

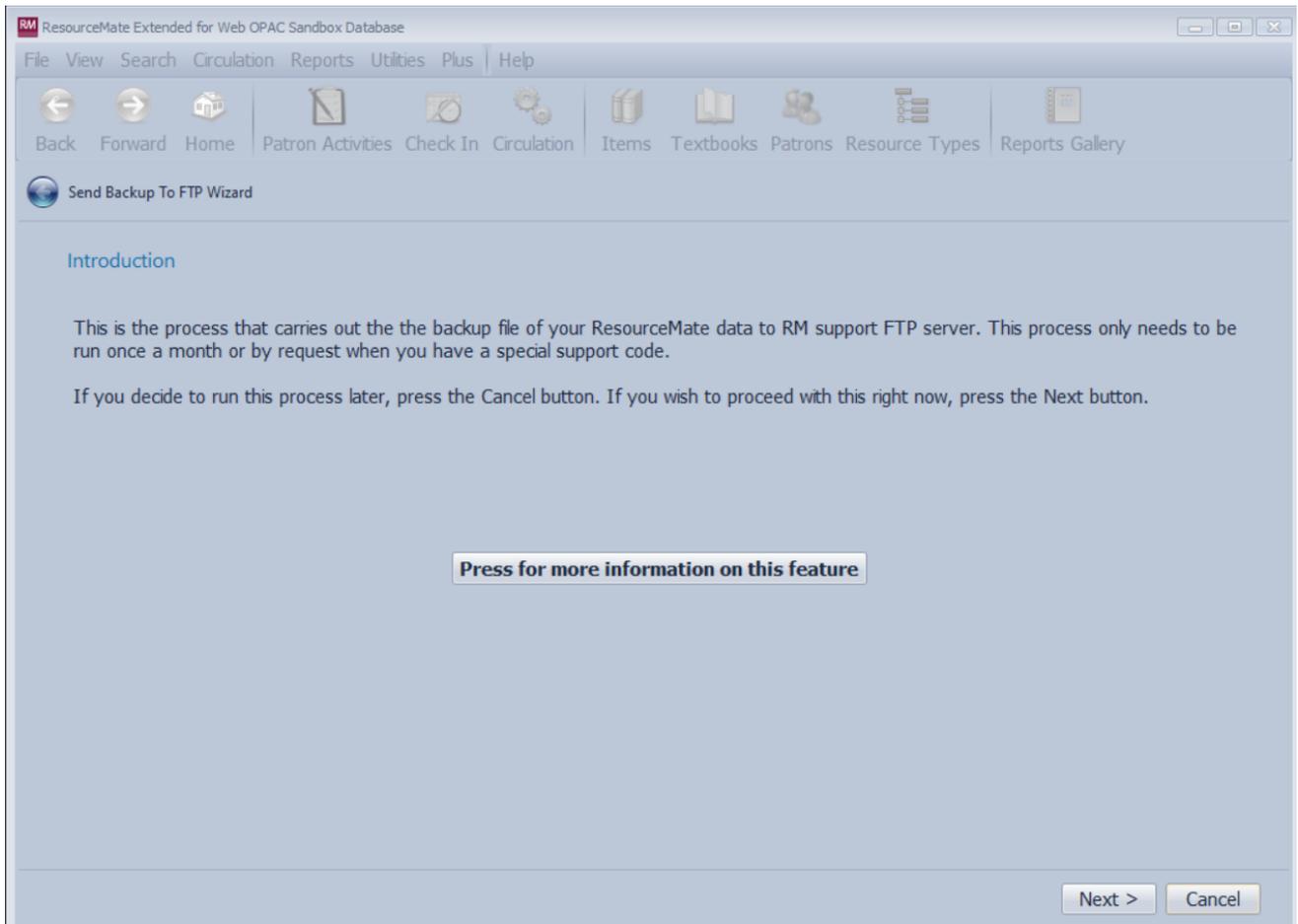
Using the ResourceMate Offsite Backup

Those of our customers who maintain a valid support agreement with ResourceMate are entitled to use our Offsite Backup Service on a periodic basis. This service gives those customers the opportunity to upload a backup file to a ResourceMate server. These backup files are created by the built-in ResourceMate “File > Backup” program. Customers may use this service on a rotating thirty day basis. Currently it is up to you to diarize when the next upload will be permitted. Both the creation of the backup file and uploading it it will remain manual processes that you must initiate from within ResourceMate. If you wish to automate a monthly offsite backup such that it doesn’t require manual intervention, please consider purchasing our [Auto Backup & Offsite Storage](#) program. Contact info@resourcemate.com for more information about this add-on.

