

Tri-BACKUP 6

Programmed Actions

Editor Guide

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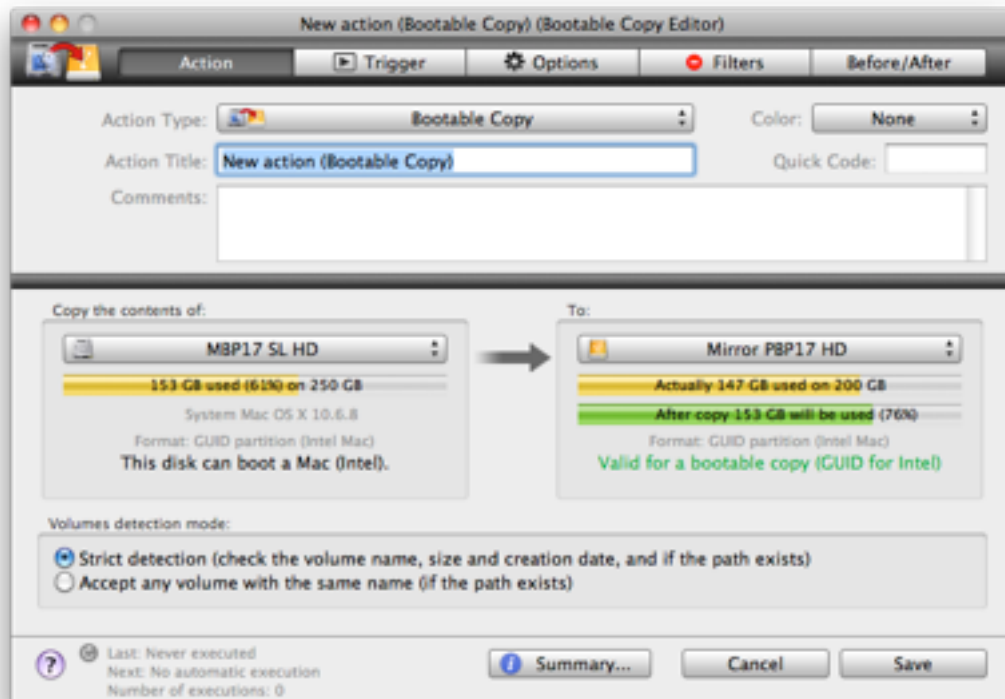
Introduction

Settings of Programmed Actions (and Immediate Actions) are edited in a window. One window is opened for each action that is edited.

The edit window has always the same organization in different panels, accessed by clicking the top bar.

A summary of the use and settings of execution is displayed in the bottom right of the window.

A text summary of the settings is displayed by the button "Summary ...».



The various panels of the editor

An editing window is open, with adjustments depending on the type of action. The window has several panels:

Action: To set the type of action, the title and the quick code you want for this action (for easy retrieval in the list) and the basic settings (source and destination, for example).

Trigger: This panel allows you to define the conditions of automatic execution of the action (at a given time or after specific events, such as mounting a disk - to execute a backup on this disk - or when you leave a application - to copy or back up data, for example). You can set various trigger conditions (eg every week, and also if you connect the backup disk).

Options: This panel is specific to each type of action. You will find such conditions for copying, using compression, permission to delete files, etc..

Filters: Filters are used to exclude certain items (eg not to copy temporary data and unnecessary files) to lighten the copy or treatment, or not to touch certain files or folders. A button allows you to test the filters you have added to check their effect on the action.

Before / After: In this panel, you can define conditional operations to be performed before or after the execution of the action. This may be sending a message in case of error, the execution of a script, to exit an application before the execution of the action, the execution of another programmed action, etc.

Summary of settings

The **Summary** button at the bottom of the window displays a text summarizing all settings of the action. You can use it to check your settings or compare two actions, but also to copy this text and send the settings to our technical support if needed.

Save Changes

When the settings suit your needs, click the "**Save**" button.

If you wish to cancel changes and return to the previous settings, click "**Cancel**".

