

# CXproHD Site Backup Utility USER GUIDE



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### **CXproHD Site Backup Utility** (MAN0137 rev 2)

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UniPut™ technology is covered by UK Patent GB 2 400 991 and Irish Patent 84413



[www.cylon.com](http://www.cylon.com)

**Style conventions used in this document:**

**UI Text:** Text that represents elements of the UI such as button names, menu options etc is presented with a grey background and border, in Tahoma font which is traditionally used in Windows UIs. For example:

Ok

**Standard Terms (Jargon):** Text that is not English Language but instead refers to industry standard concepts such as Strategy, BACnet, or Analog Input is represented in slightly condensed font. For example:

BACnet

**Code:** Text that represents File paths, Code snippets or text file configuration settings is presented in fixed-width font, with a grey background and border. For example:

```
$config_file = c:\CYLON\settings\config.txt
```

**Parameter values:** Text that represents values to be entered into UI fields, or displayed in dialogs is represented in fixed-width font with a shaded background. For example

10°C

**Product Names:** Text that represents a product name is represented in bold coloured text. For example

**CBX-8R8-H**

**PC Keyboard keys:** Text representing an instruction to press a particular key on the keyboard is enclosed in square brackets and in bold font. For example:

**[Ctrl]+[1]**

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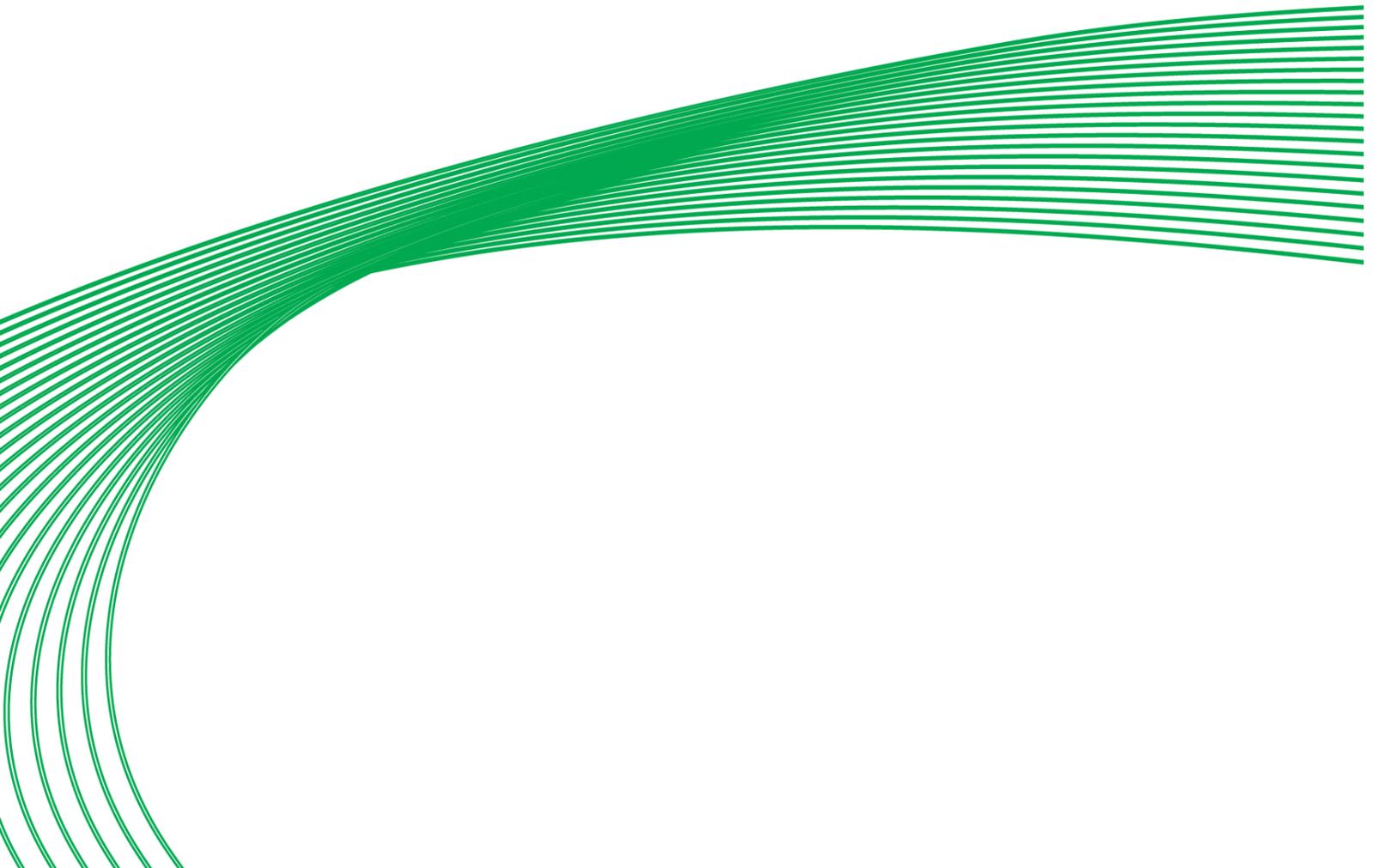
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# SECTION 1 : INTRODUCTION



## WHAT IS THE CXpro<sup>HD</sup> SITE BACKUP UTILITY?

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The **CXpro<sup>HD</sup> Site Backup Utility** (sometimes referred to as **Backup**) is a module of the **Cylon software suite**.

