



PERFECTCOPY™ USER MANUAL

SEPTEMBER 2001

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PerfectCOPY 1.54

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TABLE OF CONTENTS

Introduction and Setup

PREFACE	1
How to Use This Manual	i
INTRODUCTION	1
Product Features	1
System Requirements	2
Registering Your Product	2
Support Services	2
Installing PerfectCOPY	2

Using PerfectCOPY

GETTING STARTED	3
Shares and Permissions	3
Opening PerfectCOPY	4
Program Interface	5
Window Tabs	6
Backup Tab	7
Settings Tab	8
Recover Tab	9
About Tab	10
Closing PerfectCOPY	11
Exiting PerfectCOPY	11
BACKING UP YOUR DATA	12
Selecting Files for Backup	13
Configuring Your Backup Settings	14
Selecting a Backup Destination	14
Specifying the Backup Settings	16
Instantly Back Up Files	17

Verifying Your Backup	19
Recovering Files From the Essential Server NAS+	20
GETTING HELP	22
Program Help Files	23
User Manual	24
List of Illustrations	25
Index	26



PREFACE

How to Use This Manual

This manual is organized into two parts:

- **Introduction and Setup** describes PerfectCOPY features and installation instructions.
- **Using PerfectCOPY** provides detailed instructions for using PerfectCOPY features.

The following conventions have been used:

select	choose an option from a menu or list of objects (i.e., files, devices or menu option). Point the cursor at the item and click the left mouse button, once to highlight and again to select.
click	perform an operation using an object in the window (i.e., a window button, menu item or icon). Point the cursor at the item and click the left mouse button, once to highlight and again to select.
double click	perform an operation using an object in the window (i.e., a program icon or folder). Point the cursor at the item and click the left mouse button twice rapidly.
press	perform an operation using the keyboard (i.e., Delete key, Ctrl key or Alt key).
type	type the required information using the keyboard (typically used to add information in a window or field).



INTRODUCTION

PerfectCOPY allows you to quickly and effortlessly make backup copies of your important data. Used in conjunction with Essential Server NAS+, PerfectCOPY runs on Windows workstations and provides users with a way to copy data from their local machines to their share on the ES NAS+, where their data is further copied to a backup tape.

PerfectCOPY is part of the Essential Server disaster recovery strategy created by Merlin Software Technologies International, Inc. to ensure that your data is safe, secure, and always available.

1.1 Product Features

PerfectCOPY was designed to allow Windows workstation users to copy data from their local computer to the Essential Server NAS+ quickly and effortlessly.

- **Quick and Easy Installation** — PerfectCOPY can be installed with a few clicks of the mouse.
- **Graphic User Interface (GUI)** — User-friendly screens allow you to begin using PerfectCOPY quickly and easily, minimizing the learning curve and user error.
- **Convenient Features** — PerfectCOPY includes time-saving features such as the Backup Setting option, which allows you to set a time interval for automatic backup of specified files and an online help system, making PerfectCOPY a program for everyone, including first-time users.
- **Easy-to-Use File Selection Methods** — The **Backup** and **Recover** tabs allow you to quickly browse and select files for backup and recover operations.

1.2 System Requirements

Minimum hardware requirements for PerfectCOPY:

- **Operating System and environment** — Windows 95/98/ME or Windows NT/2000 making use of Microsoft Networking capabilities.
- **Hardware** — Intel-based computer, with a minimum of 32MB of RAM (64MB RAM recommended) and 300KB of available hard disk space.

1.3 Registering Your Product

Registering your ES NAS+ helps your Value Added Reseller (VAR) or MERLIN to provide support services and to inform you about new software developments.

- Visit the Essential Server website any time after you purchase ES NAS+ to electronically enter your registration information. The URL is:

<http://www.essentialserver.com/register>

1.4 Support Services

This manual provides comprehensive information on how to use PerfectCOPY, including initial setup instructions. If you do not find the answer to your problem, check the FAQ (frequently asked questions) at www.merlinsofttech.com. If you are still unable to resolve a problem, call (604) 320-7227 from 8:30 a.m. to 5:30 p.m. Pacific Standard Time. For email support, send a description of your problem to support@essentialserver.com.

1.5 Installing PerfectCOPY

PerfectCOPY has a completely automated installation procedure. This section describes how to install PerfectCOPY from the Essential Server CD-ROM.

1. Insert the Essential Server System Restore CD in to your CD drive. The installation wizard will begin.
2. Follow the installation instructions provided.
3. When the installation process is complete, you will need to configure your backup settings. [See “Backing Up Your Data” on page 12.](#)



GETTING STARTED

Before you begin using PerfectCOPY, take a few minutes to familiarize yourself with its features. PerfectCOPY offers many time saving designs and features for ease of use.

This chapter explains user and global shares, describes how to open the PerfectCOPY window, provides an overview of the interface, describes the window tabs, and instructs you on how to close the program window and exit the program.

2.1 Shares and Permissions

A share is the portion of disk space on the server assigned to any user. Table 2.1 provides a summary of user permissions for shares. There are two types of shares: global and user.

- **Global shares** — can be thought of as collaborative shares. They allow all users access to files stored within the share. All users can add, view, edit and remove files stored in a global share.

Example: *Your company is creating a new product and has created a project team that includes members from different departments: marketing, documentation, and development. Instead of having to email files to all members of the project team, you can simply save your work to the collaborative global share. This allows all team members to have access to all project information. Global shares are helpful when team members within the company run different operating systems (i.e. Windows, Mac, Unix, etc...).*

- **User shares** — can be categorized two ways: private or public.
 - Private share** — files stored in a private share can be viewed by the user and the administrator only.
 - Public share** — files stored in the public share can be viewed by all, but only the user and the administrator can edit or remove files in the share. Guest users have no access to user shares.