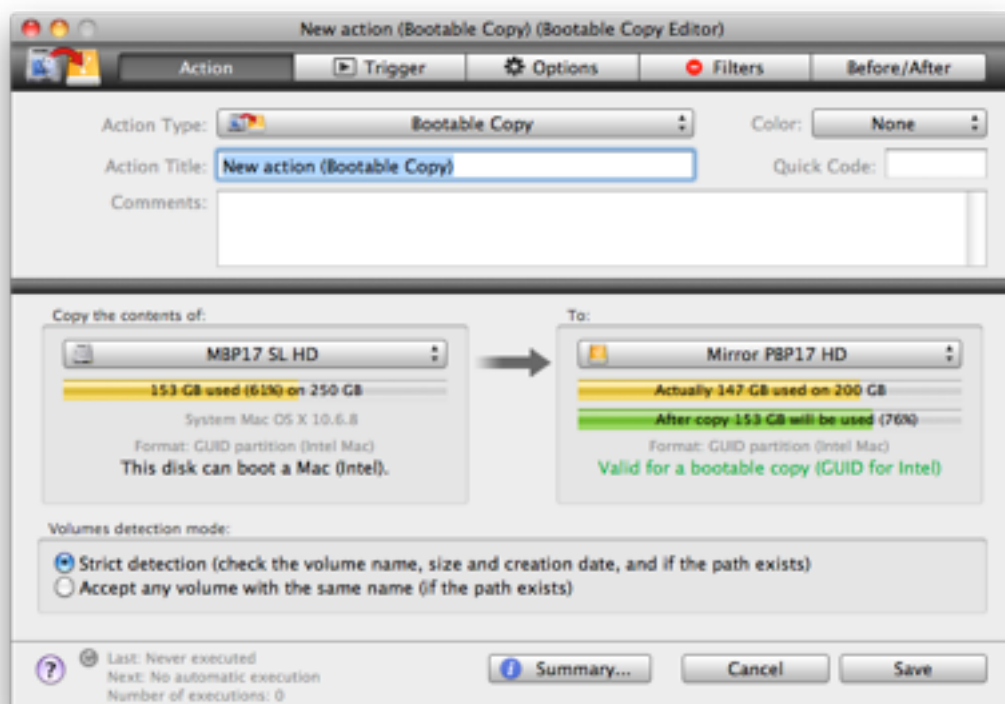
Action

The first panel lets you change the **type of action** and the **title** that you wish to display (it makes sense to customize the title of each of your actions in order to more easily identify them when you need to modify them or execute them).

The **Quick Code** can be used for manual quick launch of the action, particularly from the Scheduler. See the chapter about **Tri-BACKUP 6 Scheduler** in the manual **Tri-BACKUP 6 (QuickStart Guide)**.

You can assign a **color** to display the action (always with the aim of identifying more easily).

A **comment box** is available. These comments are not used during the execution of the action, but you can use it as a reminder, to inform another user, summarize what the action is, or specify the terms of use.



The lower part of the panel action depends on the type of action chosen.

For most actions, it shows the source and destination folders or disks.

Disk (bootable copy)

A popup menu lets you choose among the currently mounted disks, the source (left) and the destination where the copy will be done (right). The area under the menu tells you the size and variety of information on the selected disk, especially if the source disk contains a system and if the destination format is compatible to make a bootable disk.

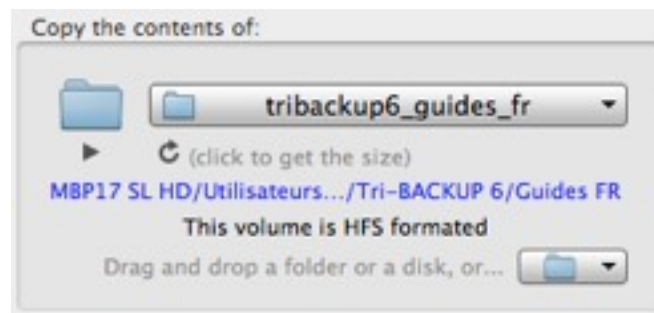
Note: The information «size after copy» of the destination disk is given for the case where additional data already present on this disk (and not in the source disk) will be removed (you can change this behavior in the Options panel).

Folders or drives (other actions)

If you choose a type of action different from the bootable copy (and Alert), one or two areas for selecting a folder or a disk are shown.