The **Cylon** system consists of hardware controllers linked together to form a 'Site', and software on a Supervisory PC. The **Cylon** software on the PC supervising the **Cylon** hardware uses data files, which are organised on the PC in a directory structure representing the structure of the Site.

**Backup** allows this directory structure, and any other relevant files to be archived, so that it can be installed on another PC, or restored to the original PC.

The main uses of the **Site Backup Utility** are:

## COPYING A SITE TO ANOTHER PC

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For instance, if an engineer needs to visit a site, and needs to transfer site files (perhaps from the office PC to a laptop, or from a laptop to a site's supervisory PC) the files required for the site can be copied between PCs using this utility.

## SYNCHRONISING MODIFICATIONS TO A SITE

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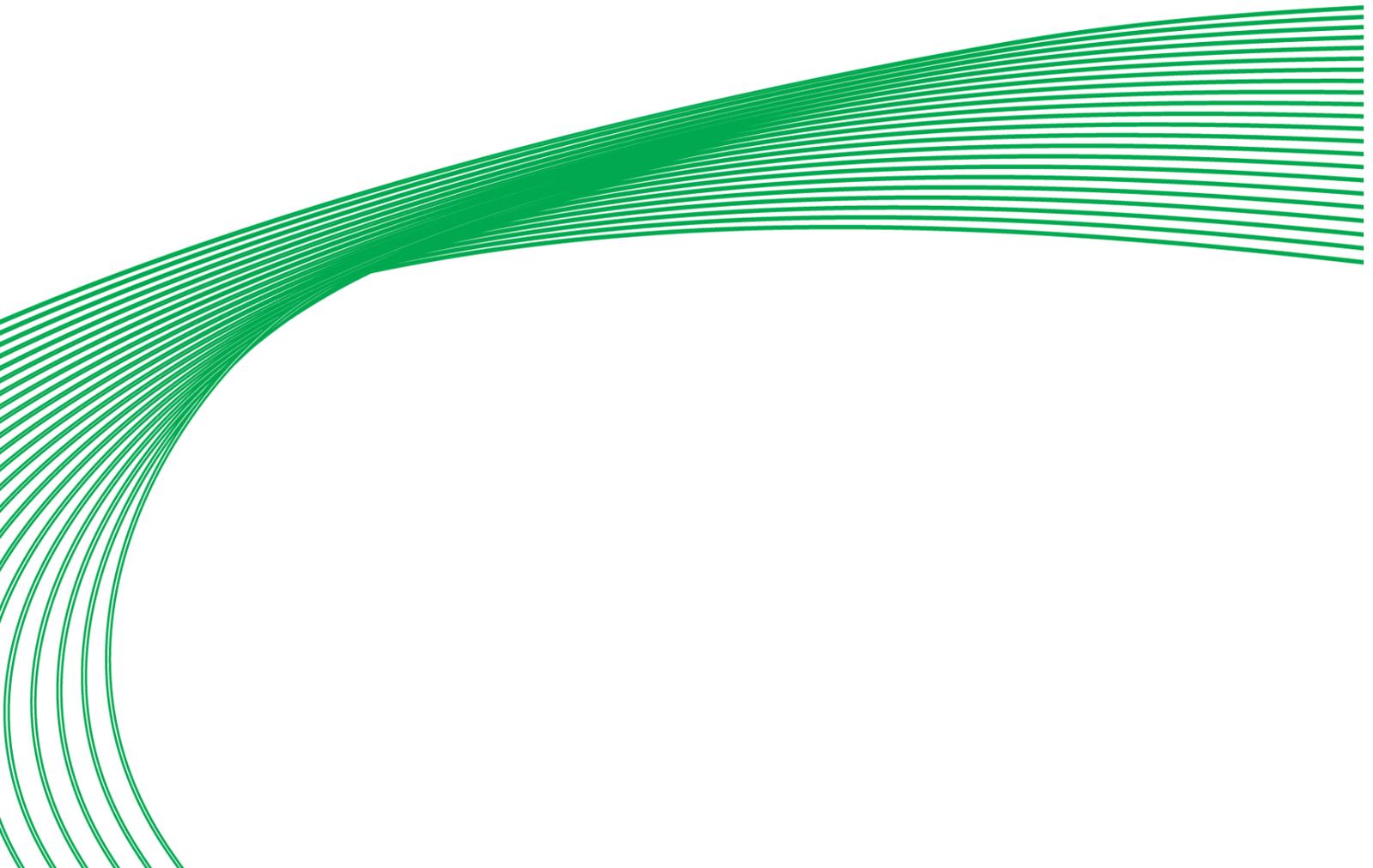
Several people may be working on different parts of a site, using separate PCs to modify strategies, globals and drawings. It is necessary at some time to compile all the changes into one copy of the site, on the site's supervisory PC. Using the **Site Backup Utility** it is possible to transfer only the modified files from each PC, and so synchronize all the changes on the main PC.

## MAKING A SECURITY COPY OF THE SITE

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For security in case of damage to a supervisory PC, or its files, it is usually a good idea to keep a backup of the full site, which can be restored to the original PC, or replacement PC if required.

# SECTION 2 : USING THE SITE BACKUP UTILITY



When the **CXpro<sup>HD</sup> Site Backup Utility (Backup)** is started, the **Backup** Interface (*see page 26*) is displayed. From the Menus and Toolbar Icons in the interface, all of the options in the **Site Backup Utility** can be accessed.