Note that the Offsite Backup service is also to be used in the event that ResourceMate Support might request a backup for in-house evaluation or troubleshooting.

This latest iteration of the offsite storage capability involves the use of a new utility program that is available on the drop-down “File” menu from within ResourceMate itself. To use it, select the “File > Send Backup File to FTP...” menu option.

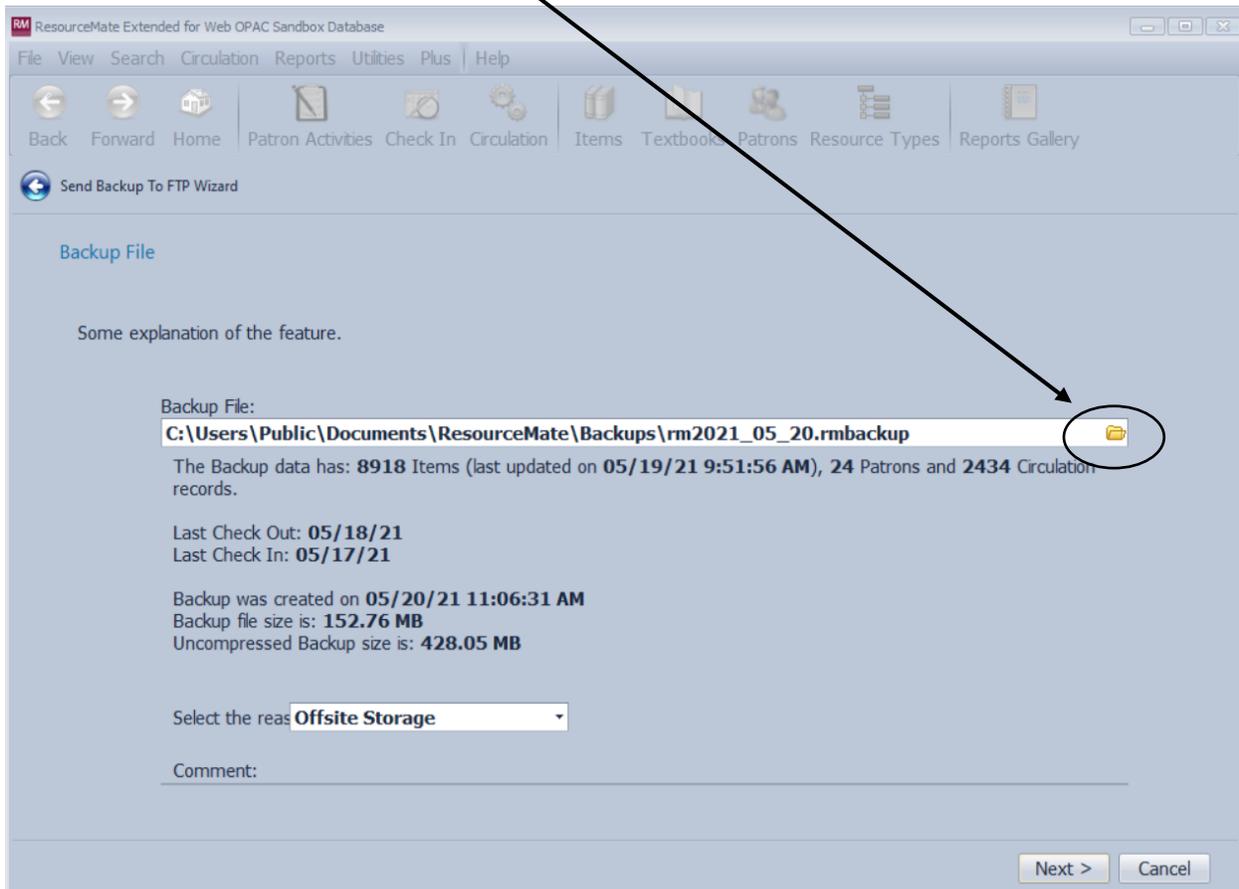
An initial description will greet you on the resulting form – you can click on the “Press for more information on this feature” button in the middle of the form to be directed to this article online. Otherwise, you just need to click on “Next” if you want to proceed, or “Cancel” if you don’t.