Table 2.1: User permissions for global and user shares

	Global Shares	User Shares	
		Private shares	Public shares
Administrator	full access	full access	full access
Share owner	N/A	full access	full access
Registered users	full access	no access	view files in share

2.2 Opening PerfectCOPY

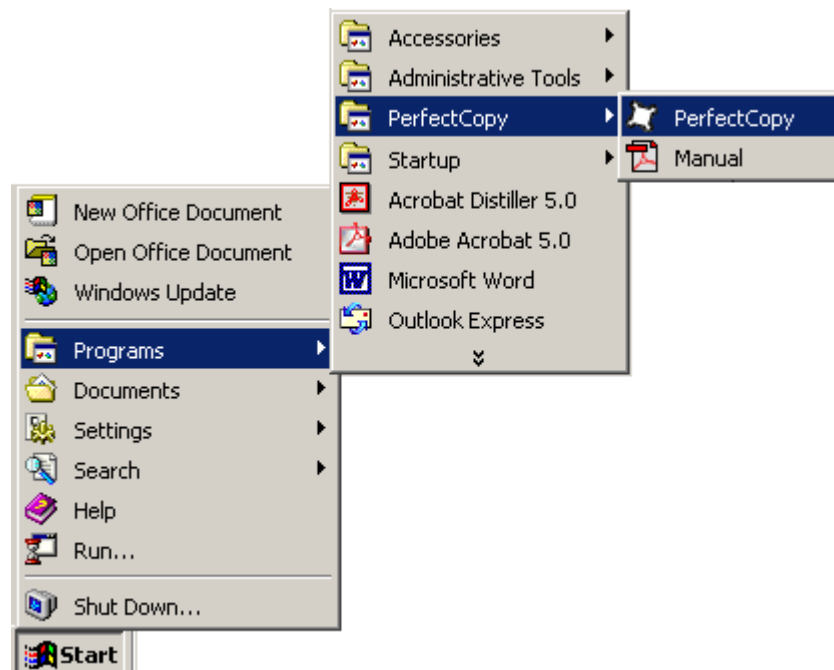
PerfectCOPY launches when you start your computer and is accessible from the Windows system tray (the area near your clock).



- In the Windows system tray, right click the **PerfectCOPY** icon and select **Setup** from the popup menu.

If you have exited PerfectCOPY and would like to restart the application:

- On the Windows taskbar, click **Start**, select **Programs**, select **PerfectCOPY**, and select **PerfectCOPY**.

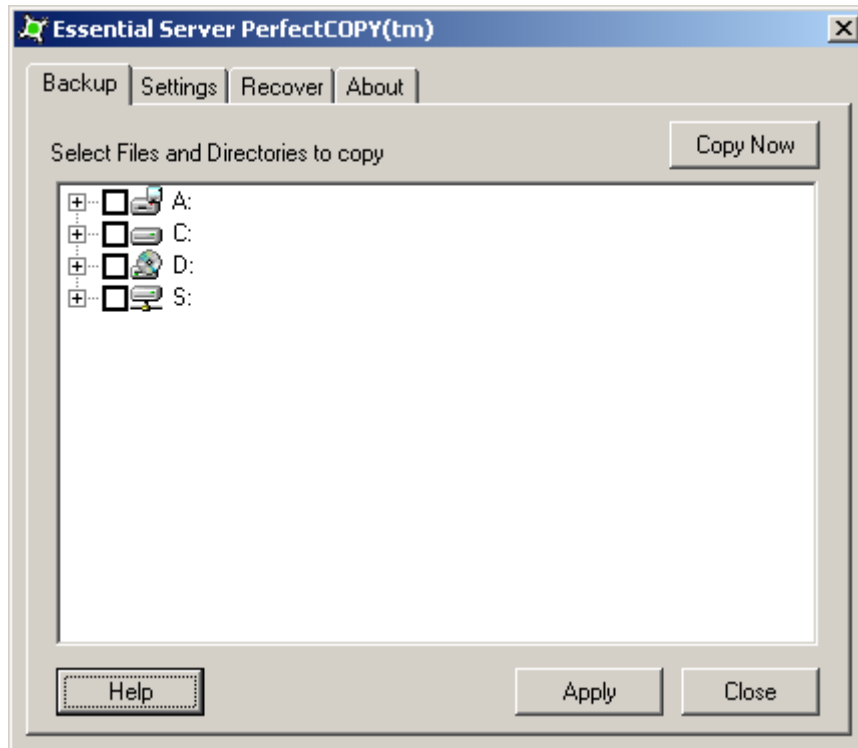


Launching PerfectCOPY from the Start menu

2.3 Program Interface

The program interface displays the major PerfectCOPY features accessible from the program's window tabs. Backing up your local data to the Essential Server NAS+ server is as easy as a few mouse clicks.

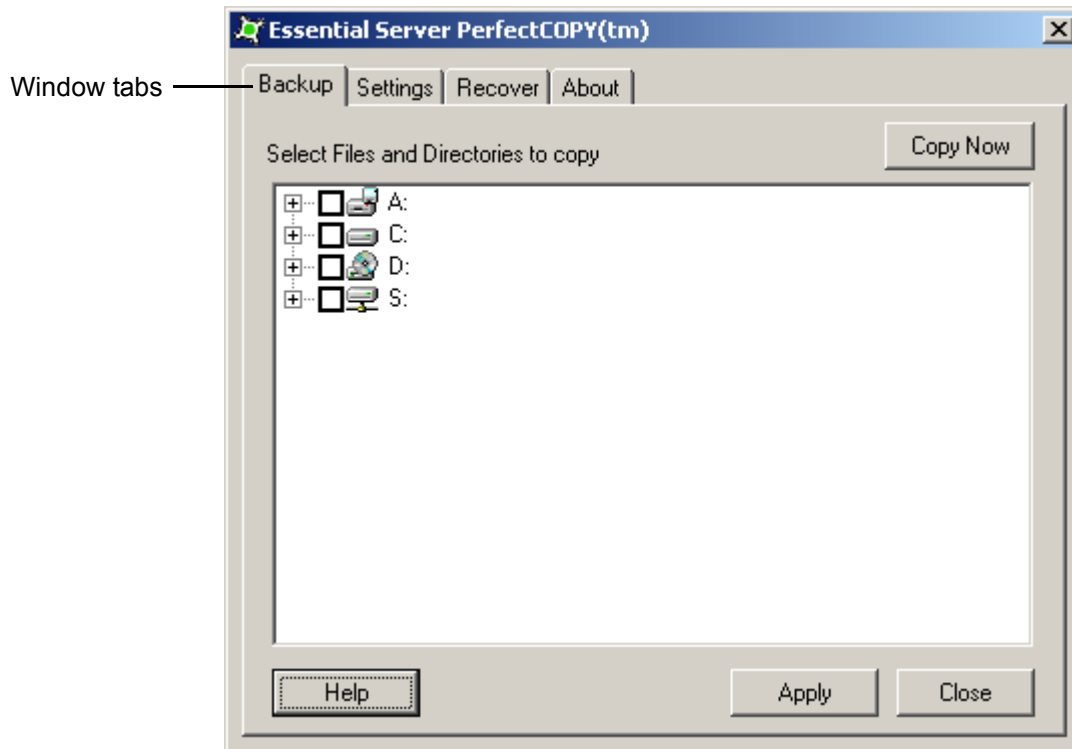
To toggle between windows, position your cursor over a tab and click. To access the popup menu on the **Recover** tab, click to select the file(s) you wish to recover and click the right mouse button.