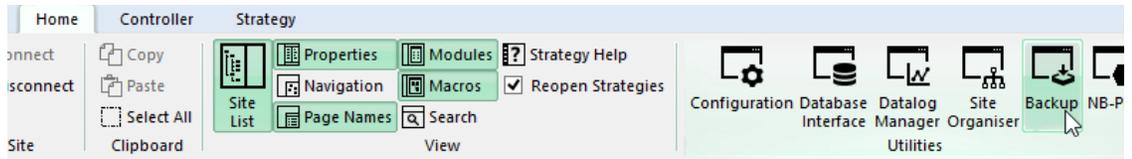
These options include:

- Backing up a site (*see page 10*)
- Restoring a site (*see page 16*)
- Viewing the contents of an existing backup (*see page 19*)
- Changing the current default site (*see page 9*)

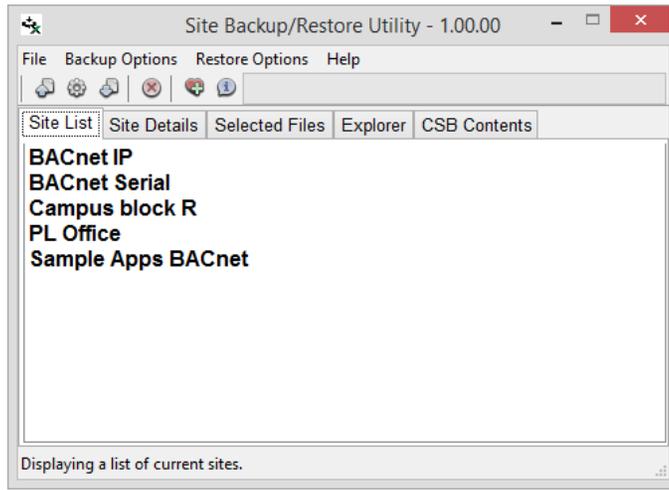
**Note:** **CXpro<sup>HD</sup>** does not need to be running when you use the **Site Backup Utility**. However, **CXpro<sup>HD</sup>** must be installed on the PC, otherwise there would be no site structure for the **Site Backup Utility** to operate in.

## STARTING BACKUP

To start **Backup**, select its icon from the **Utilities** group in the **Home** tab of the **Cxpro<sup>HD</sup>** Ribbon :



This opens the **Backup** window.



## BACKING UP A SITE

'Backing Up' a site means copying some or all of the files associated with the site into a compressed **Backup** (".csb") file. The compressed file can either be stored, so that the site can be repaired if it becomes damaged on the original PC, or transferred to another PC, so that a duplicate of the site can be made. This can be used to set up a portable PC for a site visit, or to synchronize modifications made to a site on several PCs.

It is possible to back up a complete site, or parts of a **site**. For this reason, before a site can be backed up, it must first be prepared for backup i.e. you must set the Backup options, and select the files and directories to be backed up.

To back up a site, follow these steps:

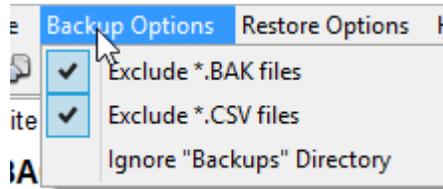
- Set the **Backup options**
- Select the **Directories and Files** to be backed up
- **Run** the Backup.

### Setting the required Backup options

It is possible to change the criteria that the **Backup** utility will use when preparing a site for backup (i.e. selecting the files to be included in the .csb file).

You can either:

- Select the required items from the **Backup Options** menu.



or,

- From the toolbar select the fifth button **Select backup/restore options**



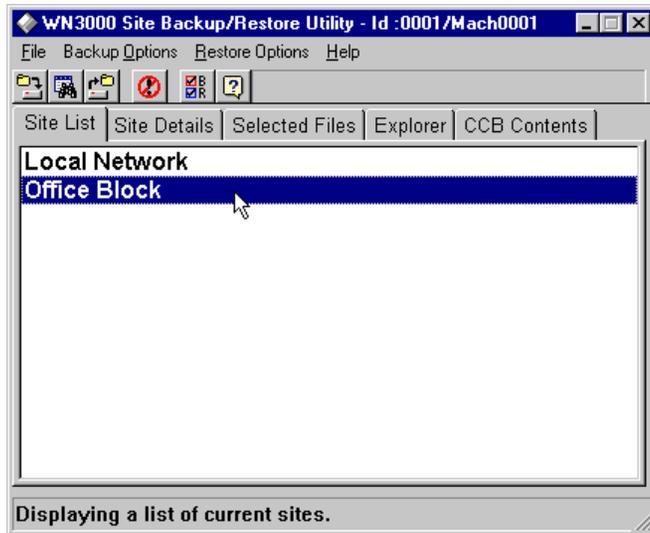
then from the displayed **Select Backup/Restore Options** dialog box select/deselect the required items. For details about the backup options, and how to use them, see *Backup Options* on page 15.

## Selecting the Files to be Backed Up

In order to create a backup of a site, you must first select the files to be included in the .csb file. This is known as 'preparing a site for backup'. The files are automatically selected based on the **Backup Options** (see *The Options dialog box* on page 34), but you can manually add or remove directories and files from the backup set.