You can choose a folder (or disk):

- **Drag and drop** that folder from the Finder onto the area.
- With the "+" green button if no choice has already been done.
- With the **popup menu at the bottom right**, by selecting one of the newly defined items or Choose ... that opens the selection dialog.
- With the **popup menu displaying the current folder** showing the hierarchical path, to choose one of its parent folders.



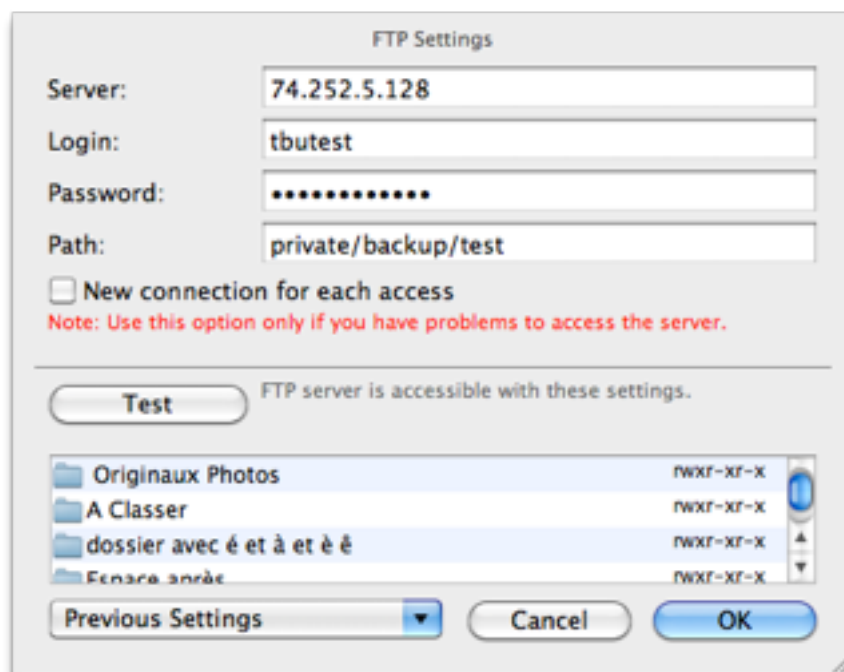
The small triangle under the folder icon displays the folder in the Finder.

The rotating arrow starts a calculation of the current size of the file.

FTP server

For actions where the source or destination is an FTP server, the area shows the server.

You can edit the server information by clicking the edit button in the area (or "+" green button if no choice has yet been done).



Note: In the editor of the FTP server, a "Test" button allows you to verify that your settings are correct to access the server (the server content is displayed in the list).

Detection mode of the volumes

You can choose between two methods of detecting the volumes:

- **strict detection** of a volume (if two disks of the same name should not be confused). The strict detection checks information of the disk (name, size and creation date of the disk) to differentiate two discs that have the

same name. This is usually the option to choose to avoid confusion between two discs (**but it is highly advised to give distinct names to each of your disks**).

- **tolerant detection**: This mode only checks the name of the disk. This mode can be selected, for example, if you use two alternating backup disks of the same name for the same action (one for the even days, one for odd days).

Important: Any initialization, repair or reformatting of a drive can change its size and creation date. In this case, if you use strict detection, you must redefine the items (source and destination) of the actions using this disk.

Automatic mounting of volumes

Tri-BACKUP can automatically mount remote volumes needed to perform an action.

Note: If Tri-BACKUP mounts a volume, it will unmount it after the action.

To do this, put an alias of the remote disk, **with as name exactly the volume's name (without additional extension)** in ~/Library/Application Support/Tri-BACKUP 6/Alias/.