Essential Server PerfectCOPY interface

2.4 Window Tabs

Located immediately below the title bar, window tabs allow you to toggle through the PerfectCOPY functions with a single click of your mouse.



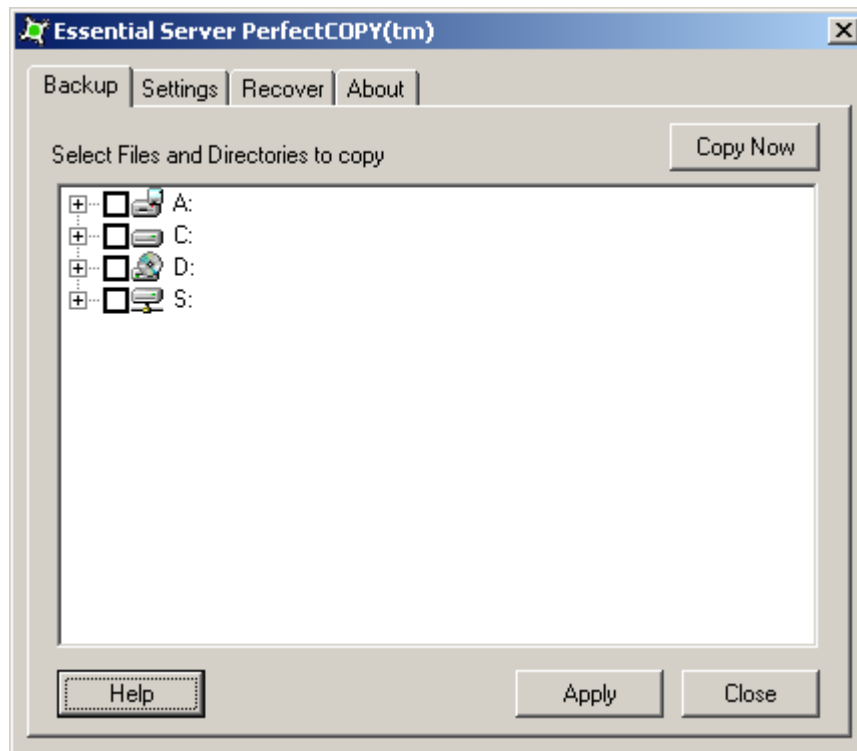
Essential Server PerfectCOPY interface > Window tabs

The following tabs are available:

- **Backup** — click this window tab to select the files or folders you wish to backup to your share on the Essential Server NAS+.
- **Setting** — click this window tab configure your backup settings.
- **Recover** — click this window tab to search through previously backed up files you wish to recover.
- **About** — click this window tab to view information about this release of PerfectCOPY.

Backup Tab

The **Backup** window tab includes the following options.

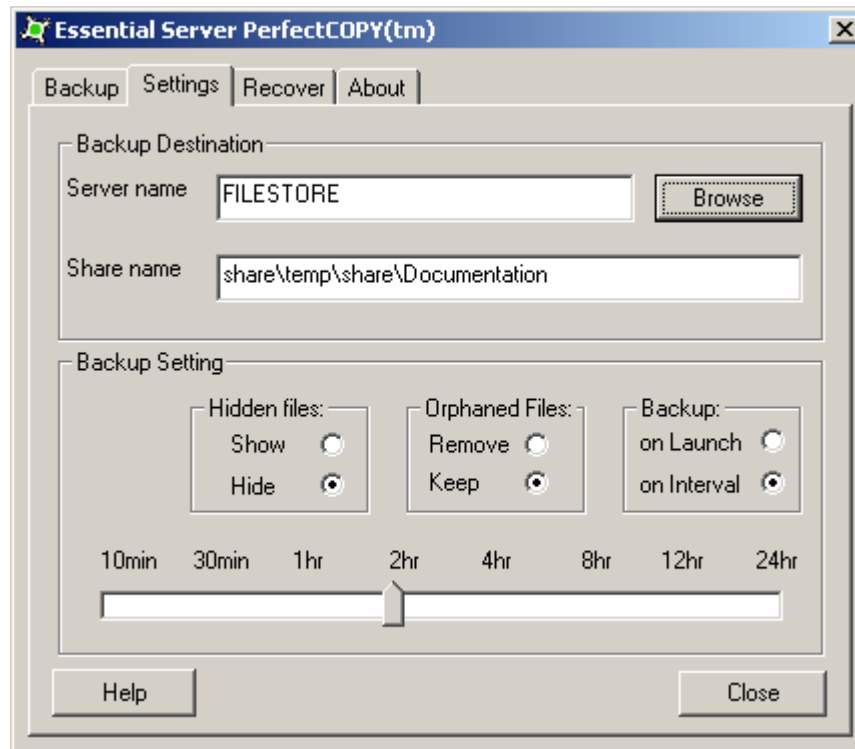


Essential Server PerfectCOPY window > Backup tab

- **Select files & directories to copy** — allows you to select the files or folders you wish to back up. The initial file structure that displays in the window reflects your network file structure and may differ from the image shown above. [See “Selecting Files for Backup” on page 13.](#)
- **Copy Now** — when you have established the local files you wish to back up and selected the server to which you will back them up, **Copy Now** allows you to perform an instant backup. [See “Instantly Back Up Files” on page 17.](#)
- **Help** — allows you to access PerfectCOPY’s online help files. [See “Program Help Files” on page 23.](#)
- **Apply** — allows you to apply the changes made to the backup files and folders.
- **Close** — allows you to close the PerfectCOPY window. [See “Closing PerfectCOPY” on page 11.](#)

Settings Tab

The **Settings** window tab includes the following options.