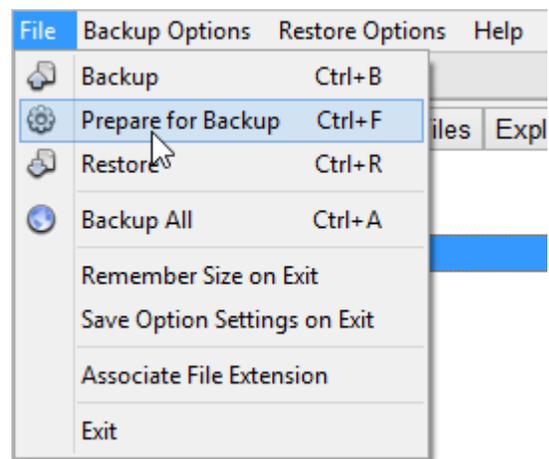
### To select the files and directories:

First select the site to be backed up by clicking on it in the Site List tab of **Backup**'s Details window:



Next, put the program in **Preparation** mode using one of the following methods:

- From the **File** Menu, select the **Prepare for Backup** menu item:



- From the toolbar select the second button **Prepare Site** for backup :



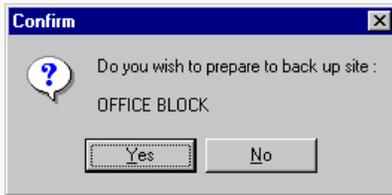
- Press [Ctrl] + [F] simultaneously on the keyboard

**Note:** If you select the Prepare for backup function without first selecting a site, the following message will appear:



When you press the **OK** button, the program will return to its previous state.

If a site is selected, a confirmation box will appear:

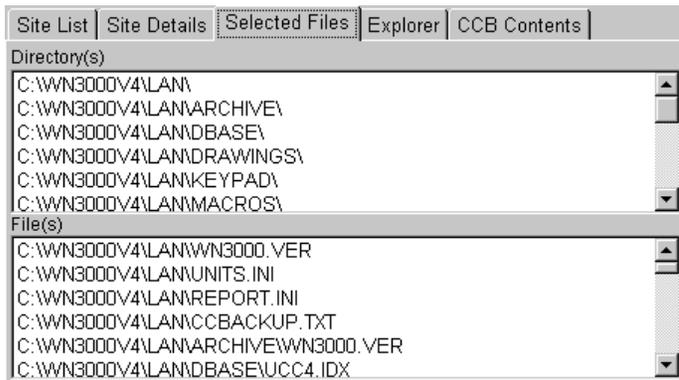


**Note:** The site contained in the message box will be the one selected from the site list and not necessarily "Office Block" as shown in the example above.

If you press the **No** button, the program will return back to its previous state.

If you press the **Yes** button, the Details Window will change to the **Selected files** tab.

The directories and files required to back up the selected site will appear in the two list boxes:



Once a site is displayed in the **Selected Files** tab, you can remove individual directory(s) or file(s) from the backup (see *Details Window - Selected Files tab* on page 32).

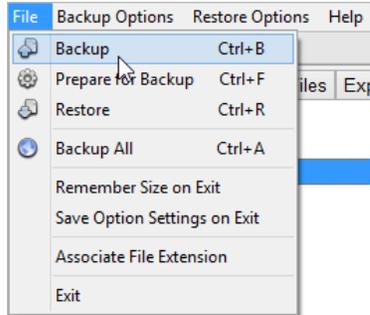
When the Selected Files tab displays all the directories and files to be backed up, you can proceed with running the Backup operation.

## Running a Site Backup

Once a site has been **prepared for a backup**, by setting the options (see page 10) and files (see page 11) to be archived, the backup can be carried out.

To start the backup, using one of the following methods:

- From the **File** menu select **Backup**,



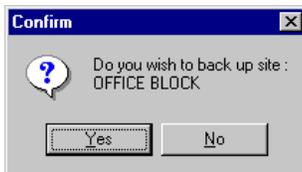
- From the toolbar select the first button, **Backup site**



- Press [Ctrl] + [B] simultaneously on the keyboard

**Note:** If you select one of the above options, and no site has been prepared for backup, the warning “You must prepare a site” will appear.

When any of the above options is selected, and a site has been properly prepared, the following message box will be displayed:



**Note:** The site contained in the message box will be the one selected from the sites list and not necessarily “Office Block” as shown in the example above.

If you press the **No** button, the program will return back to its previous state.

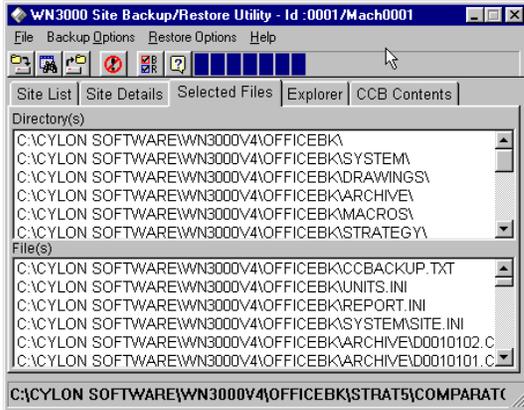
If you press the **Yes** button, the **Select File** dialogue box will open:



The **File name** text box will contain the current site description, which can be changed to any legitimate Windows file name. You can also change the destination to which the backup will be saved.

If you press the **Cancel** button, the program will return back to its previous state.

