

Backup Strategies for the



Appraiser

*Be Prepared for Every "What If" Disaster
and Keep Your Business Up and Running*

*Improve Your Workflow by Making Your
Backup Files Work For You Everyday*

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Introduction

Backup Strategies for the ClickFORMS Appraiser

Like any professional that relies on the computer data you create and store, the loss of that data can be a tremendous waste of time and money, not to mention missed deadlines and damage to your reputation. It's important to have timely backups that can have you back in business in the shortest amount of time, and as close to the moment the data was lost or corrupted.

It's often said that hard drive failure and data loss is not a matter of "if" but rather "when" it will occur. Developing a backup strategy that accomplishes the goal of recovering all your data to the moment of loss is a balancing of speed, completeness and security. Which devices and services you utilize is all a matter of budget and your ability to imagine "what if..." scenarios and disasters.

Questions to ask yourself about your backup plan:

- Do you have backups of all critical data?
- Are your backups automatic and capable of bringing you back to nearly the moment of data loss?
- Do you have secure backups in remote locations?
- Are your backups contributing efficiencies to your daily workflow?



Backup Devices and Services

External Drives

The most common choice for a backup product is an external hard drive that is attached to your desktop computer and used to routinely backup the internal hard drive. These drives are inexpensive and offer fast, complete backup of all the data on the drive. It is recommended to have at least one of these external drives backing up your data. A short backup interval of an hour or less will ensure that your backup is not too far behind your current production. If you're only backing up at the end of the day, you have to ask yourself, "Can I lose a day's work?"

Pros: Inexpensive, fast and large capacity drives make complete backups possible.

Cons: These drives are usually in the same location as the computer and physically connected to the computer. Both are at risk in the case of a fire or natural disaster, theft or computer hardware problems such as power surges that can wipe out both internal drives and external backup drives simultaneously.

CDs

Burning CDs used to be a way to secure data for long term storage and the blank CDs were relatively inexpensive. However, this media is simply not a viable backup solution and computer manufacturers have largely stopped including CD/DVD drives in their computers.

Removable Flash Drives

These small "thumb" drives are readily available and inexpensive. They're extremely popular for transferring files from one device or user to another. In terms of their use in a complete backup strategy, while quick and easy to use, they are expensive on a per megabyte basis when compared to an external hard drives.

Pros: Small and easy to use. Easy to store and transport.

Cons: Usually too limited in size for backups and relatively expensive per megabyte.

Personal Cloud Storage (wifi Hard Drive)

Like online cloud storage solutions, these drives provide file sharing and syncing while maintaining greater control of the hardware used. These devices are not physically connected to the desktop or laptop computer and this separation can save them from power surges or other disasters and theft that befall the main computer system. They do require more setup, are more costly and are another piece of hardware to maintain.

Pros: Can be set up in remote locations and easier to share than connected hard drives.