Essential Server PerfectCOPY window > Settings tab

- **Server name** — allows you to type the name of the Essential Server NAS+ server.
- **Browse** — allows you to search for the server and share to which you wish to backup your data. When you use the **Browse** button, PerfectCOPY automatically adds the name of the server and share to the respective fields, making it unnecessary for you to type the names yourself.
- **Share name** — allows you to enter the path and name of the share to which you wish to back up your data.
- **Hidden files** — allows you to show or hide hidden files on the server and your local machine. If you select **Hide**, hidden files on your computer and the server will not display. If you select **Show**, hidden files on your computer and the server will display.
- **Orphaned Files** — allows you to determine if you wish to keep or remove orphaned files. If you select **Remove**, files you have deleted on your local machine will also be deleted from your share on the Essential Server NAS+ server. If you select **Keep**, files you delete on your local machine will not be deleted from the Essential Server NAS+ server.

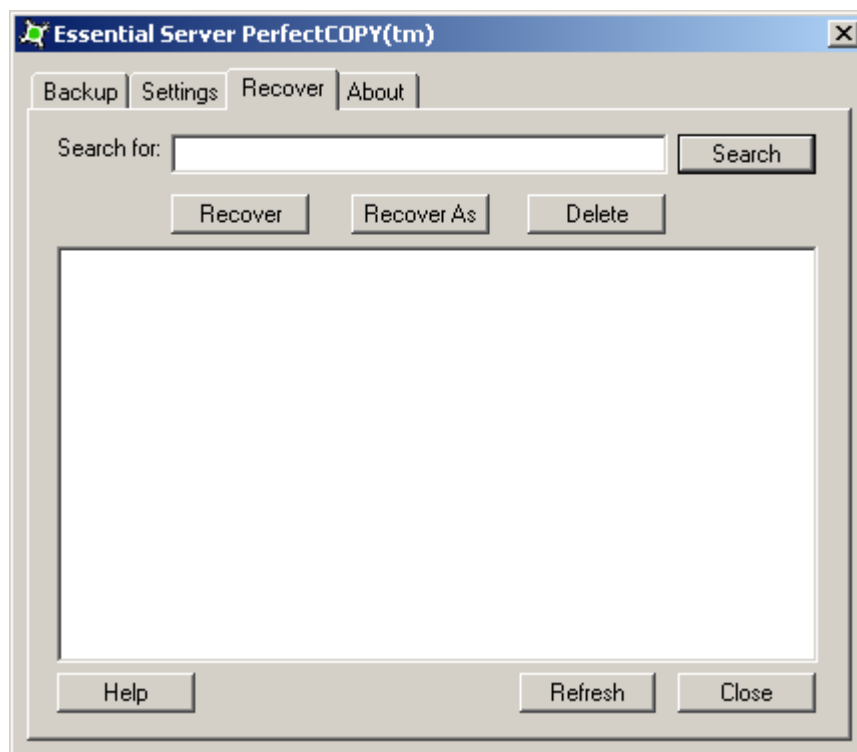
- **Backup** — allows you to determine when you wish to back up your data. If you select **on Launch**, the files specified in the **Backup** window tab will be backed up to the specified share when you launch your computer. If you select **on Interval**, the files specified in the **Backup** window tab will be backed up at the interval you specify with the time slider.
- **Time slider** — allows you to select a time interval to backup your files.

Tip: *If you have selected Backup on Launch, the time slider is disabled.*

- **Help** — allows you to open the PerfectCOPY online help files.
- **Close** — allows you to close the PerfectCOPY window.

Recover Tab

The **Recover** window tab includes the following options.



Essential Server PerfectCOPY window > Recover tab

- **Search for:** — allows you to enter the file name for which you are searching.
- **Search** — allows you to perform a search for the file(s) specified in the **Search for:** field.

- **Recover files/folder** window — displays the files and folders you are able to restore.
- **Help** — allows you to open PerfectCOPY's online help files.
- **Refresh** — allows you to refresh the file and folder list.
- **Close** — allows you to close the PerfectCOPY window.

About Tab

The **About** window tab displays information about this version of PerfectCOPY.



Essential Server PerfectCOPY window > About tab

2.5 Closing PerfectCOPY

When you have finished using PerfectCOPY, you may close the PerfectCOPY window. This allows PerfectCOPY to run in the background and perform the specified tasks without cluttering your desktop.

- On any window tab, click **Close**.
- Or,
- Click the **Close Window** icon (**X**) in the upper right corner of the screen.

2.6 Exiting PerfectCOPY

You may exit PerfectCOPY any time you wish but PerfectCOPY will not be able to perform backups scheduled on an interval if it is exited.

- In the Windows system tray, right click the **PerfectCOPY** icon and select exit from the popup menu.

3 |

BACKING UP YOUR DATA

PerfectCOPY works in conjunction with Essential Server (ES) NAS+ to ensure your data is safe, secure, and always available in the event of a disaster.

PerfectCOPY makes backing up the data stored on your local machine (the computer you work on every day at work) to the ES NAS+ easy for you to do. It involves three steps.

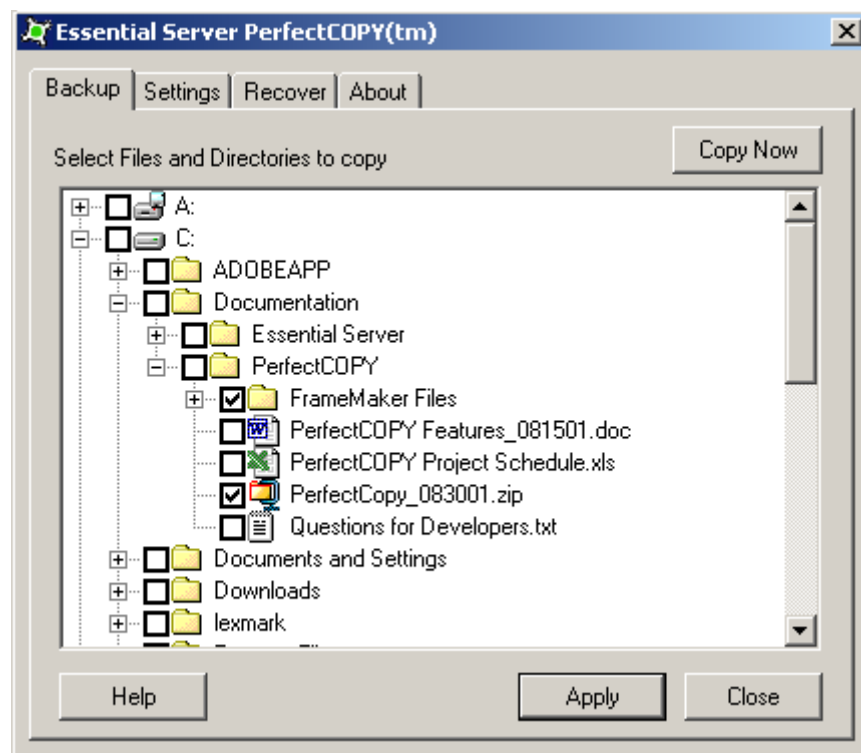
1. Select the files you wish to backup.
2. Decide which share on the ES NAS+ you would like to back them up to.
3. Specify how often you want the backup to happen.

