

# Take Control

## *of* Easy Backups in Leopard

*by* Joe Kissell

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This is a free sample of "Take Control of Easy Backups in Leopard."  
[Click here to buy the full 96-page ebook for only \\$10!](#)

## READ ME FIRST

Welcome to *Take Control of Easy Backups in Leopard*, version 1.1, published by TidBITS Publishing Inc. in June 2008.

Good backups protect the important information on your computer from many dangers. This book describes an easy yet reliable strategy for backing up your Mac, of which Leopard's Time Machine feature may be one component. This book was written by Joe Kissell, and it was edited by Jeff Carlson.

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### Basics

When following my instructions, you may get stuck if you don't know certain basic facts about Mac OS X or if you don't understand Take Control syntax for things like working with menus:

- **Paths:** I occasionally use a *path* to show the location of a file or folder. For example, Mac OS X stores most utilities, such as Terminal, in the Utilities folder. The path to Terminal is:  
`/Applications/Utilities/Terminal.`

The slash at the start of the path tells you to start from the root level of the disk. Some paths begin with a tilde (~), which is a

shortcut for a user's home folder. For example, if a person with the user name **joe** wants to install fonts that only he can access, he would install them in his `~/Library/Fonts` folder, which is another way of writing `/Users/joe/Library/Fonts`.

- **Menus:** When I describe choosing a command from a menu in the menu bar, I use an abbreviated description. For example, the abbreviated description for the menu command that provides information about a file in the Finder is “File > Get Info.”
- **Finding preference panes:** In this book, I discuss settings in System Preferences that may need to be changed. To open System Preferences, click its icon in the Dock or choose System Preferences from the  menu. When that window opens, click the icon of the pane whose settings you want to adjust. I refer to these panes using an abbreviated notation such as “the Time Machine preference pane.”

## What's New in This Version

Version 1.1 is a significant update. Among numerous other things, it includes the following major changes:

- Information on Apple's Time Capsule backup appliance. This involved numerous changes, but in particular, see:
  - ◇ [Why Use an External Hard Drive?](#) (p. 10).
  - ◇ [Should You Buy a Time Capsule?](#) (p. 25).
  - ◇ [Restore a disk using Time Machine](#) (p. 87). This section also now describes how to restore an entire disk over a network.
- Updated information on QRecall; see both [QRecall](#) (p. 16) and [QRecall Tips](#) (p. 75).
- A warning about certain Western Digital hard drives that aren't bootable with PowerPC-based Macs; consult [Choose an Interface \(or Several\)](#) (p. 21).
- A sidebar about how Apple almost, but not really, yet sort of enabled Time Machine for AirPort Disks; read [The AirPort Disk Fiasco](#) (p. 28).

- Throughout the book, mentions of the system-wide Time Machine menu (🌀) that Apple added in Mac OS X 10.5.2; see, for example [Set Up and Use Time Machine](#) (p. 41).
- A sidebar explaining how to [Migrate from a Drive to a Time Capsule](#) (p. 43).
- Updated information on working with CrashPlan in [Items to consider excluding](#) (p. 46).
- A corrected description of what happens when you delete items from a Time Machine backup; see [Delete Files from a Time Machine Backup](#) (p. 58).
- Additional suggestions for solving or avoiding Time Machine problems; refer to:
  - ◇ [Remount network volumes](#) (p. 65).
  - ◇ [Find out what Time Machine is really up to](#) (p. 67).
  - ◇ [Avoid running Time Machine when applications have large files open](#) (p. 68).
- Info on how to [Increase wireless network throughput](#) (p. 73).
- A look at storing your Time Capsule offsite with the Transport service; see [Use Transport](#) (p. 83).

## INTRODUCTION

This afternoon—a couple of hours before I sat down to type this introduction—I had a surprising experience. I had just downloaded a file from a Web site, and when I double-clicked it, the wrong application opened. When I tried to open it with the right application, I found that the application itself was missing. In fact, a whole folder full of applications was missing that had definitely been inside my main Applications folder a day or two ago.

I have no idea where the folder went. Obviously I must have done something to delete it inadvertently, but since I didn't notice myself doing it at the time, I don't know what that was or when it happened. But—and here's the happy ending—I was able to restore the missing folder, using Time Machine, in exactly four clicks. I've been testing Time Machine for a long time, but it just so happened that on the day I was to begin writing a book that covers it in detail, I had my first experience of using it to recover something I'd lost in real life.