If you press the **Save** button, the program will create the required backup. During the backup process the program will continually update the status bar at the bottom of the window with the current file being processed and will update the progress bar at the top of the window as necessary



**Note:** The backup process can be cancelled at any time by selecting the fourth button on the toolbar “Cancel current operation”



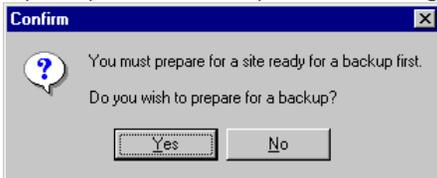
When the backup has been successfully completed, the following message will be displayed:



Press **OK** to return to the **Backup Interface**.

### If a site is not prepared...

If you try to run a backup without setting up properly, the following dialog will be displayed:



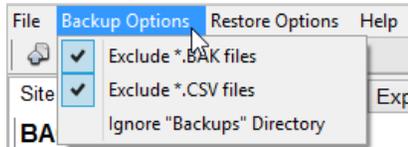
If you select **Yes**, the program will go into the **Prepare Site for Backup** procedure, so that you can select files for backup (see page 11).

You must also set the correct backup options (see page 10).

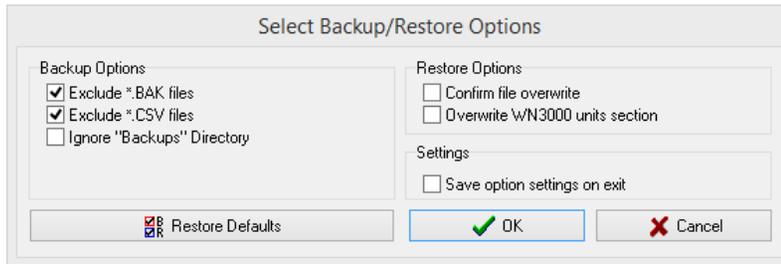
When the site is prepared, you can return to running the backup (see page 13).

## BACKUP OPTIONS

Each of the options below can be selected from the **Backup Options** menu,



or the **Select Backup/Restore Options** dialog box:



### Exclude \*.BAK files

Some programs, such as **CCView** can generate files, which are duplicates of other files, with the extension `.BAK`. These act as a 'safety measure' in case something goes wrong with the main file. They are not necessary to the operation of the site and so can be excluded from the site's backup in order to make the `.csb` file smaller, and save disk space.

When this item is selected then during a prepare for backup the program will check each file that it is adding to the **File(s)** list box to see if its file extension is `.BAK`, if it is then the program will not include the file in the **File(s)** list box.

### Exclude \*.CSV files

A site may contain `.CSV` files, which are archives storing historical data from datalogs in the site. This information is not required for the operation of the site, and so can be excluded from the backup in order to reduce the size of the `.csb` file, and save disk space.

When this item is selected then during a prepare for backup the program will check each file that it is adding to the **File(s)** list box to see if its file extension is `.CSV`, if it is then the program will not include the file in the **File(s)** list box.

## RESTORING A SITE

'Restoring' a site means copying files from a **Backup** compressed (.csb) file onto a PC to create or adjust a **Cylon** site. This can be carried out:

- on the PC that created the .csb file originally, to repair a damaged site, or
- on another PC, to create a duplicate site. This can be used to set up a portable PC for a site visit, or to synchronise modifications made to a site on several PCs.

A **Site Restore** operation can be carried out with different options, for instance overwriting existing files, or rebooting the computer on completion, so before running a Site Restore operation, you must set the **restore options**.

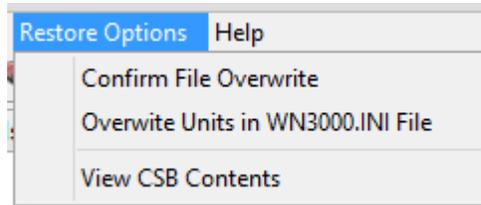
Also, before a **Site Restore** operation, you can view the contents of an existing backup (.csb) file, to check if it's the one you want to restore (*see page 19*).

When the restore options are set, and you have selected the correct .csb file, you can **run** a Restore site operation.

### Setting the required restore options

It is possible to select certain criteria that the program will use when restoring a site from a backup. There are two methods of selecting the required restore options:

- From the **Restore Options** menu select the required menu item(s)



or,

- From the toolbar select the fifth button **Select backup/restore options**



then from the displayed **Options dialog box** select/deselect the required items. For details see *Restore Options* on page 19.

## Running a Site Restore operation

To start to **Restore** a site, use one of the following methods

- From the **File** menu select **Restore**,
- From the toolbar select the third button, **Restore site**
- Press [Ctrl] + [R] simultaneously on the keyboard



If any of the above options is selected, the **Select files to Restore** dialog will appear:



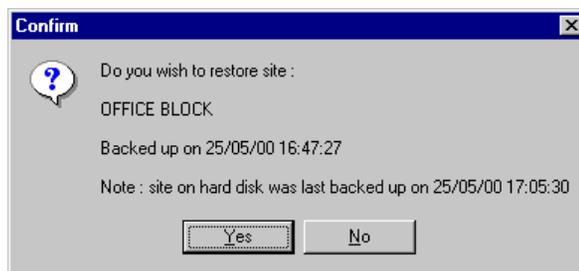
The dialogue box will list any current **Backup** type (.ccb) files in the selected directory. If the file you wish to restore is an older **Backup** type or a **Backsite** type then these can be selected from the **Files of type** drop down list box.

You can change the source directory listed in the dialog box by selecting from the **Look in** box, or by clicking on listed directories.

Select a file or enter the name of the file in the **File name** box.

If you press the **Cancel** button, the program will return back to its previous state.