Once the backup settings have been configured, the PerfectCOPY window can be closed and the backup will go on as scheduled. Alternatively, PerfectCOPY is easy to configure, allowing you to quickly change which files are backed up to which share and how often.

3.1 Selecting Files for Backup

PerfectCOPY allows you to backup any files and folders you select. When you select a folder to backup, all the files and folders in that directory are also included.

1. Open the **PerfectCOPY** window. [See “Opening PerfectCOPY” on page 4.](#) PerfectCOPY launches on the **Backup** tab.
2. Search through the directory structure for the files and folders you wish to backup.
3. To select a file or directory, click the black box next to the file or folder. When selected, a check mark displays in the black box next to the folder



Essential Server PerfectCOPY window > Backup tab > Selected files and folders

4. To save the changes, click **Apply**.
To disregard the changes and close the **PerfectCOPY** window, click **Close**.

3.2 Configuring Your Backup Settings

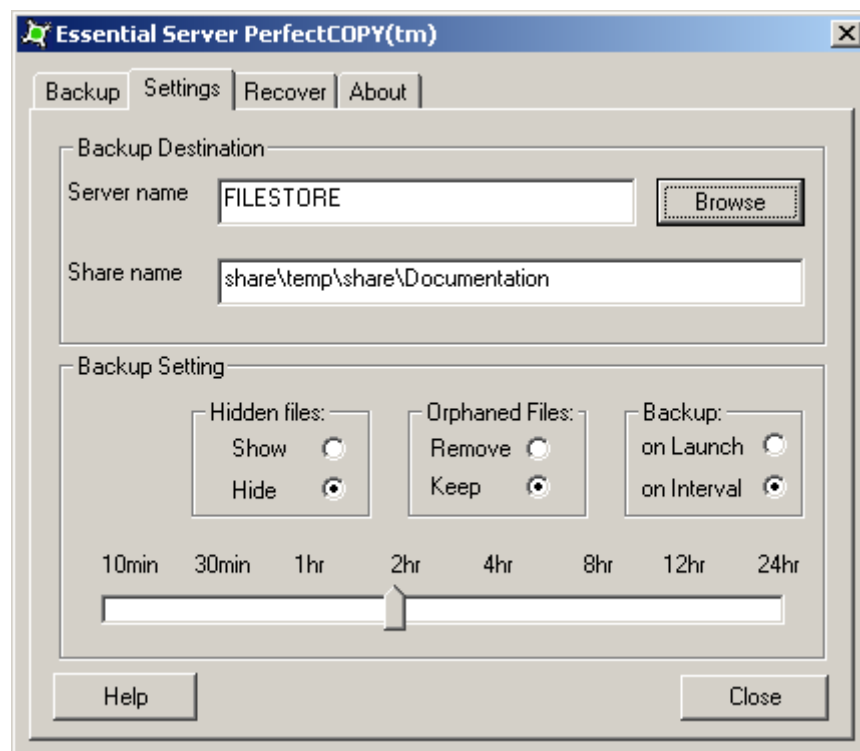
Before you can perform a backup, you must specify the server and share to which you will be backing up your data and the backup settings, including what to do with orphaned files and the backup time interval.

Configuring your backup settings is made up of two processes: selecting a backup destination and specifying your backup settings.

Selecting a Backup Destination

When you select a backup destination, you are searching your network for the Essential Server NAS+ server and choosing the share to which you wish to copy your files.

1. Open the **PerfectCOPY** window. [See “Opening PerfectCOPY” on page 4.](#)
2. Click the **Settings** tab. The **Settings** window displays.



Essential Server PerfectCOPY window > Settings tab

3. To specify the backup destination, including the server and share names, click **Browse**. The **Browse Share** window displays.



Essential Server PerfectCOPY window > Settings tab > Browse > Browse Share window

4. Search through the directory listing until you find the Essential Server NAS+ machine.
5. To display the shares on the server, double click the machine name.
6. Select the share to which you wish to back up your data. The share can be a global share or a share you own.

Note: *Make sure you have the correct user permissions for the share to which you wish to back up your local files. Otherwise your backup data will not be saved on the Essential Server. For information on user permissions, refer to [“Shares and Permissions” on page 3](#).*

7. To select the specified share and close the **Browse Share** window, click **OK**.
To disregard your selection and close the **Browse Share** window, click **Cancel**.
8. Proceed to [“Specifying the Backup Settings” on page 16](#) to complete the configuration of your backup settings.

Specifying the Backup Settings

Once you have selected a backup destination, you need to specify the backup settings. Specifying the backup settings allows you to decide what to do with orphaned files and how often you wish to backup the files and folders selected on the **Backup** tab.

Orphaned files are files that are deleted on your local machine but still exist on the ES NAS+. Choosing to keep orphaned files means that if you delete a file on your local machine, the next time PerfectCOPY backs up your data to the ES NAS+, the files you deleted on your computer will remain on the server. This allows you to keep a copy of every file you create. Choosing to remove orphaned files means that if you delete files on your local machine, the next time PerfectCOPY backs up your data to the ES NAS+, the files will be deleted from the server.

1. If you have not already done so, select a backup destination. [See “Selecting a Backup Destination” on page 14.](#)
2. Determine what you would like to do with hidden files on your computer.
 - To display hidden files, select **Show**.
 - To hide hidden files, select **Hide**.
3. Choose what you would like to do with orphaned files.
 - To keep orphaned files on the server, select **Keep**.
 - To remove orphaned files from the server, select **Remove**.
4. Choose when you would like to back up your data.
 - To backup your data only when you launch your computer, select **Backup on Launch**. You may skip step 4 and proceed to step 5.
 - To backup your data on a set time interval, select **Backup on Interval**.
5. To choose the desired interval at which you wish to backup your data, press and hold down the left mouse button and move the time slider left or right.
6. To close the **Essential Server PerfectCOPY** window, click **Close**.

If you wish to continue working in PerfectCOPY, toggle between the tabs by putting your mouse over the tab and clicking.