My point in telling you this story is not to say, “Oh look, Time Machine actually works!” (though that's true as far as it goes). The point is, the experience of randomly and surprisingly losing some important file can happen to anyone, even to a computer geek like me. That file might be an irreplaceable photo of your child, the song you've been composing for the last month, or an email message from a celebrity. It was that last one that jarred me out of my own complacency about backups years ago: a disk crash wiped out all my saved email, including a coveted piece of correspondence that I can now never, ever get back or even prove existed.

By including Time Machine as part of Mac OS X 10.5 Leopard, Apple has highlighted the importance of good backups for every Mac user, and has also made it easier to back up and restore files than any previous backup software had done. I couldn't be more pleased to see this crucial issue addressed as part of Mac OS X, and if Time Machine gets millions of people to back up their computers who had never done it before, the world will truly be a better and happier place.

But...

Well, there are a few “buts” here. In the first place, Time Machine, nifty as it is, is not for everyone. Many a Leopard user will discover that, for any of several reasons, they need something different to meet their backup needs.

Second, Time Machine has a few—how can I put this delicately?—*curiosities*. Some important features are missing, some are hidden, and some don’t work the way one might expect. Even the features that do work properly aren’t explained well in Apple’s documentation.

And finally, although Time Machine elegantly solves certain backup problems, it doesn’t solve *every* backup problem. It is not a complete or foolproof system, and therefore I don’t recommend it as the *sole* means of backup for anyone.

All of which brings us to the reason for this book. Time Machine needs some further explication, without a doubt, and I provide that here. But this isn’t just a Time Machine book. It’s a simplified look at all the important aspects of backing up your Mac.

Among the many other things I’ve written about backups is [Take Control of Mac OS X Backups](#), which aims to be a comprehensive guide to the many choices for a Mac backup strategy. That book is much longer than this one, and although I think it’s quite good (if I do say so myself), sometimes comprehensive isn’t what you want. Perhaps you’re a busy person, and understanding the intricacies of backup technology isn’t your idea of a good time. You want someone to say, “Look, just do this.” Well, in the book you’re now reading, I cut to the chase and show you exactly how to make sure you have excellent backups. Not *every* way to do it, just one very good way.

This book shows you how to get easy and reliable backups, with a minimum of fuss. Time Machine may be an important part of your backup plan, and because I think it’s so cool and useful, I’ve included quite a bit of information about it. Whether or not you use Time Machine, though, your backup strategy needs other components, and I walk you through all of those here—with just enough background information and theory to get the job done.

This book is for people running Leopard. Although parts of it also apply to other operating systems, including earlier versions of Mac OS X, I focus on software and strategies appropriate for Mac OS X 10.5 or higher.

## QUICK START TO EASY BACKUPS IN LEOPARD

This book is best read in order, as I begin by explaining the strategy I recommend and progressively work through each part of a complete backup system. Even if you choose to skip around, be sure to read [Understand Joe's Basic Backup Strategy](#) first.

### Get your bearings:

- Learn the three essential parts of a complete backup plan, and find out what decisions you must make in order to carry it out. See [Understand Joe's Basic Backup Strategy](#) (p. 8).
- Time Machine is a fantastic backup tool, but it's not ideal for every situation. Read [Decide if Time Machine Is Right for You](#) to determine whether it will be part of the plan you follow (p. 13).

### Set up your hardware:

- One way or another, you'll be storing your backups on a hard drive (or maybe more than one). Learn what to look for when buying a drive for backups in [Pick a Hard Drive](#) (p. 18).
- You may need to partition or format your backup drive in a certain way to be suitable for backups. Find out how to do so in [Prepare Your Hard Drive](#) (p. 31).

### Configure your backups:

- If you're using Time Machine, learn all you need to know about configuring and using it in [Set Up and Use Time Machine](#) (p. 41).
- If you decided to use a different program to create archives, get setup advice in [Set Up and Use Other Archiving Software](#) (p. 74).
- Bootable duplicates are an essential part of a complete backup plan. Read [Create a Bootable Duplicate](#) (p. 77) for instructions.
- Backups are useless if they're destroyed or stolen. Find out how to keep them safe in [Store an Extra Backup Offsite](#) (p. 81).

### Recover lost data:

- The whole point of backups is being able to get your data back when you need it. Learn the steps you'll follow in [What to Do When Disaster Strikes](#) (p. 85).