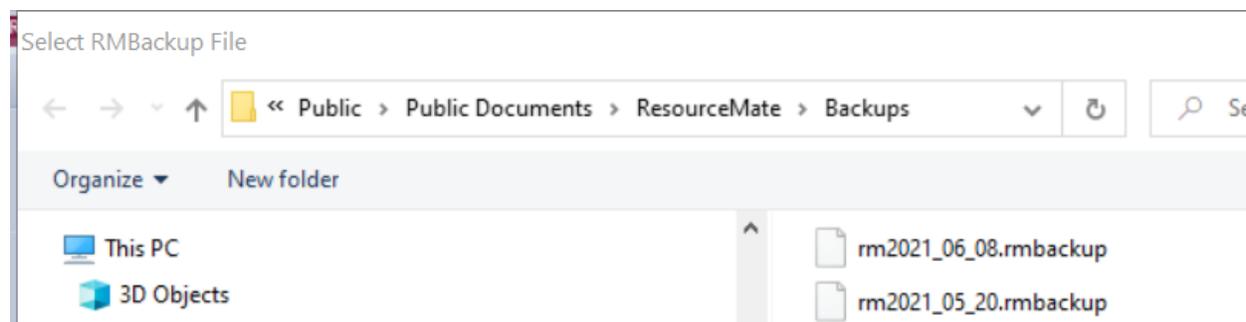
On the form that appears when you click on “Next”, you’re presented with an input field. Effectively, you’re being asked by the program to supply the Windows path and name of the ResourceMate backup file that you want to upload.

By default, ResourceMate will present you with the latest file it can find in the last destination that you wrote a backup file to.

To select a different backup file that the one presented by default, you just need to click on the small icon resembling an open manila file folder on the “Backup File:” field.



You can use the resulting “Select RMBBackup File” form to direct the program to the path and file name of any valid ResourceMate backup file:



Select the most recent backup file available and click on the “Open” button in the lower right-hand corner of the “Select Backup” form. The file name contains the date it was created, making it straightforward to identify the most recent file.

Note that ResourceMate backup files ALWAYS end in one of two suffixes – either ‘.rmbbackup’, or ‘.rmcebackup’. No other filenames can be selected.

This will place the file path and file name back into the “Backup File:” field on the form.

Information pulled from the backup file will appear below the “Backup File:” field, including:

- The number of items in the backup file’s Items table;
- The date and time the database was last updated [allowing you to confirm that you’ve selected a recent backup file];
- The number of patrons included in the backup;
- The number of circulation records included in the backup;
- The last date items were checked out and checked in;
- The date and time the backup file was created;
- The size of the backup file [useful to be able to gauge the amount of time the upload to our servers will require];
- The size of the uncompressed database.