3.3 Instantly Back Up Files

When you have selected the files and folders you wish to back up and specified your backup settings, you may perform an instant backup. There are two ways you can instantly back up your files: use the **Copy** option in the system tray popup menu or through the PerfectCOPY interface.

Note: *PerfectCOPY only backs up new files and existing files that have changed. This reduces the backup time and network traffic.*

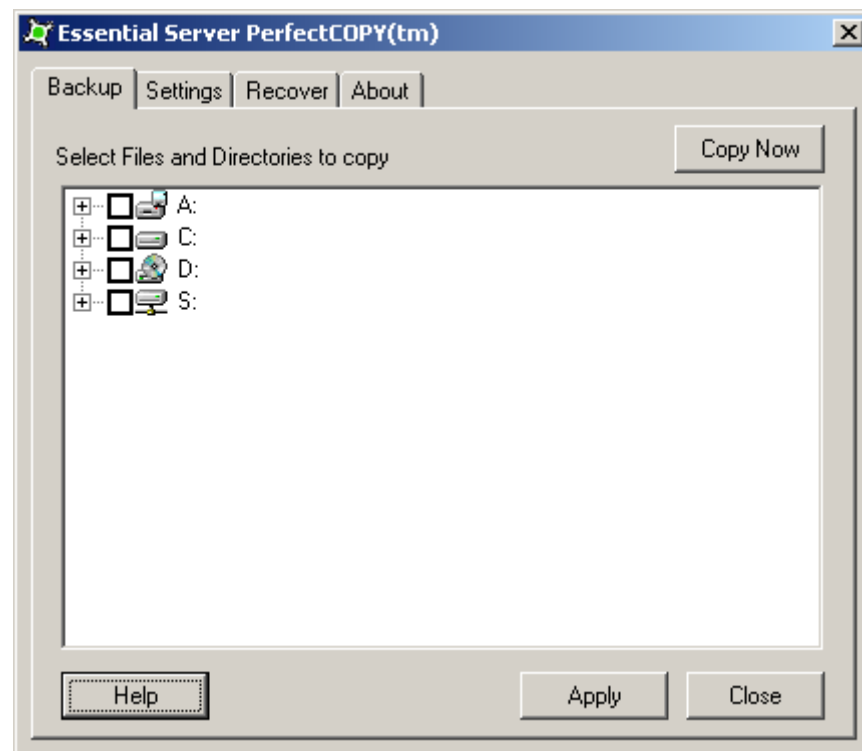
To instantly back up your files using the system tray popup menu:

- Right click the **PerfectCOPY** icon in the system tray and select **Copy** from the popup menu.

The files specified in the **Backup** window will be instantly copied to the Essential Server.

To instantly back up your files through the PerfectCOPY interface:

1. Open the **PerfectCOPY** window. [See “Opening PerfectCOPY” on page 4.](#) The **Essential Server PerfectCOPY** window displays on the **Backup** tab.



Essential Server PerfectCOPY window > Backup tab

2. If you have not already done so, specify the files and folders you wish to back up. [See “Selecting Files for Backup” on page 13.](#)

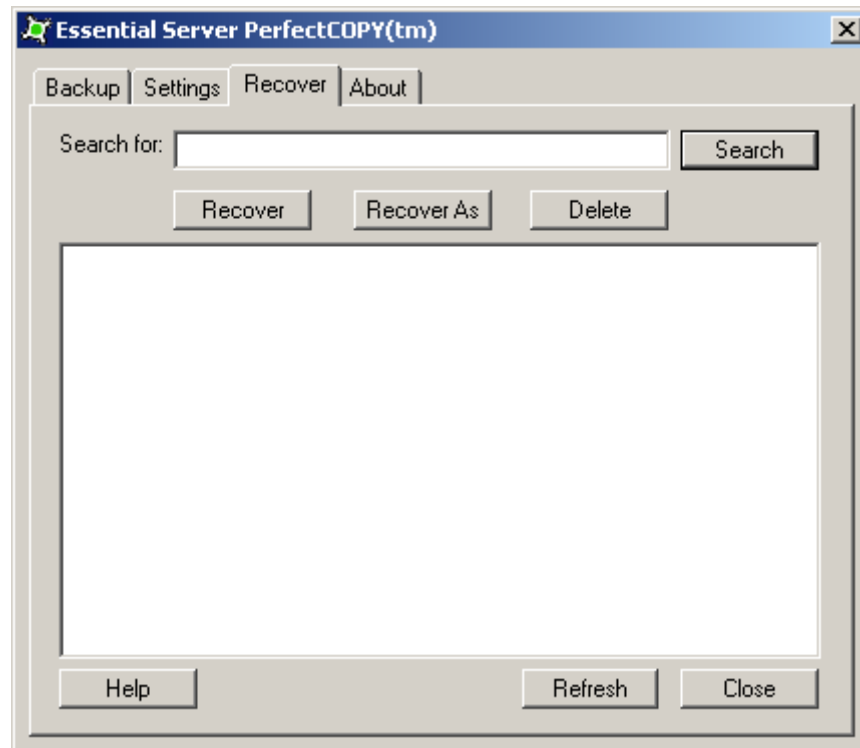
3. If you have not already done so, configure your backup settings. [See “Configuring Your Backup Settings” on page 14.](#)
4. On the **Backup** tab, click **Copy Now**. When the Copy Now process is complete, the **Finished** window displays.
5. To close the **Finished** window, click **OK**.
6. To close the **Essential Server PerfectCOPY** window, click **Close**.

If you wish to continue working in PerfectCOPY, toggle between the tabs by putting your mouse over a tab and clicking.

3.4 Verifying Your Backup

Verifying your backup is an easy process.

1. Open the **PerfectCOPY** window. [See “Opening PerfectCOPY” on page 4.](#)
2. Click **Recover**. The **Recover** window displays.