## UNDERSTAND JOE'S BASIC BACKUP STRATEGY

You may have heard about numerous possible backup strategies. In fact, you may have heard about them from me. (I cover a wide range of backup options in *Take Control of Mac OS X Backups*.) While I don't want to suggest that other ways of doing backup may not be perfectly valid, I do want to suggest that you ignore them completely for now. In this book I describe a particular approach to backing up your computer that is an excellent compromise among data safety, convenience, and cost. It involves a few choices, but only a few—and I've intentionally kept the range of options I describe here as narrow as possible.

Basically, the strategy I want you to follow consists of three parts:

- Use Time Machine or another backup program to store *archives*—copies of each file as it existed at many points in time—on one partition of an external hard disk. Update your archives incrementally (copying only new or changed files each time) at least daily.
- Create a bootable duplicate of your startup volume on another partition of that same external hard disk, and update it regularly.
- Keep at least one backup copy of your important data somewhere safely away from your computer—in another building, at least, and perhaps even in another part of the world.

Furthermore, my goal is to automate nearly all of this so that backups happen in the background without your having to remember anything, press buttons, run programs, or intervene in any other way. Not only that, but I want to make even the setup process as painless as possible.

Because I want you to understand why I'm making the recommendations I do and how the whole process works, I spend just a few pages describing my suggested backup strategy in more detail and outlining what choices you'll make along the way. Later on, I provide step-by-step instructions for every part of the process.


### Why Create Archives?

Time Machine and most other backup programs protect your data by using archives—that is, backing up your files *without* overwriting or deleting earlier versions already stored on your backup media. You might be tempted to believe that all those extra versions of your files

## DECIDE IF TIME MACHINE IS RIGHT FOR YOU

Under Leopard, Time Machine is the easiest way, by far, to create archives—and it's what I recommend for most people. However, you may not be most people. So before getting into the details about Time Machine, I want to look at a few situations in which it may be the wrong solution—and what to do instead.

### TIP KEEP LEOPARD UP TO DATE

Whether or not you use Time Machine, be certain you install every update to Mac OS X that Apple releases (choose Software Update from the  menu to check for a new version). For example, Mac OS X 10.5.1, 10.5.2, and 10.5.3 fixed several problems affecting backups, and future updates will likely fix even more.

Without a doubt, Apple got a lot of things right about Time Machine. The initial release also has some bugs—see [Avoid \(or Solve\) Time Machine Problems](#)—that, in all probability, will be remedied by a free update to Mac OS X, perhaps even by the time you read this. Beyond the short-term problems, however, are larger design decisions that are unlikely to change anytime soon. If the fundamental design of Time Machine is incompatible with your needs, then you need to choose a different solution for archiving.

Time Machine makes a poor match for these backup needs:

- **High-volume backups:** Because Time Machine has no file compression feature, backups may require much more storage space than with other software. If you back up more than about 800 GB of data, the cost of external drives may become painful.
- **Multi-computer backups:** Time Machine is fine for backing up, say, two or three Macs to a single drive. But the more Macs you back up, the less sense Time Machine makes, because it wastes space with duplicate files. That is, if you're backing up three Macs, each with identical copies of a 2 GB video file, Time Machine stores three copies of that file. Some other backup programs are smart enough to store only one copy of any file that's identical across machines, saving lots of space.

## PICK A HARD DRIVE

You're going to need one or two external hard drives for your backups. (Even if you use a Time Capsule, you'll need a separate external hard drive to store a bootable duplicate; see [Should You Buy a Time Capsule?](#) for details.) Your local computer store or online retailer likely has hundreds, if not thousands, of hard drives with every imaginable combination of capacity, speed, interface, and case design—plus any of countless bells and whistles. And the selection changes constantly. In this section, I show you the most important things to look for when choosing a drive and help you to cut through some of the confusion.

### Decide on Capacity

The most important consideration in a backup drive, by far, is its capacity—how many gigabytes of data it will hold. In general, the bigger, the better. In fact, I could simply say to get the largest hard drive you can afford, and that would be a reasonable rule of thumb.

However, if you can't afford an especially large drive, or if the amount of data you have to back up is exceptionally large, you may want a bit more guidance. So figure out the size you'll need for duplicates, then the size you'll need for archives, and finally the total size to look for.