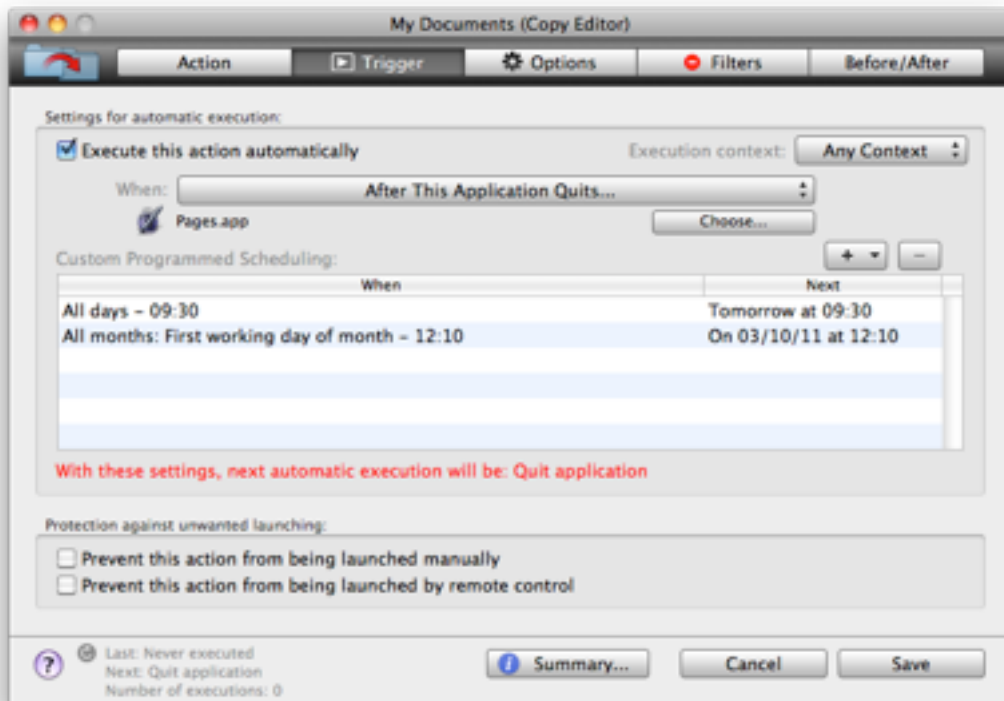
Note: To save the volume password, unmount the remote disk, then double-click the alias and select "Save password in keychain". Thus, the password will not be asked when Tri-BACKUP mount this volume.

If an action needs this disk (and if it is not mounted), Tri-BACKUP searches in the Alias folder for an alias of that name and, if so, uses it to mount the disk automatically .

Trigger

A programmed action can be launched manually at any time.

Tri-BACKUP offers controls for your actions can run automatically without your intervention to secure your data without having to worry about.



You can define one or more scheduling, but also executions triggered by events (for example, to execute a backup when a drive is connected, or save documents when you have finished and quit a particular application).

Predefined triggers are accessible through the menu "**When**" and "+" button allows you to add periodic triggers (daily, weekly, monthly, etc.)..

The checkbox "**Execute this action automatically**" allows you to enable or disable the automatic execution of the action.

The options at the bottom of the window allow you to lock the manual launch or the remote launch of the action.

Options

The options are specific to each type of action.

There are however options common to several types of actions:



- **Execute with the current user / Administrator permissions:** With Administrator mode, the entire disk is available, including the System and the accounts of other users. With the permissions of the current user, other accounts may not be copied nor the System.

Note: We usually use the "current user" mode unless if you want to copy the data to all users. Administrator mode is automatically activated if you chose a "Bootable Copy" action.

- **Copy owner and permissions:** Every file and folder has an owner and permissions. You can choose to copy these attributes (in this case, you must set the Execute with Administrator option), or conversely to have the default attributes (the copy will have the current user as owner).
- **Compression:** You can chose to have every file saved or copied as compressed (which reduces the size of the backup) and possibly encrypted with a password (the recovery of each file can only be done if you have the password wich was used to encrypt the file).

Note: Compression and encryption routines are proprietary. Tri-BACKUP is necessary to restore the original file.

- **Delete:** If the folder (or disk) destination already contains items that are not in the source folder (or disk), you can delete them or not. Delete gives an identical copy of the original, but any error made on the original will be reproduced in the destination.

Note: For Bootable Copy actions, you can choose not to delete the folders already present on the root of the disk (eg if the destination disk already contains data that you do not want to delete during the creation of a bootable copy).

- **Replace newer files:** Normally, recent files replace the old files, but it may be useful to replace a file by an older version (eg if in the original file is reverted to an earlier version of a document). This option authorize the replacement.