You will be asked to select a reason for the upload. There are two currently supported:

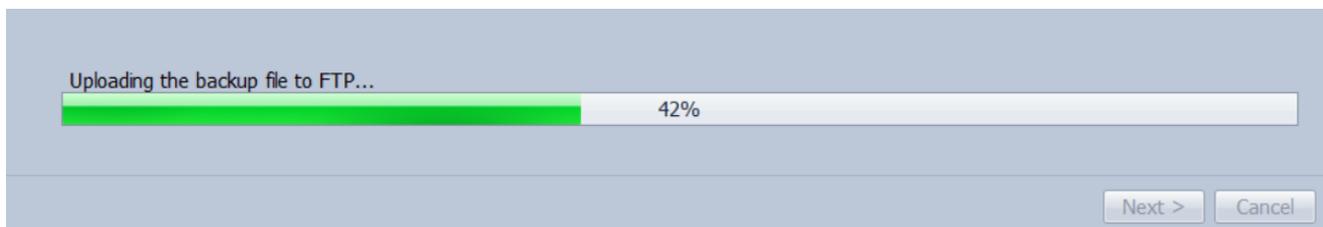
- Offsite Storage
- Support

Note that if you have been asked by ResourceMate Support for a copy of the backup to assist with analysis or problem-solving efforts, you should choose the latter option in the “Select the reason:” drop-down.

Add any comment that you feel might be applicable in the “Comments:” field. If you are sending us a backup file for support reasons, please include the ResourceMate Support Ticket Number for cross-reference if you know it. Feel free to add any supporting information or descriptions in this same “Comments:” field.

Finally, click on the “Next” button in the lower right hand corner of the “Backup File” form and if you are ready, click on the final “Start transferring the backup file to FTP” button appearing in the mid-lower portion of the “Ready to start transferring” form.

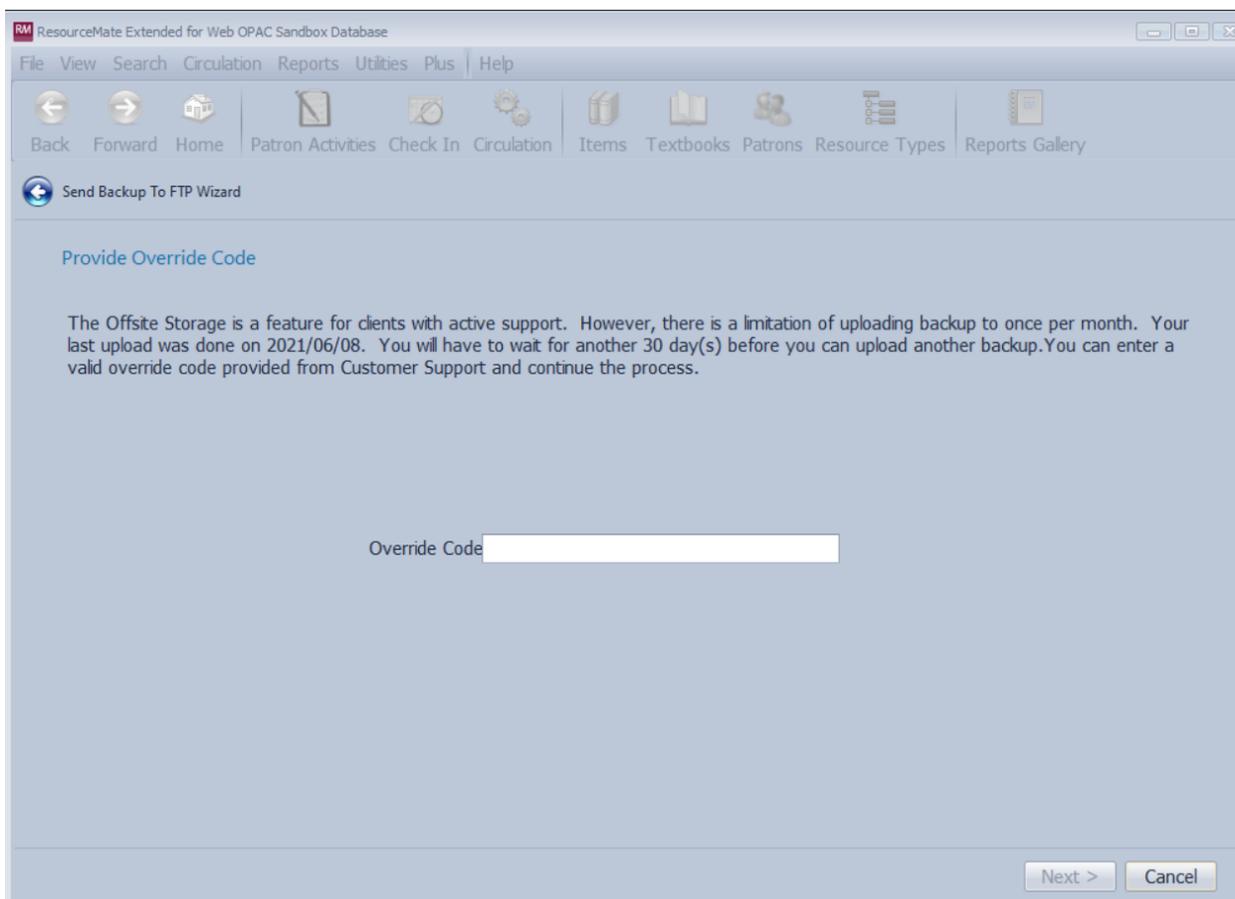
A brief paragraph will appear that explains the amount of time required to complete the upload, along with a progress indicator to allow you to monitor the progress of the upload:



When the upload has completed, you will receive a “Congratulations!” message the option to Finish in the lower right hand corner of the “Finish” form.



Should ResourceMate Support request a backup from you for internal diagnostic purposes, and if that request falls within the thirty day interval, an “Override Code:” input field will appear in the middle of the “Provide Override Code” form:



The screenshot shows a web browser window titled "ResourceMate Extended for Web OPAC Sandbox Database". The interface includes a menu bar with "File", "View", "Search", "Circulation", "Reports", "Utilities", "Plus", and "Help". Below the menu is a toolbar with icons for "Back", "Forward", "Home", "Patron Activities", "Check In", "Circulation", "Items", "Textbooks", "Patrons", "Resource Types", and "Reports Gallery". A "Send Backup To FTP Wizard" button is visible. The main content area is titled "Provide Override Code" and contains the following text: "The Offsite Storage is a feature for clients with active support. However, there is a limitation of uploading backup to once per month. Your last upload was done on 2021/06/08. You will have to wait for another 30 day(s) before you can upload another backup. You can enter a valid override code provided from Customer Support and continue the process." Below this text is an input field labeled "Override Code". At the bottom right, there are "Next >" and "Cancel" buttons.

ResourceMate Support personnel will provide you with the required code. Enter it and click on “Next”, and the process will present you with the “Backup File” selection form, as seen in an above-referenced facsimile. If the code cannot be validated, the “Next” button in the lower right-hand corner of this form will remain inaccessible.

Please note that due to storage limitations at our end, this service is NOT meant to serve as an archive. ResourceMate will only retain the last three backup file uploads so that we can provide some level of data redundancy for you. In the event that your most recent upload should prove to be corrupt, there will be two older files to fall back on in order to provide you with the most recent working data set available.

Please note that the Offsite Backup process is NOT a substitute for a working disaster recovery plan that would see you having access to a LOCAL backup file in the event of a data catastrophe at your end. Please note the following suggestions from ResourceMate Support:

- Please do NOT store your backups on your local hard drive! Instead, copy them to removable media, such as a flash drive, or to any of the several cloud-based storage solutions available to you [One Drive, Dropbox, iCloud, Google Drive, etc.];
- Please manage the accumulation of these files; there should be no need to retain more than a half dozen or so backup files locally, unless you want to attempt to institute a real archiving solution for the purposes of historical review of the disposition of your library's collection;
- Please set ResourceMate to warn you when it closes that you haven't done a backup in *N* days, where *N* is a valid interval entered into the "Utilities > Preferences > General" form in ResourceMate itself.

Remember that you might end up with a backup file from Offsite Storage that's potentially thirty days old; *nothing* is a better alternative than a proper local backup regimen that sees your valuable data stored away from your computer and its primary hard drive, and is immediately accessible in case of data catastrophe. We offer the Offsite Backup service in the rationale that something, even if old, is better than nothing, but best is access to a recent backup file should you ever need to recover from a catastrophic failure of any kind.