Essential Server PerfectCOPY window > Recover tab > Selected files and folders

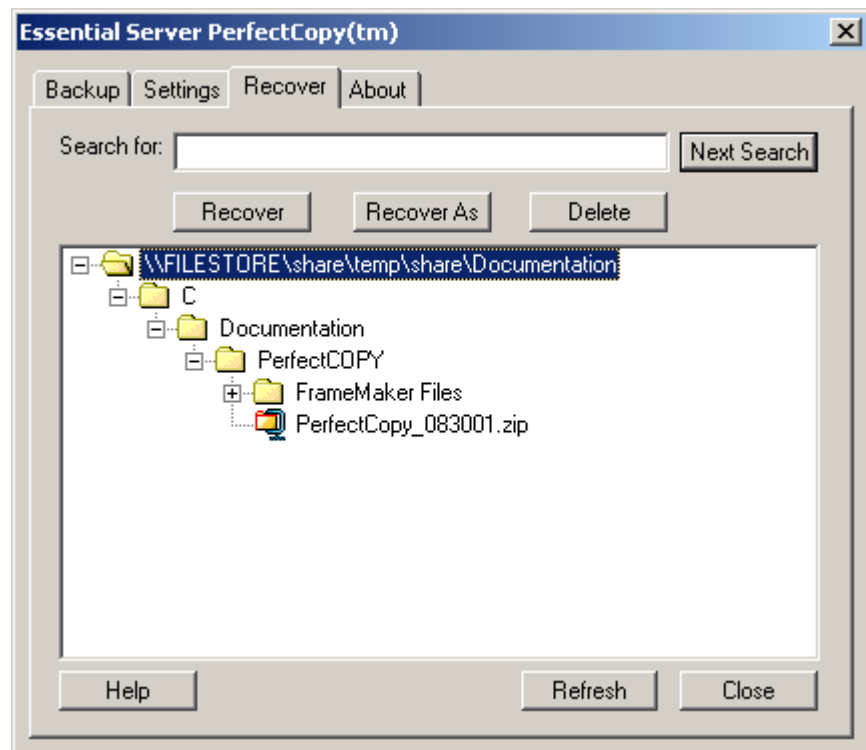
3. Click **Refresh**.
4. Browse through the directory structure to find the recently backed up files.

3.5 Recovering Files From the Essential Server NAS+

This function allows you to search the directory structure for individual files or folders that you wish to restore or recover from the Essential Server NAS+.

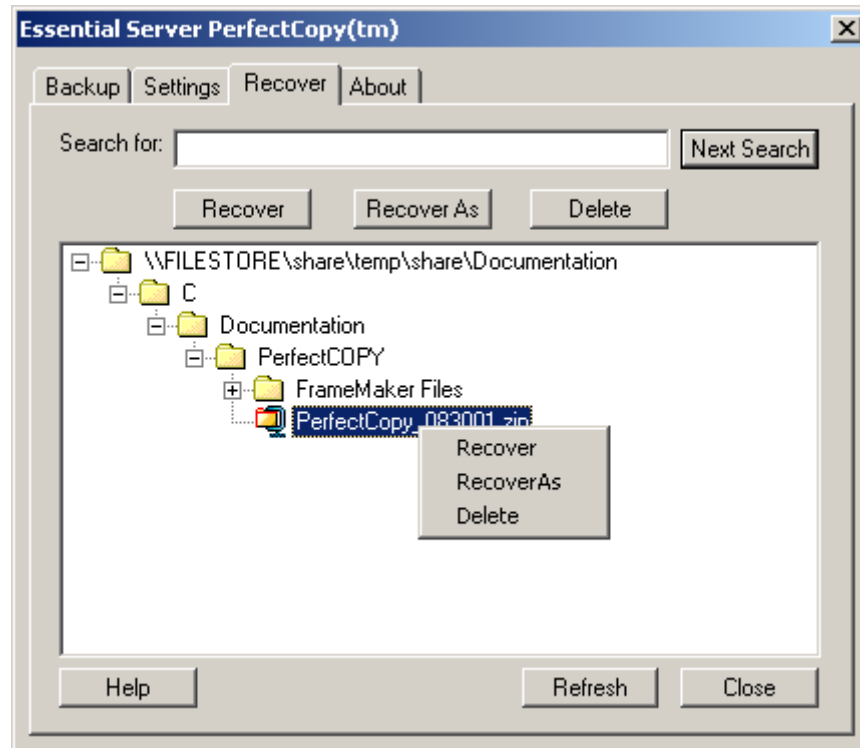
Example: *On Monday, you are updating a project schedule. You back up your files before you go home that night. On Tuesday, you try to open the project schedule document on your computer and discover that the file is corrupted. You can search through the directory structure on the **Recover** window tab to find the file that was saved on the Essential Server and recover it.*

1. Open the **PerfectCOPY** window. [See “Opening PerfectCOPY” on page 4.](#)
2. Click the **Recover** tab. The **Recover** window displays.
3. Find the file you wish to recover by doing one of the following.
 - Type the exact file name in to the **Search for:** field and click **Search**.
 - Search through the directory structure for the files and/or folders you wish to recover.



Essential Server PerfectCOPY window > Recover tab > Selected files and folders

4. Select a recover option by doing one of the following.
 - Select the file you wish to recover and click **Recover** or **Recover As**.
 - Right click the file you wish to recover and select an option from the popup menu.



Essential Server PerfectCOPY window > Recover tab > Right click popup menu

- **Recover** — select if you wish to recover the file to the same directory on your computer.
 - **Recover As** — select if you wish to recover the file to a new directory.
5. To delete a file from the Essential Server do one of the following:
 - Select the file you wish to delete and click **Delete**, or
 - Select the file you wish to delete, right click and select Delete from the popup menu.

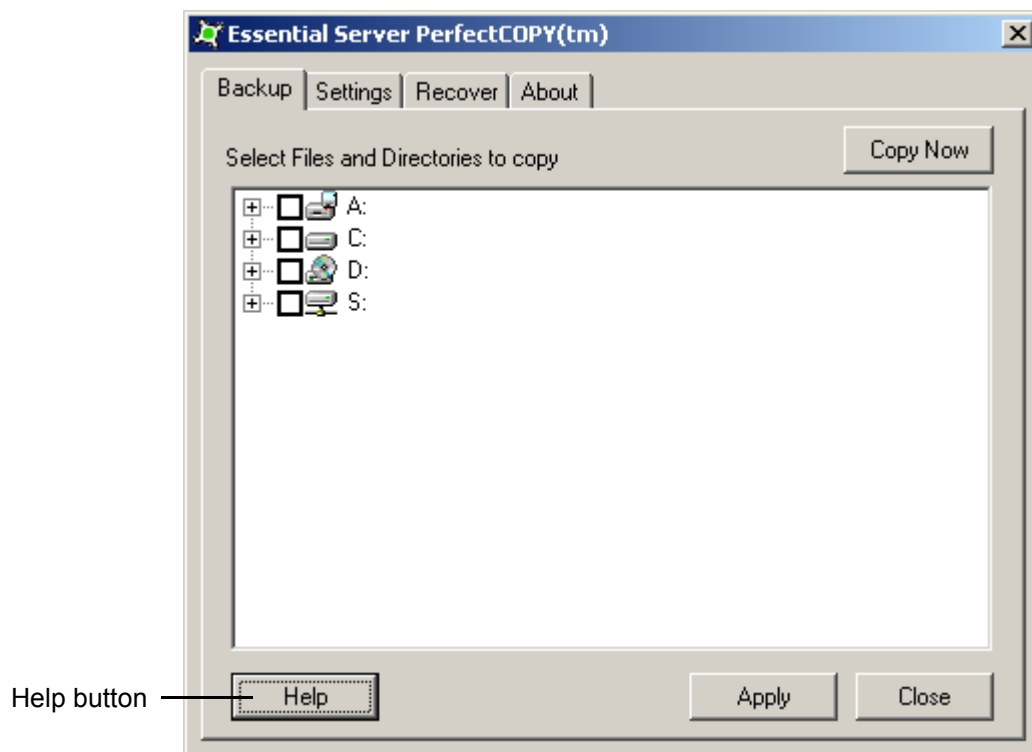
Tip: *You may wish to delete files from the ES NAS+ server when you want to clean up your share or when your share is reaching capacity.*