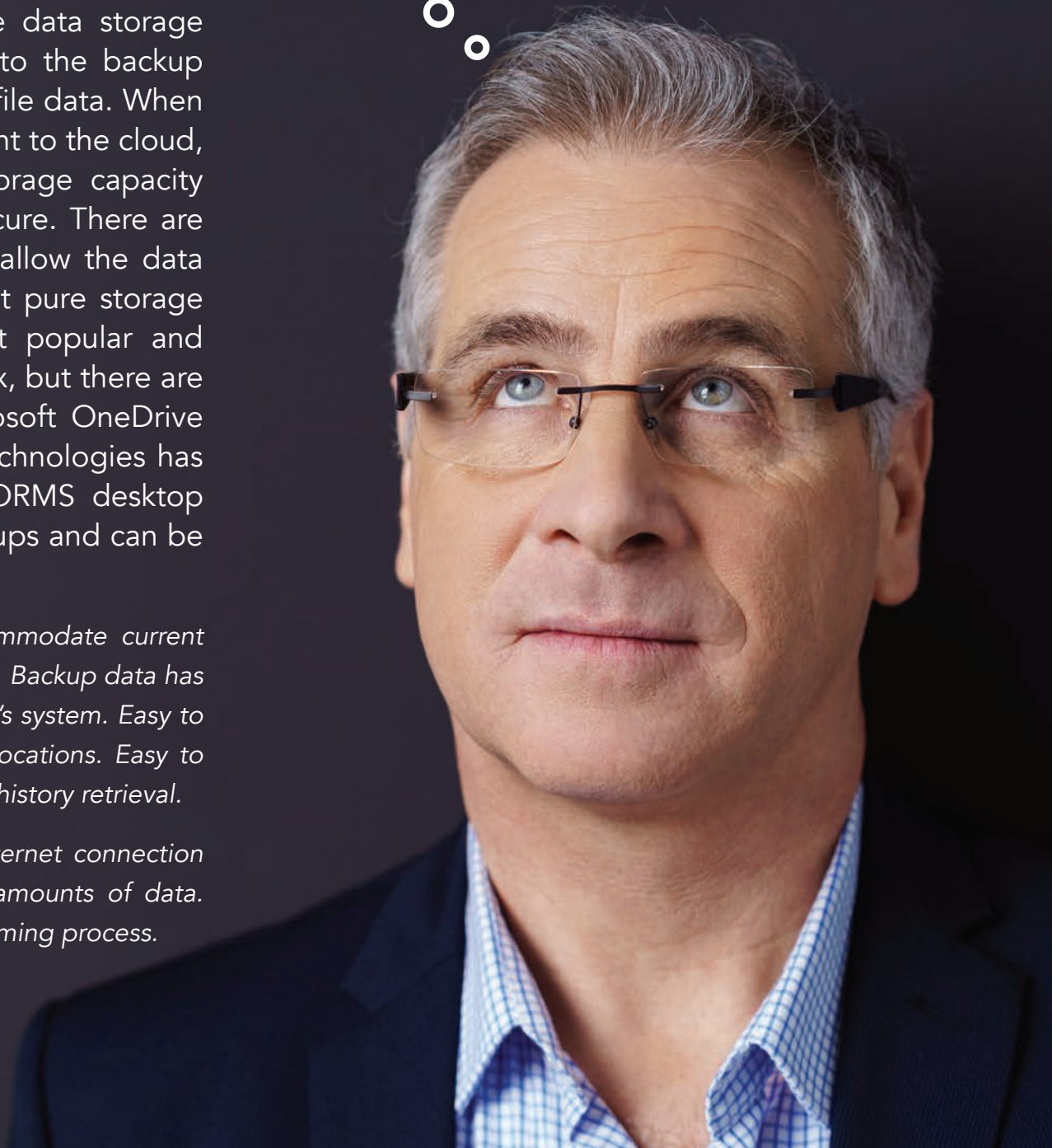
Cons: More hardware that you must maintain and yet another hard drive that will eventually fail. Remote access relies on your internet connection and speed.

Online Cloud Service

Sending your data over the Internet to an online server for back up and sharing is known as Cloud or Online Hosting. It is perhaps the most convenient offsite data storage solution that requires very little thought to the backup process and provides highly synchronized file data. When you make a change to a file, that data is sent to the cloud, mirroring your hard drive's data. The storage capacity is easily scalable to your needs and is secure. There are additional benefits to cloud storage that allow the data to be an active part of your workflow that pure storage solutions cannot offer. One of the most popular and efficient cloud storage solutions is Dropbox, but there are other solutions as well (Carbonite®, Microsoft OneDrive and Box, just to name a few). Bradford Technologies has recently integrated Dropbox into ClickFORMS desktop and ClickFORMS online for effortless backups and can be an integral part of Team Appraising™.

Pros: Secure, off-site storage. Scalable to accommodate current data storage needs. No maintenance of hardware. Backup data has redundancies and is backed up within the vendor's system. Easy to share files with others or access them in other locations. Easy to maintain up-to-date backups and provide version history retrieval.

Cons: Data transfer rates are limited by your internet connection speed and can slow the transmission of large amounts of data. Recovery of large hard drives can be a time consuming process.



Your Backup Plan

Which Storage Device/Service Should I Use

When deciding upon a backup strategy and which backup media or services to use, the best and easiest answer is that a mix is better. Like the old adage, don't put all your eggs in one basket; you don't want to rely on a single medium for data backup to protect you against all the various dangers that can present themselves to your data storage solution. You also want to balance the speed to create and recover your data with ease-of-use and automated actions to backup, as well as the security of the data, and cost. We've all seen news reports of weather and fire related natural disasters to know that you need to consider the physical location of the data medium. Your office backups are vulnerable to the same disaster that may take out your main computer system. Cloud storage provides you with needed offsite backups. While you may not know where the servers for a cloud storage provider are, you can generally assume they are some distance from your home or office.

An easy to administer plan would mix external hard drives with a cloud storage provider. One plan that we have found to be particularly easy to keep track of is the use of two or more external hard drives and a Dropbox Cloud Storage account. This combination gives you complete backup of your entire hard drive that is fast and easy to access. By rotating two or more external hard drives, you

provide another level of protection against hardware failures that can result from the simultaneous failure of internal and attached external hard drives. This rotation of external hard drives can happen on any interval you choose. Weekly is easy to remember, but the rotation interval is up to you. It is advisable to store the rotated out hard drive in another location. If you work out of an office, store the rotated drive at your home. If your appraisal office is in your home, store the rotated drive at another family member's house, your car or anywhere

You need to consider the physical location of your backup files

that would safely keep it from being affected by the same disaster such as fire, flood, theft, etc. If that isn't practical, perhaps a fire and flood rated safe will provide a level of protection. These external hard drives should be at a minimum the size of your computer's internal hard drive. You will want to back up the entire drive to these external hard drive back ups. There are variations to rotating the actual drives. One such procedure is to use external drive docking stations. One drive can be consistently used as a back up and then on regular intervals a second drive is placed in the dock to duplicate or clone the first.