### Duplicate size

You'll store, on part of your external hard drive, an exact, bootable copy of your Mac's regular startup volume. (If you use a Time Capsule which can't store bootable duplicates, you'll use an entirely separate drive for this purpose.) But the volume that stores your duplicate need only be as large as the amount of data on your startup volume, not necessarily the whole disk. For example, if your Mac came with a 500 GB hard drive but you've filled up only 100 GB of that space, you can fit a duplicate on a 100 GB disk or partition.

Over time, though, you'll add more files to your Mac, so if you cut it that close, you'll soon outgrow your backup drive. Therefore, I suggest that you allot at least one and a half times the amount of space currently occupied on your startup volume for a duplicate. So if you have 100 GB of data on your startup volume, you want (at least) 150 GB on the duplicate. More space, of course, is perfectly fine—and will give you even more room to grow.

## PREPARE YOUR HARD DRIVE

You've just unpacked your brand new hard drive (or two), and you're ready to get busy backing up. You *might* be able to plug in the drive and start working with it immediately, but it depends. Some hard drives come formatted for Windows computers, for example, while others might be formatted for a Mac—or not at all. Some come preloaded with utilities and demo software. Some could use the wrong partition map scheme for your computer (see just ahead for an explanation), which would, among other things, prevent Time Machine from being able to see or use the drive. In short, because each manufacturer has slightly different ideas about how you might want to use your drive, you should take a few minutes, before you do anything else, to make sure it's configured correctly for your needs.

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**Outta time:** *If you have a Time Capsule, its built-in drive comes preconfigured just the way you need it, so you don't need to worry about anything in this section for your Time Capsule. However, you must still follow these steps for the external drive you use to store your bootable duplicate, and any external drive(s) you decide to attach to your Time Capsule.*

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### Choose a Partition Map Scheme

Your hard drive contains a tiny block of information called a *partition map* or *partition table* that describes things like how many volumes the drive has, how large they are, and where they're located. The way information is stored in this little block of data is called the *partition map scheme*, and the choice of scheme turns out to be crucial to how the drive can be used. Windows PCs generally use a scheme called the Master Boot Record (MBR) Partition Table; pre-Intel Macs have, since the very beginning, used a scheme called Apple Partition Map (APM); and Intel-based Macs by default use the newest and most advanced scheme, GUID Partition Table (GPT).

Each scheme carries with it certain implications, such as the maximum size and number of volumes that can be stored on that disk. The partition map scheme affects the entire drive, regardless of how many partitions it has or how those partitions are formatted.

## SET UP AND USE TIME MACHINE

Apart from a few specific cases (as covered in the previous section), Time Machine is an excellent way for most people to create archives. In this section I tell you everything you need to know about how to configure and use Time Machine, including how to tap into some obscure or hidden features, avoid bugs, and go beyond the standard ways Apple intended it to be used.

Time Machine has three visible components: a preference pane found in System Preferences (**Figure 6**), an application found in the Applications folder or in the Dock (the Dock icon is shown at right), and (as of Mac OS X 10.5.2), a Time Machine menu (🕒) in the main menu bar. (You can enable or disable this menu with the Show Time Machine Status in the Menu Bar checkbox in the Time Machine preference pane.)



**FIGURE 6**



Specify backup drives and ignored volumes in the Time Machine preference pane—in addition to switching the giant on/off button. (The icon for your backup drive may differ depending on whether you're using a local drive, a network drive, or a Time Capsule.)

## SET UP AND USE OTHER ARCHIVING SOFTWARE

If you chose to create archives using a program other than Time Machine, set that up now. I wish I could give you step-by-step instructions for using each one of those applications, but that would take too many pages (and you can read the applications' documentation for help). Instead, I want to give you a few tips for each program.

### CrashPlan Pro Tips

If you use CrashPlan Pro, keep the following in mind:

- **Skip system files:** CrashPlan Pro can't restore your computer to a bootable state, even if you back up every single file. So save yourself time and space. Include only your home folder and any other personal files or applications you can't easily reinstall.
- **Watch the destination folder:** If you're backing up to another computer, make sure that computer has its default location (in the General view of the Settings pane) set to a location *other than* the CrashPlan application itself, such as the `~/Documents` folder.
- **Here, there, and everywhere:** You can back up your Mac to more than one destination—another computer you own, a friend's computer, or (for an extra fee) CrashPlan's servers. (Consider buying an extra hard drive and asking a friend to keep it hooked up to her computer to serve as a destination for your backups without using up your friend's valuable disk space.) Use multiple destinations, if possible, for extra data protection.