If you press the **Open** button, the program will read the selected backup and the following message box will appear:

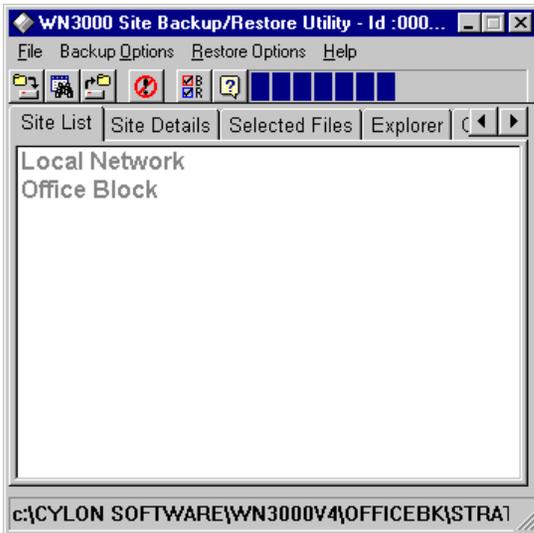


**Note:** The Site contained in the message box will be the one contained within the selected backup, and not necessarily the one shown above.

- If you press the **No** button, the program will return back to its previous state.
- If you press the **Yes** button, the program will restore the selected backup.

**Note:** If the .csb extension has been associated with the **Site Backup Utility** in the Windows operating system (see *Associate File Extension* on page 27), then when a file with a .csb extension is selected in **Windows Explorer**, **Backup** will run and automatically start the restore operation for the selected file.

During the restore process the program will continually update the status bar at the bottom of the window with the current file being processed and will update the progress bar at the top of the window to show how much of the process is complete.



**Note:** The backup process can be cancelled at any time by selecting the fourth button on the toolbar  
Cancel current operation .

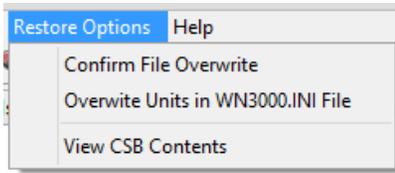


**Note:** If a restore is cancelled during its operation, then you should not use the site that was being restored. Some necessary files may be missing, leading to unpredictable results. If you need to work on the site, first re-run the restore operation, and allow it to finish without cancellation.

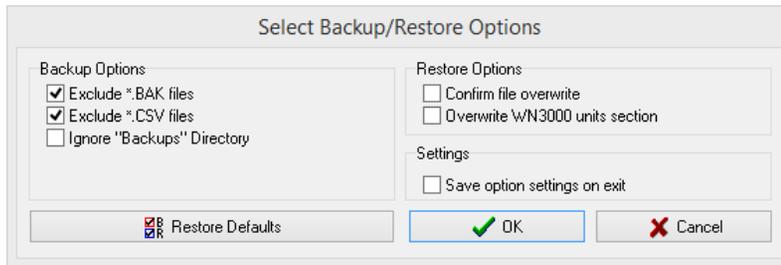
## RESTORE OPTIONS

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Each of the options below can be selected from the **Restore Options** menu,



or the **Select Backup/Restore Options** dialog box:



### Confirm file overwrite

When this item is selected then during a restore if a file currently exists on the hard disk of the machine the program ask if this file is to be overwritten.

### Overwrite WN3000 units section

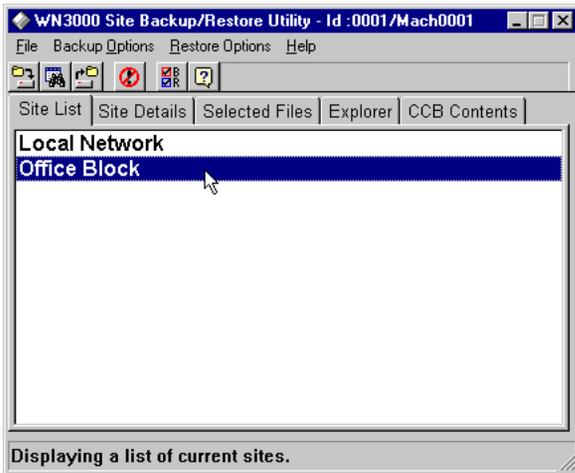
When this item is selected then after a restore the program will copy the contents of the UNITS.INI file contained within the restored projects sub-directory to the `WN3000.INI` file in the `UnitronUC32 System` directory, overwriting items where necessary.

## CHANGING THE CURRENT DEFAULT SITE

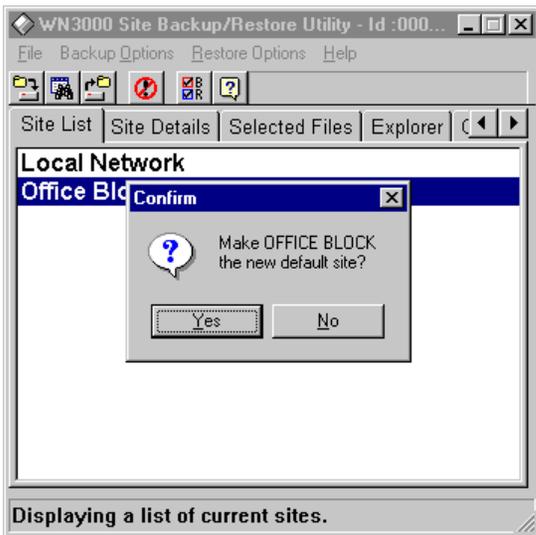
The “Default Site” is the site to which **CXpro<sup>HD</sup>** will connect when it is started. Usually, to change the **site** that **CXpro<sup>HD</sup>** will use as its default, you must start the software, change the default in the **Configuration Utility**, and then close the software and re-start it.

