

Backing Up Data

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As part of your disaster recovery plan for Sybiz Vision, do you have the ability to restore back the data you keep backing up so religiously in such a way that it minimises re-keying of data to get it back to the current data date?

This article looks at the backup methodology you should use to ensure that data can be restored and accessed if and when required.

Frequency

The frequency of backups should be aimed at minimising the risk to your company of losing data to the extent that you cannot go without it. For instance, if you feel that losing one half day's work in Sybiz Vision would be detrimental to your company then you should be backing up half daily. If however, you feel that re-keying one week's work would not hinder you too much, then backing up weekly or even fortnightly may suit you. Setup your backup methodology to ensure that you minimise the loss of data that you can effectively and quickly re-key.

Type of Backup

We then need to determine the type of data we have and the structure of that data. This will help determine the type of backup we should be performing. Sybiz Vision is a collection of database files that work together to give you an accounting system that reports your financial status. Unlike word documents, your Sybiz Vision database is being written to all day and may update more than eighty files in one process. It is critical that a full backup of those files is performed rather than a differential or incremental backup. A full backup backs up all files in the database directory (and other relevant directories) as they stand at a certain point in time. From a support perspective it is then easier to obtain a copy of the database, and also be absolutely sure that it contains the files that were backed up at the same time.

Redundancy

Lastly we have to consider redundancy of the data. Taking one copy of the data onto a tape and then reusing that tape day after day is a cheap way of backing up. However if you have a problem with your database, and we determine it cannot be fixed, then we will ask you to restore back to a date prior to when the problem occurred. Although uncommon, there have been instances when a user has been requested to restore back one month. Using the one tape scenario, you would not be able to restore back more than one day's data.

So we should look at how many backups we retain and for how long. Generally the following is considered a safe methodology for retaining backups. It is based on an assumption that most problems occurring in a database will be found quickly, and the chances of a problem being found say a month previous would be fairly small. It is also based on the fact that if re-keying data, re-keying one month compared to re-keying one month and one week end are pretty much the same.

It is called the Grandfather, Father, Son backup. The example we use here will assume that users want to backup once per day.

Basically the son is the daily backups of which there are four, being Monday, Tuesday, Wednesday and Thursday. These backups are reused the following week and so forth until such time as the media is considered unsuitable for retaining a GOOD backup of the data.

The father is your weekly backups of which there may be five (but generally only four), being Friday Week 1, Friday Week 2, Friday Week 3 and so on. These backups are reused the following month on their respective weeks until the media is considered unsuitable for retaining a GOOD backup of the data.

The grandfather is your monthly backups of which there are twelve, being January, February etc. These can be kept permanently or reused the following year dependant on your needs. The backup of the data is done just prior to a new period rollover, and generally there are two copies made, one being kept offsite in a safe location.

Also there can be a backup taken at the end of the financial year prior to performing a new period in Sybiz Vision as well as one taken when you feel that last year's final statements are completed and no further postings will be made in that year. Each of these backups is usually three copies, two being kept offsite in two different locations.

As can be seen we always have the last five days of data to go back to if required. If we need to go back (and the risk is generally smaller the further we go back), then we can restore the last four weeks (or five) if required. The same can be said of restoring back twelve months.

Obviously your own strategy will look at the costs of backing up and retaining your data. If using tapes, then this can be a significant investment to use the above methodology. However to any that have had the misfortune of needing to restore back that far, it has been well worth the cost. Why? Because if it is a database problem is not fixable then the only option is to start a new database. This in itself is a lengthy process, and the resulting loss of transaction history can end up being a distinct disadvantage to many companies.

The last thing is "Can you restore?". Most people are doing backups quite regularly, but not too many actually test to ensure that the data they are backing up can be restored until it is too late. You should maintain a regular test procedure to ensure that everything you think is backing up is being backed up, and that everything that has been backed up can be restored. If you require assistance with initiating a better backup and restore procedure then contact one of our consultants at The Support House on 08 8377 3222.