4 |

GETTING HELP

PerfectCOPY offers online help files that are included in the program.

The **Help** button is located on every tab of the interface in the bottom left corner.

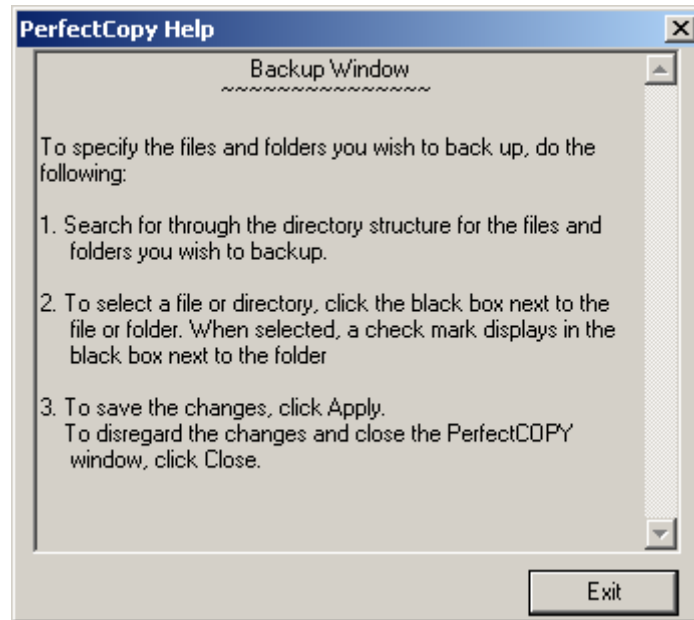


Essential Server PerfectCOPY window > Help button

4.1 Program Help Files

If you are experiencing problems using PerfectCOPY, you may refer to the program help files.

1. On any tab in the program, click **Help**. The **PerfectCOPY Help** window displays.



Essential Server PerfectCOPY window > Help > PerfectCOPY Help window

2. To scroll through the help window, use the scroll bars.
3. To close the help window at any time and return to the PerfectCOPY program, click **Exit**.

4.2 User Manual

An electronic version of the PerfectCOPY manual is available from the Start menu.

- On the Windows taskbar, click **Start**, select **Programs**, select **PerfectCOPY**, and select **Manual**.

Note: *To view the PerfectCOPY user manual, you must have Adobe Acrobat or Adobe Acrobat Reader installed.*



LIST OF ILLUSTRATIONS

Page	Figure Caption
4	Launching PerfectCOPY from the Start menu
5	Essential Server PerfectCOPY interface
6	Essential Server PerfectCOPY interface > Window tabs
7	Essential Server PerfectCOPY window > Backup tab
8	Essential Server PerfectCOPY window > Settings tab
9	Essential Server PerfectCOPY window > Recover tab
10	Essential Server PerfectCOPY window > About tab
13	Essential Server PerfectCOPY window > Backup tab > Selected files and folders
14	Essential Server PerfectCOPY window > Settings tab
15	Essential Server PerfectCOPY window > Settings tab > Browse > Browse Share window
17	Essential Server PerfectCOPY window > Backup tab
19	Essential Server PerfectCOPY window > Recover tab > Selected files and folders
20	Essential Server PerfectCOPY window > Recover tab > Selected files and folders
21	Essential Server PerfectCOPY window > Recover tab > Right click popup menu
22	Essential Server PerfectCOPY window > Help button
23	Essential Server PerfectCOPY window > Help > PerfectCOPY Help window



INDEX

A

- About tab **10**
- accessing
 - online help **23**
 - PDF user manual **24**

B

- back up files
 - on interval **9, 16**
 - on launch **9, 16**
- backup destination **14**
- backup settings
 - configuring **14**
- Backup tab **7**
- backups
 - instant backups **17**
 - verifying **19**

C

- closing PerfectCOPY **11**

D

- delete files from ES NAS+ **21**

E

- Essential Server NAS+ **1**
 - deleting files **21**
- Essential Server System Restore CD **2**
- exiting PerfectCOPY **11**

F

- files
 - back up on interval **9, 16**
 - back up on launch **9, 16**
 - backing up **12**
 - delete from ES NAS+ **21**
 - hide hidden files **8**
 - keep orphaned files **8**
 - remove orphaned files **8**
 - selecting for backup **13**
 - show hidden files **8**
- folders
 - backing up **12**

G

- global shares
 - defined **3**

H

- hidden files
 - hide **8**
 - show **8**

I

- installing PerfectCOPY **2**
- interface **5**
 - window tabs. *See window tabs*

O

- online help, accessing **23**
- opening PerfectCOPY **4**
- orphaned files
 - defined **16**
 - keep **8**
 - remove **8**

P

- private user shares **3**
- public user shares **3**

R

- Recover tab **9**
- recovering
 - files **20**
 - folders **20**

S

- selecting a backup destination **14**
- Settings tab **8**
- shares
 - global shares **3**
 - user shares **3**

system tray **4, 11**

U

user manual, accessing **24**

user shares

 defined **3**

 private **3**

 public **3**

V

verifying your backup **19**

W

window tabs **6**

 About tab **10**

 Backup tab **7**

 Recover tab **9**

 Settings tab **8**

windows, toggle between **5**