The **Site Backup Utility** has a facility to change the default **Site** for **CXpro<sup>HD</sup>**, whether or not the software is running.

To do this, right-click on the required site in the **Site Backup Utility**'s **Site List** tab.



The following message box will appear

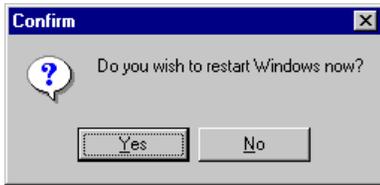


**Note:** The site contained in the message box will be the one selected and not necessarily the one shown above

If you press **No** the program will continue with the current operation.

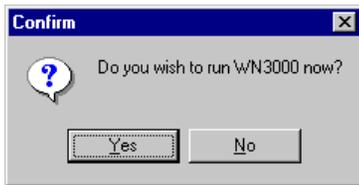
If you press **Yes** the program will make the selected site the current site, and will ask one of the following questions, depending on whether the **Cylon** software is currently running:

### If Cylon software is currently running



- If you press **No** the program will continue with the current operation.
- If you press **Yes** the program will restart **Windows** and then close.

### If Cylon software is not currently running



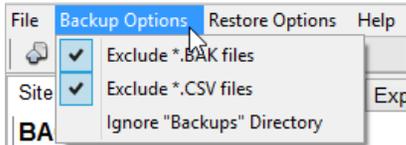
- If you press **No** the program will continue with the current operation.
- If you press **Yes** the program will start the Cylon software and then close.

**Note:** If the current site is changed when the **Cylon** software is currently running and **Windows** is not restarted then unpredictable results within the **Cylon** software may result.

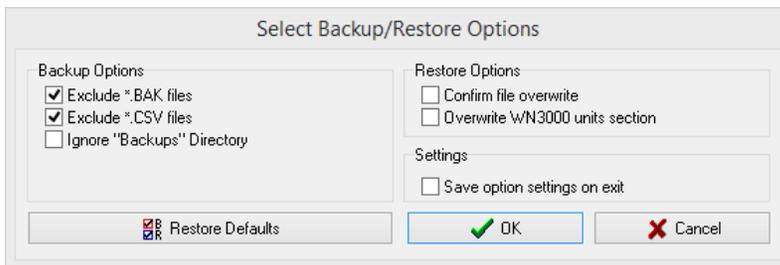
## SAVING THE OPTION SETTINGS

If the **Save Option Settings on Exit** option is set, the **Backup/Restore Options** settings will be stored when the program is closed. When the program is next opened, the settings will be automatically retrieved.

Each of the options below can be selected from the **Backup Options** menu,

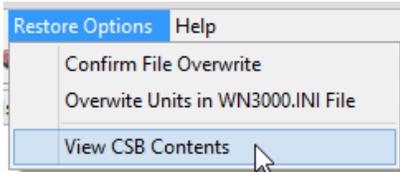


or the **Select Backup/Restore Options** dialog box:

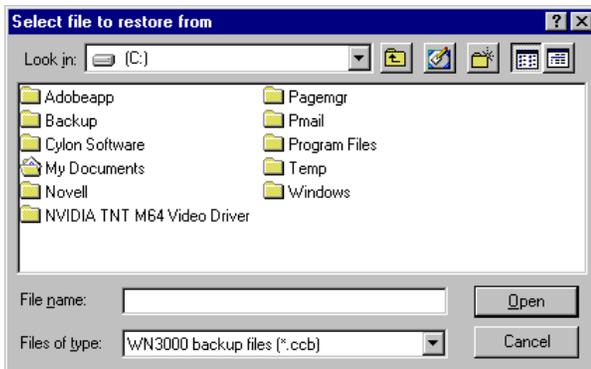


## VIEWING THE CONTENTS OF AN EXISTING BACKUP

The contents of a backup can be viewed by selecting the **View CCB Contents** menu item from the **Restore** menu.



The **Select file to restore from** dialog box will appear:



Select the file you want to view from the list of files. The name will appear in the **File Name** text box.