### Data Backup Tips

Data Backup users, be aware of the following:

- **Use Versioned Backups:** Data Backup has lots of backup types; the one that stores multiple versions of each file is the Versioned Backup. Use Clone for bootable duplicates.
- **Compress and encrypt:** You have nothing to lose and everything to gain—in terms of disk space savings and security—by using Data Backup's compression and encryption options. Check both Compress Files and Encrypt in the Destination Options section of Data Backup's main window. (Note that although you

## CREATE A BOOTABLE DUPLICATE

Along with archives, bootable duplicates are one of the key pillars of a complete backup plan. They let you get back to work almost instantly in the event of a hard drive failure. Plus, they give you a useful troubleshooting tool (start up from the duplicate to run a repair utility on your main disk, for instance) and make upgrading to a new version of Mac OS X safer.

You can't make a bootable duplicate by copying files in the Finder; you must use a utility that knows how to do all the special low-level stuff required to make a backup bootable. Lots of programs can do this (including Retrospect and Data Backup), but I want to focus on just two—SuperDuper and Carbon Copy Cloner—both of which perform just this one task but do it easily and effectively.

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**Warning!** *Each duplicate must be stored on a separate volume (that is, a disk or partition). You cannot store duplicates of two drives on the same volume, even if you put them in separate folders—the result will not be bootable. Oh, and although I've said this a few times already, let me reiterate yet again: you cannot create a bootable duplicate onto a Time Capsule (or even an external drive connected to a Time Capsule) over a network.*

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SuperDuper and Carbon Copy Cloner can make one-off duplicates, but they can also be configured to run automatically on a schedule, updating the duplicate with just those files that are new or changed since the last run, and deleting files on the destination that are no longer on the source disk. I recommend updating your duplicate once a week, plus right before you install any Mac OS X update.

### Create a Duplicate with SuperDuper

SuperDuper has a well-deserved reputation for its ease of use and reliability. The software costs \$28 and is available from <http://www.shirt-pocket.com/SuperDuper/>; a free version lets you create duplicates but not update them incrementally. (And let me say the incremental update capability is well worth the price!)

To create a duplicate with SuperDuper, follow these steps:

1. Launch SuperDuper (**Figure 12**, next page).

## STORE AN EXTRA BACKUP OFFSITE

No matter how many backups you have or how often you update them, they do you no good if they disappear along with your computer—as they likely will in the case of theft, fire, or any other serious disaster. I urge everyone to take the precautionary step of keeping a second copy of their backups safely away from their computer—preferably in another building altogether. You can do this with a second hard drive, with an Internet backup service, or with a service called Transport, which combines Time Capsule and offsite backups.

### Use a Second Hard Drive

If you purchase two hard drives, you can set each of them up the same way; then, back up to one drive for a week, switch to the other one, and take the first offsite. Repeat this rotation every week or so, and you'll be safe in the knowledge that if you lose your first backup, a second one is still available that's no more than a week out of date.

The safest way to keep multiple backup drives is to set them up separately. Configure one drive with partitions for duplicate and archives. Set up Time Machine (or another archiving program) and let it run; also create a bootable duplicate. Then disconnect the drive and repeat the entire procedure with a second drive. If you use Time Machine, when you switch between drives, you need to tell it which disk to use now; see [Use Multiple Backup Disks with a Single Mac](#).

If you use a Time Capsule, you can't just swap out its internal drive whenever you feel like it (it's a pain to do, and it voids the warranty). You can, however, keep your backups on an external USB 2.0 drive connected to your Time Capsule and swap *that* drive from time to time—perhaps reserving the internal drive for media sharing.

### Use an Internet Backup Service

A second drive can be expensive, and all that swapping and relocating drives can be a hassle. A different approach is to store your secondary backup online, using any of several Internet backup services that offer encrypted backups of large amounts of data at reasonable prices.

## WHAT TO DO WHEN DISASTER STRIKES

You've diligently performed the backups I recommend in this book, and then, one fateful day, disaster strikes. It might be a small disaster (some important file is missing) or a large one (your whole computer is missing). In any case, the very first thing you should do is take a deep breath and remind yourself that everything is going to be fine. Once you're finished not panicking, proceed with the instructions here, depending on the nature of your disaster.