The Cloud Advantage

The addition of a Dropbox cloud storage account to your backup strategy provides you with an offsite solution that synchronizes with the files on your local hard drive. The instant you save the file to your hard drive (in the designated folder), the data is duplicated to your cloud storage. This action is seamless and you never have to actively backup your data. As long as your internet connection is active, it will keep the data in sync. If you're working from your laptop or mobile device and do not have an active connection, you can continue to work and Dropbox will sync the files when you have a connection again. This is different from a cloud only solution that would prevent you from working if you cannot connect to your cloud account.

In addition to the backed up file, Dropbox will retain a history of your saved versions. This can be a real lifesaver if you accidentally overwrite a file or a file becomes

corrupted along the way. You can retrieve previous versions of the file and be back in business quickly.

One of the main features of Dropbox is the sync feature that will allow you to work with multiple computers and keep the file data synchronized between those computers. Many appraisers have multiple computers – a desktop and laptop for instance. With Dropbox, the files are updated on all your computers running the same Dropbox account. So a change made on your desktop file will be sent to your cloud storage and then sync'd to your laptop. This is where Dropbox excels over your other backup media. The sync'd and shared file functions will add efficiencies to your appraisal workflow. No more emailing files or running thumb drives between computers. Changes made on one device are instantly made to all devices using that Dropbox account or shared folder.

Using Dropbox in Your Appraisal Office for Backups and More

- Sync your data across multiple devices
- Share your files with other teammates
- Revert or recover your files from a previous state
- Remote wipe of data from lost or stolen devices

Using Dropbox in your appraisal office allows for easy-to-use, reliable backups and adds the benefits of cloud storage that makes your files available to you and your team from anywhere without having to transfer or manipulate the files to be accessible.

Data Security

Keeping Your Work, Your Data Safe



While maintaining reliable backups is important to safeguard against the loss of your primary data storage device, securing access to your data may also be of high concern to you. Onsite data can be secured in a safe or rotated offsite, but realistically, most home burglars wouldn't know what to do with your appraisal data anyway. It's the breach or use of your online data that concerns most people.

Most cloud storage companies have highly secure storage facilities and encryption to safeguard your data. Dropbox uses segmented data in separate facilities to further stymie any hacker's attempts at getting your data intact. (Hackers would have to access multiple sites and decrypt the data and put it back together to gain access.)

Dropbox has remote wipe capabilities to delete data from devices you no longer control. If you ever have a laptop stolen or lost in the field, you can simply send a remote delete command and the data will be erased the next time the device comes online. This feature also

works for revoking access to employees that are no longer part of your appraisal team, giving you greater control of your data.

With the ClickFORMS integration of Dropbox, Bradford Technologies cannot access your data. We simply facilitate an easier way for you to save and retrieve your files in the Dropbox system while you're working in ClickFORMS. It's your work, your data and you store it wherever you would like.

Online data sources may be breached, but more likely you've given access to the data in exchange for use of some service. Most third party vendors outside the mortgage and real estate industry probably have no interest in your data. Those in the industry may have some vested interest in the data you have collected. Reading your terms and privacy policies with the companies you deal with will give you an idea of the level of data accessed and perhaps what they will use that data for or who they will share it with.

Put Your Backup to Work

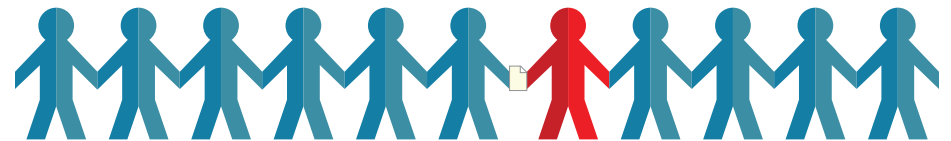
Create New Efficiencies While Also Backing Up

Traditionally, backups have been like car insurance. You pay and pay, but if you avoid having an accident, you never have to use it. External hard drive backups can feel like they are working this way. You buy them, attach them and hopefully never have to access them, but they don't do anything for you when everything is working fine.

