

Backup Survey Rubric and Simple Backup Audit



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Despite what you think....

YOU'RE NOT BACKED UP!

When some people think of technology, they think of something that is beyond their ability to understand. I don't think that is fair. Most business people have above-average intelligence, regularly make important decisions, and are very familiar with the concept of risk. When we encounter risks in our business or personal lives, we generally look for insurance. A backup is insurance against the risk that something will happen to your computer and cause it to lose all your important files.



Backups can be complicated. The increasing size of the files people store, the sophisticated strategies for keeping multiple generations of files and powerful software make this subject ill-suited to amateurs. But, regardless of your "geek" rating, there is a simple test you can conduct to see if your backup system is working. It all begins with the question associated most closely with the people from Missouri: "Show me." But first, you need to know **WHAT** to backup.

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Ask yourself these questions:

Was I able to recover the file successfully?

If not, you failed the audit. The consequences could be serious. Fix what was broken and repeat the test.

Did I need help?

Needing help is OK. But remember: if this had been a *real* emergency, would that person be available? Consider the problem created if the backup media was stored offsite—at an employee's home or a bank vault.

Could anyone in the office recover the file?

Your backup might be the easiest way for someone in your office to steal your data.

How long did it take?

Recovering files from backup can take a long time. Be aware of this and factor in recovery time to the procedures you would follow if recovering data from a backup becomes necessary.

This simplified backup audit answers an important question: “Is my stuff getting backed up?” Our experience is that *most* people are over-confident in their computer. Like children, they underestimate the risk of bad things happening. As adults, we know insurance is the only way to protect important assets. Like insurance, you’ve got to buy it *before* you need it!



Backup Survey Rubric

Teachers use rubrics to instruct students. Here, I assume you are a student of backup. I propose you go to every desktop and conduct this simple survey to identify what applications and data your business depends on.

Ask: ➡ What programs do you use?

Have the user point to the icons they click on or the programs they select. This should include word processing programs, e-mail programs, databases, accounting and other custom applications. If you notice icons or programs that weren't on the list, ask “What are these?” Sometimes people simply forget which programs they use.

Ask: ➡ Where does that program store its data?

Ask the user to demonstrate using the programs, opening or closing a file, database, etc. Most programs store and retrieve files. The trick is to make sure the user knows where that is, or to confirm that systems are in place to locate the data in a place where it can get backed up.

Ask: ➡ When/Where does that data get backed up?

Every user should be aware of how their “stuff” is backed up. They should know if it was last night or last week.

Ask: ➡ If you discovered missing or corrupted data, what should you do?

Every user should be aware of the recovery plan: who to ask, how long it will take, and what is available. They should know if there is only *one* copy from last night, ten copies from the last two weeks, or an archive copy in the vault at the bank from last quarter.

In a small business, sharing the details about the “Backup Plan” will help to prevent an oversight and potential calamity. Everyone can’t be in charge of the backup, but if something breaks, everyone is going to care if it worked!

A Simple Backup Audit

Speaking of making sure the backup worked, here is a simple backup audit to test if it works. Your situation may call for a considerably more complex audit. If you pass this test, you can move on to more sophisticated tests with the help of your IT consultant.

STEP ① Create a “test” file and store it along with your other documents. That may be in “My Documents” or in some other folder on your PC or server. This file might only have one line in it; a quote like: “here today, gone tomorrow” is appropriate. You can also try adding a contact to your address book, login and password to a website, or sending yourself an e-mail message.

STEP ② Tomorrow, delete the file, contact or e-mail message. (This step adds drama.)

STEP ③ Attempt to recover the file from your backup. PLEASE make sure you know what you are doing—you don’t want to conduct this test if you are not familiar with your backup software. Recovering too much can be a disaster! If you need to ask someone else for help, let him or her know it is a test. Be patient, but be persistent.

