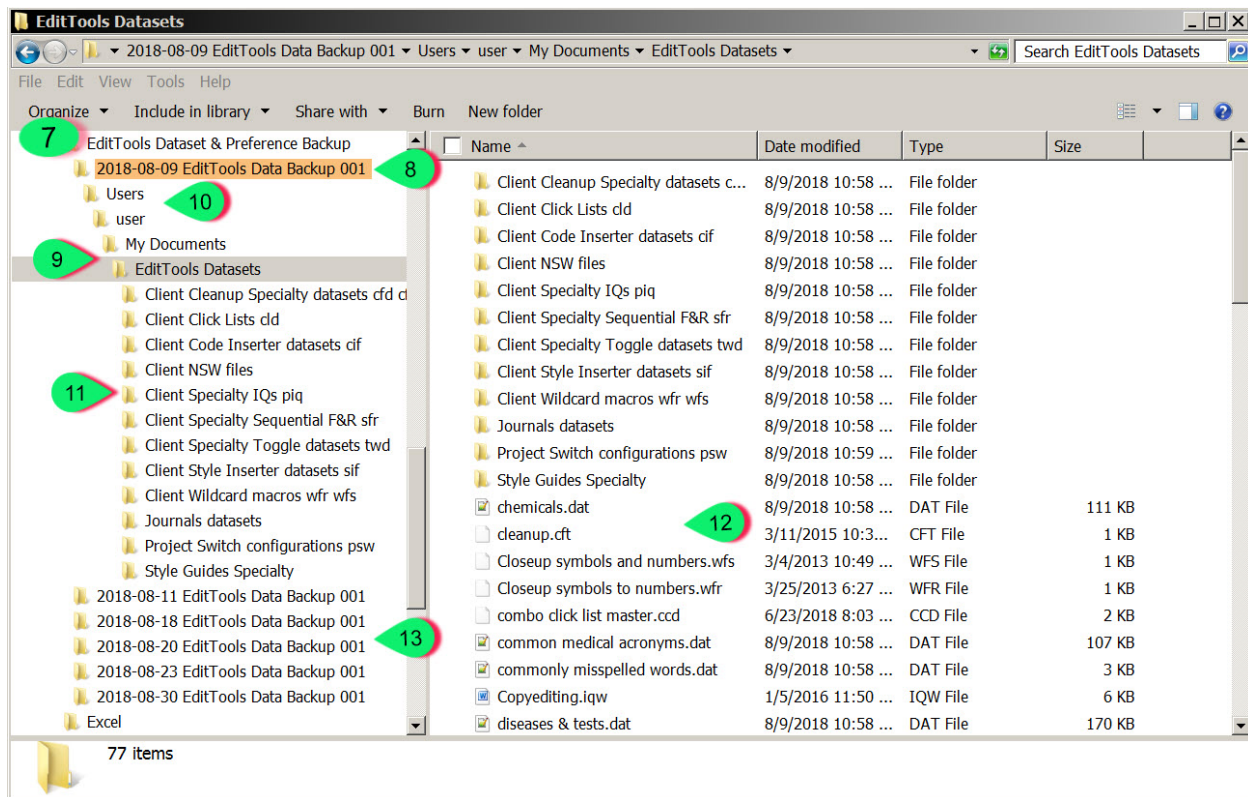
Backing Up Your Datasets

Whenever it is time to back up your datasets, the Backup Datasets form (shown above) appears. When it appears, you have the option of changing what is to be backed up and where the backup is to be saved.

To do a backup, click OK. If you do not want to do a scheduled backup, click Cancel.

What Gets Backed Up

When you first opened the Backup Dataset form, you designated a directory for the backups. EditTools does not create the parent directory; this is something you need to do **before** doing your first backup. You create the parent folder just as you would create any other folder: open Windows Explorer (see figure below), and click File > New > Folder. In the image below, the parent folder is named *EditTools Dataset & Preference Backup* (#7); you can give it any name you wish. It is the folder selected in the Backup Dataset form (see #4 above).



Expanded view of a backup

When a dataset backup is run, a new subfolder is created. Each dataset backup is its own subfolder and is automatically dated (year-month-date), named (“EditTools Data Backup”), and numbered (“001”) (#8, highlighted). The number (“001”) indicates it is the first backup performed on the indicated date (“2018-08-09”); if a second backup was performed on the same date, the number for that second backup would be 002.

Tip

If you find that you are adding a lot of data to one or more datasets while working, consider doing multiple backups. The backups are quick and can be lifesavers should your primary dataset become corrupted or some other tragedy strike while you are working.

In the above image, you can see that the datasets are maintained in the original folder created by EditTools during installation, namely, My Documents > EditTools Datasets (#9). The full path is C://Users/user/My Documents/EditTools Datasets, and it is that full path that forms the backup subfolder (#8), not just the EditTools Datasets subfolder.

In addition, there are subfolders that contain datasets within the EditTools Dataset subfolder, such as “Click Lists cld” and “Client NSW files” (#11), as well as datasets such as “chemicals.dat” and “Closeup symbols and numbers.wfs” (#12). As you can see, the backup

folder, “2018-08-09 EditTools Data Backup 001” mirrors the content and organization of the original EditTools Datasets folder.

Each of the backups (#13) shown mirrors the expanded backup (#8), except that they include any dataset changes that were made subsequent to the creation of the expanded backup.

Restoring a Dataset (or All Datasets)

Restoring a dataset is a manual drag-and-drop task that is done like any other moving of files from one folder to another folder.

Tip

Do not MOVE dataset(s) from the backup to the original location. Instead, COPY the dataset(s). If you copy (instead of move) the dataset(s) and something goes wrong, there will still be a copy available.

Tip

The easiest way to copy the dataset(s) is to have two instances of Windows Explorer open, stacked or side-by-side, so you can grab the dataset(s) to be restored, right-click to drag the dataset(s) to the restore location, and drop the dataset. You will then be asked whether to move or copy the file; choose copy.

If you need to restore all of your datasets and they are all located in a single folder like EditTools Datasets (#9, above), even if there are multiple subfolders under that parent folder (as is the case in the above image; see #11), right-click on the parent folder (EditTools Datasets in this example) and click on Copy. Go to the restore location and click Paste. That will restore the parent folder and its contents.

Tip

Before copying and pasting the parent folder and all the datasets it contains, rename the existing parent folder at the restore location. You should do this so that you do not overwrite the existing datasets in case your backup copy is missing a recently created dataset. Once you are certain all of the datasets are in the restored parent folder, you can delete the renamed folder and its contents.