Other options

For Evolutive Backups, there are specific options for the keep life of data (given that the latest version of each file is always preserved).

Specific settings for Evolutive Backup:

- ☐ Make Evolutive Data visible
- ☒ Remove older versions after: Days
- ☐ Retain a maximum of: Versions

For Incremental Backups, you can set after how long - or how many executions - backups are deleted.

Specific settings for Incremental Backup:

- ☐ Partition the Backup in folders with a maximum size of: MB
- ☐ Remove previous backups after: Days

For Synchronization, the action normally copy the recent files and files that are missing. You can change the behavior of this action:

Specific settings for Synchronization:

- ☒ Copy missing files in both directions
- ☐ Copy missing files from left folder to right folder only
- ☐ Do not copy missing files (update existing files only)

Synchronization replaces older version of each file by the newer version.
If a file is only in one folder (and missing in the other), you can choose to copy it or not in the other folder.

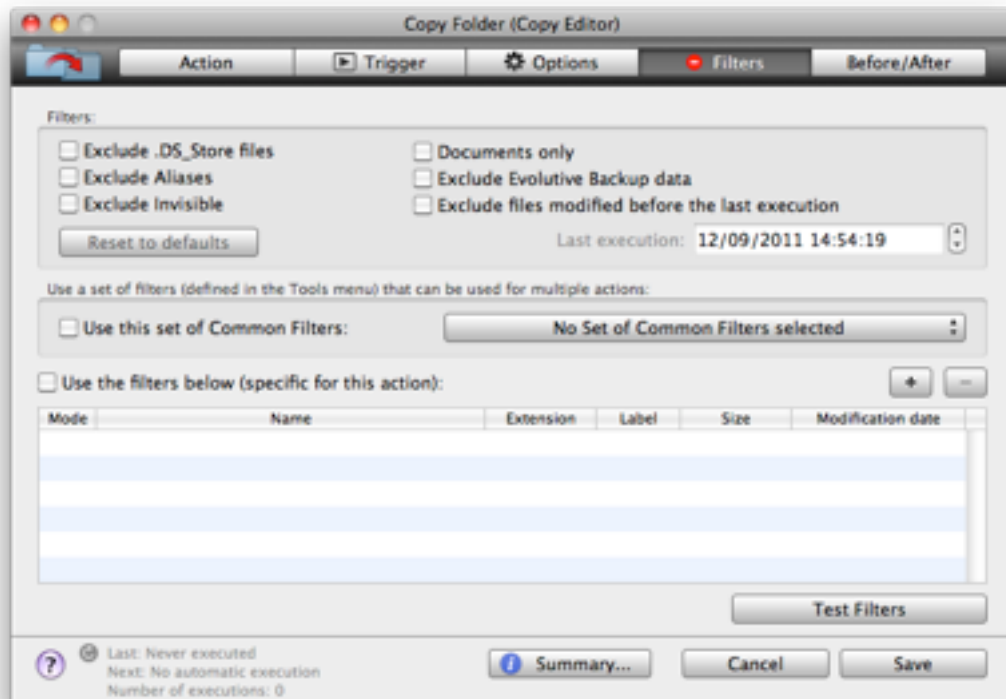
Filters

The filters are used to exclude certain items of a copy or a backup.

There are a number of predefined filters, such as. DS_Store (which contain the settings for each file format), aliases or invisible items.

You can also create an exclusion list of files or folders based on their name, size, etc.

Note: The items excluded are ignored: they are copied or deleted.



To add an item in the list of filters, you can:

- **Drag and drop** a folder or file on the list: It will automatically be taken as a reference for the filter.
- **Click the "+" button**: The filter editor will open.
- **Drag and drop a filter** for the edit window of another action (or from the window of the common filter).

To edit an existing filter, double-click the filter in the list.

You can add as many filters as necessary. The execution of the action will only process files and folders that are not excluded by a filter.

The **"Test filter"** button will display a window showing for each item in the folder (or disk) source, whether it is excluded by filters or not.

Common filters

With Tri-BACKUP, you can create sets of filters that you can use for various actions. Changing a set of filters modifies all the actions to which it applies.

The edition of the common filters is located in the menu (or panel) Tools.