- *Eliminate File Version Conflicts*
- *Avoid Duplication of Files*
- *No More Email Attachments*
- *Stop Sharing Thumb Drives*
- *Access Files from Anywhere*

Working with a cloud storage solution like Dropbox, you're able to extend the functionality of your stored data in ways that you simply cannot with an attached hard drive. With Dropbox, your cloud drive allows your data to instantly backup as you would expect, but also move with you as you switch devices and work with colleagues, recover from errors large and small, provide security and control over your data even if you lose control of the hardware. Your "backup" data actually becomes part of your appraisal workflow.

Dropbox works by keeping data on the local drive and reflecting or syncing that data to your cloud storage drive automatically. Unlike some cloud storage solutions that only allow you to keep your data in the cloud, Dropbox allows your data to be simultaneously on your local drive and the cloud. This allows you to work faster (you're not waiting for data to move across the internet) and to work without an internet connection. Your data is not only synchronized from your computer and the cloud, but all your devices can have the sync'd data. Move seamlessly from your desktop to your laptop without emailing the file to yourself or carrying a vulnerable thumb drive around.



Sharing Effortlessly to Increase Productivity

Just as you can effortlessly move from your desktop to your laptop, the data can be shared with another user such as your office assistant or other personnel in the office. Files can be started with ClickFORMS Online at home, opened on a laptop in another location and completed using a desktop computer at the office. Any workflow that the team finds advantageous without the inefficiencies of moving files by email or physical drives.

Avoid Duplication and Version Errors

If you're emailing files to yourself or teammates you've probably encountered a situation where you're not sure if you have the most current version or you're working on a different version of the file. Getting out of sync with work completed is a tremendous waste of time. By working on a single file that is stored, automatically synchronized with your drive and instantly shared with others avoids duplicating or losing work. A cloud file that also acts as your working backup virtually eliminates these sorts of file version control errors and gives you the peace of mind knowing your data is current, secure and backed up.



Greater Efficiencies for Team Appraising

Cloud storage and sharing offers advantages that were previously available only to larger computer networks. Now you can have an easy to administer network to work as a team without the effort or expense of traditional networks. Adding even further functionality, traditional networks were still presented with the challenge of backing up data and sharing outside the hardwired connections. Now the cloud is your network and your backup at the same time. This levels the playing field for smaller appraisal firms.

Bradford Technologies has launched ClickFORMS Online. By using your Dropbox account connected to your ClickFORMS Online account, you now can access your files from any computer, anywhere. And those that work with you on your reports can access those same files without having to install the desktop version on their computers. An example workflow would have an assistant start a report with ClickFORMS Online from their virtual office, an appraiser in the field conducts the inspection with Inspect-a-Lot, the ClickFORMS mobile application, and then an appraiser completes the report from home on his laptop – all working from the cloud in real time and all the while these active files are being backed up with the most up-to-date information being input into the report. You're more efficient and better protected from data media failures.

Go Back and Retrieve Past Versions

Ever find that your file was written to a corrupted area of the drive or forgot to duplicate a file before using it as a template? The problem with external hard drive backups is that they often overwrite previous versions with the new corrupted file. With Dropbox, everytime you save it is like a snapshot in time. You can simply retrieve the file from an earlier time before the file was corrupted and continue working without having to recreate the data.

Summary

The key to building a successful backup strategy is to make it simple enough to use, yet robust enough to handle any number of catastrophic events that might compromise your data and ability to complete your work. A balance of time, completeness and cost are issues to consider in choosing the right mix of products and services. Is your backup media part of your regular workflow or for recovery purposes only? Who has access to your data, what do they use it for and other privacy issues are also thoughtful considerations for your data backup plan.

Effective Backup Strategy Should Include:

- Automatic and timely backups of all critical data
- Secure backups in remote locations
- Added efficiencies that allow for remote access and easy sharing with others in the office

While the basics of a successful backup have not changed, the media used and the role they play in our daily workflow certainly have. If you have not changed how you backup your computer in the last 5+ years, perhaps it is time to reevaluate your backup strategy to see if there are ways to improve your procedures that give you greater security, more timely backups, and improved productivity and efficiency with time saved.

At Bradford Technologies, we've been actively facilitating the backup of your ClickFORMS files for years. ClickFORMS has automatically generated duplicate files with the suffix .BAK, that have saved many appraisers from having to recreate hours of work. Now we're embracing strategies that allow for local as well as cloud backups to further create a safety net for your appraisal data and provide new opportunities for you to further increase your office productivity.

Support Links

How to install Dropbox
support.bradfordsoftware.com/db1

Using Dropbox with ClickFORMS
support.bradfordsoftware.com/db2

Need Help?

If you need help creating a successful backup plan, contact the Bradford Technologies Tech Support Team at **800-622-8727** or **support@bradfordsoftware.com**. It's far easier to help you now rather than try to rebuild your files after some media failure or loss.



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