### Restore Individual Files

The easiest problem to recover from is a small number of files that are missing, or for which you need an older version. Follow these steps:

1. If you backed up the files using Time Machine, try restoring them following the instructions in [Restore Data with Time Machine](#). If you used another archiving program, follow the developer's instructions (check the Help menu) for restoring the files.
2. If the files are missing from your archive, check your bootable duplicate. Connect the drive (if it's not already attached) and navigate to the location on the disk where the file should be. If it's there, copy it to your main disk.
3. If Steps 1 and 2 don't work—for example if your entire backup drive is missing—move on to your secondary backup. That may mean fetching an extra backup drive from another location and following Steps 1 and 2 again, or using your Internet backup program to find the file in your online archive.

### Use Your Bootable Duplicate

In some situations it's clear that your problem is worse than a few missing files. If your computer won't start up, getting stuck at a blue or gray screen or displaying a flashing question mark icon, turn to your bootable duplicate. Also use your duplicate if many files seem to be missing or damaged, applications won't launch, or your Mac exhibits other similar system-wide misbehavior. Follow these steps:

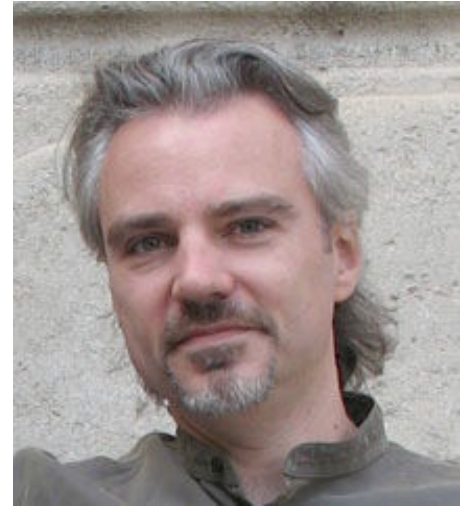
1. Attach the drive containing your bootable duplicate. (Remember, it must be directly attached to your computer—you can't boot from a duplicate over a network.)

## ABOUT THIS BOOK

Thank you for purchasing this Take Control book. We hope you find it both useful and enjoyable to read. We welcome your comments at [tc-comments@tidbits.com](mailto:tc-comments@tidbits.com). Keep reading in this section to learn more about the author, the Take Control series, and the publisher.

### About the Author

Joe Kissell is Senior Editor of *TidBITS*, a weekly electronic newsletter about the Macintosh and the Internet, and the author of numerous print and electronic books about Macintosh software, including *Take Control of Upgrading to Leopard*, *Take Control of Running Windows on a Mac*, and *Take Control of Apple Mail in Leopard*. He's also a frequent contributor to *Macworld*. Joe has worked in the Mac software industry for over 10 years, including positions managing software development for Nisus Software and Kensington Technology Group. He also helps run an Internet publishing business called alt concepts (<http://alt.cc/>).



In his increasingly imaginary spare time, Joe likes to travel, cook, and practice t'ai chi. He lives in Paris with his wife, Morgen Jahnke, and their cat, Zora. To contact Joe about this book, send him email at [jwk@mac.com](mailto:jwk@mac.com) and be sure to include the words **Take Control of Easy Backups in Leopard** in the subject of your message.

### Author's Acknowledgements

I appreciate Jeff Carlson's fine editing work and insightful suggestions, especially considering the numerous other projects that he was juggling at the time. Adam and Tonya Engst provided their usual outstanding support and encouragement. And a big thank you to Apple for validating what I've been saying for years about the crucial importance of archives!

## Shameless Plugs

Although I write about computers as my day job, I have a great many other interests, which I write about on several Web sites, including [Interesting Thing of the Day](#), [Truffles for Breakfast](#), and [I Am Joe's Blog](#). You can find links to all my sites, a complete list of my publications, and more personal details about me at <http://joekissell.com/>.

## About the Publisher

Publishers Adam and Tonya Engst have been publishing content about the Macintosh and the Internet since they first created their online newsletter, *TidBITS*, in 1990. At the *TidBITS* Web site you can read news, reviews, opinions, and more (<http://www.tidbits.com/>).



Adam and Tonya are known in the Mac world as writers, editors, and speakers. They are also parents to Tristan, who thinks ebooks about clipper ships and castles would be cool.



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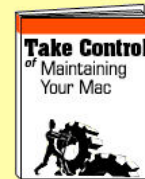


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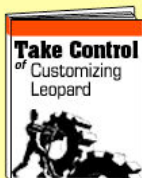


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