Filter Editor

The edit dialog displays various filter options:

Filter Mode:

☒ Exclude matching items
☐ Include only matching items

Type of items:

☐ All (Files and Folders)
☐ Files
☒ Folders, Bundles, Packages...

Items with a path, a name, an extension or a label matching:

☒ The access path is

☐ The extension is one of these:

☐ The label is:

Files with a size or a modification date matching:

☐ The size is smaller than...

☐ The modification date is older than...

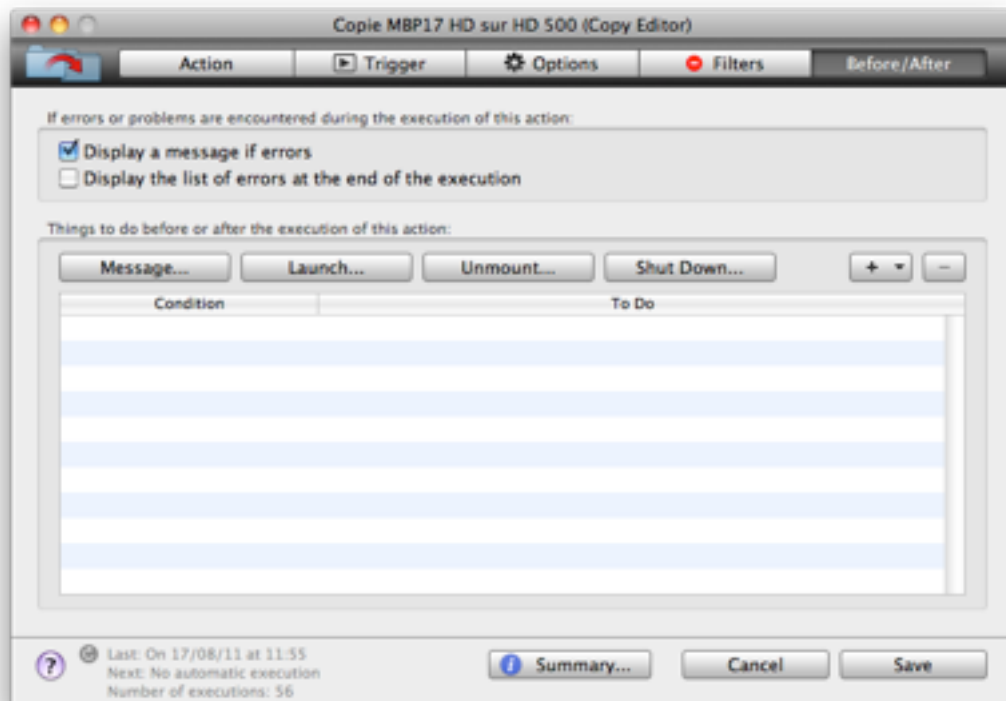
- **Filter Mode:** A filter can be used to exclude certain items (eg exclude all files that are larger than 10 MB) or instead to include only some items (eg copy only files with the extension "jpeg").
- **Type of items:** You can choose a filter applying only to folders or files.
- **Name and extension:** Here you specify the criteria for detection of items involved in the filter.
- **Criteria on files:** You specify the criteria in the area to filter depending on the size and modification date.

Note: The criteria of size and date do not apply to folders.

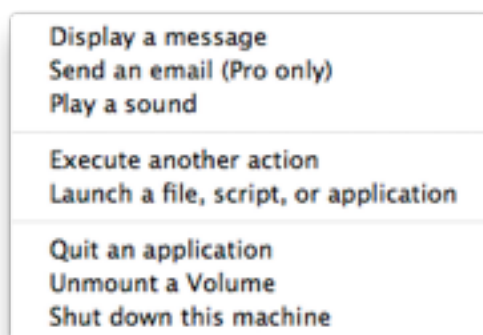
The button "Choose Example" takes a file or folder as an example, and copies the information of name, extension, size and date of the example.

Before / After

You can perform conditional operations before or after the execution of the action, such as sending a message in case of errors, launching another action if this action was successful, remove a disk or launch a script or application after the action.



The "+" button displays a menu to select the operation to perform.



In the editor, you can choose from the popup menu the condition for the operation to be performed: before or after the execution, in case of error or when copying files, etc.