**Note:** The contents of an older **Backup** type or a Backsite-type backup can **not** be viewed.

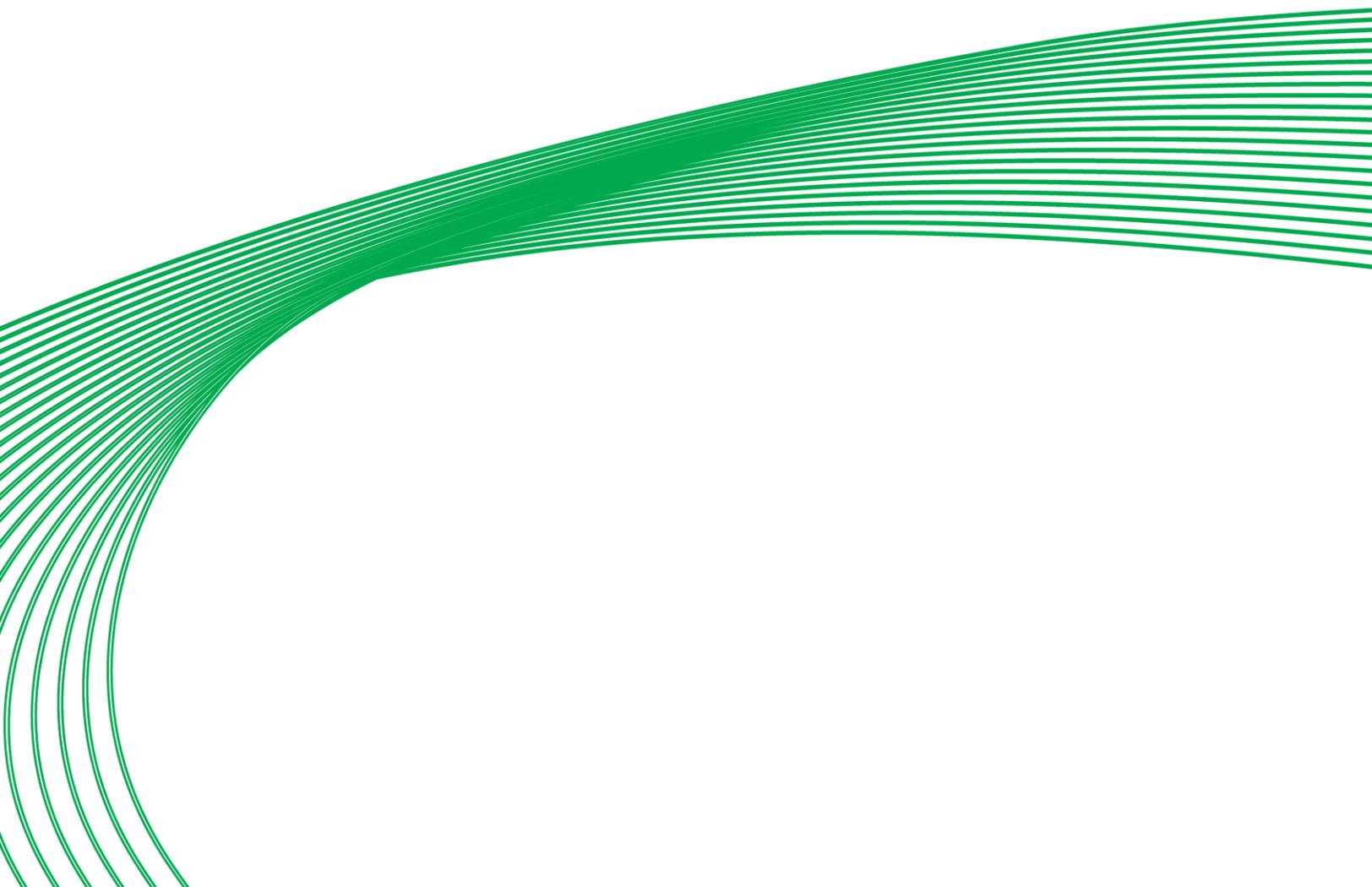
If you press the **Cancel** button, the program will return back to its previous state.

If you press the **Open** button, the details window will change to the **CCB Contents** tab and the files contained within the backup the selected site will appear in the list box:

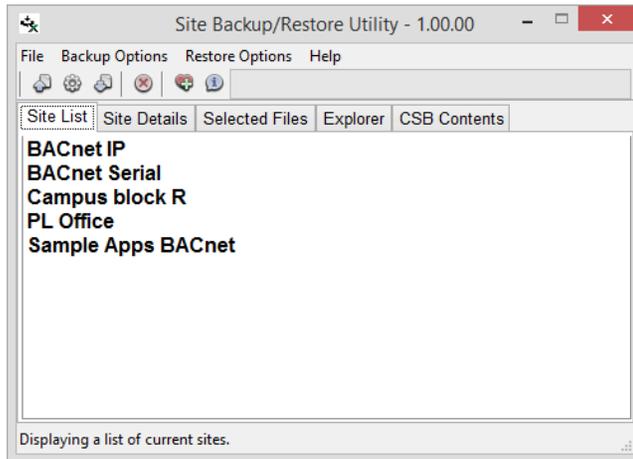




# SECTION 3 : THE SITE BACKUP UTILITY INTERFACE



The **Site Backup Utility** interface displays Menus, Toolbar Icons, and windows from which all of the **Site Backup Utility**'s functions can be accessed.



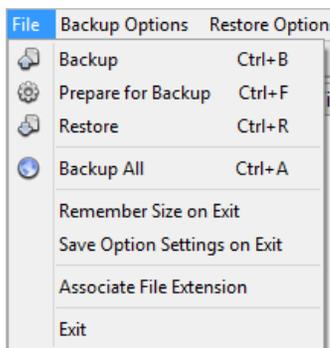
## THE MENU BAR

File Backup Options Restore Options Help

The **Menu Bar**, at the top of the **Site Backup Utility** interface, contains menus that give access to all **Backup**'s functions. To open a menu, click on its name in the menu bar.

### File menu

The file menu contains options that send information from and to files



#### Backup

Selecting this option from the **File** Menu starts the **Backup** operation (*see page 10*).

It is the equivalent of the **Backup** button on the toolbar, or pressing [Ctrl] + [B] on the PC's keyboard.

#### Prepare for Backup

Selecting this option from the **File** Menu starts the **Select files for backup** operation (*see page 11*).

It is the equivalent of the **Prepare for Backup** Button on the toolbar, or pressing **[Ctrl] + [F]** on the PC's keyboard.

#### Restore

Selecting this option from the **File** Menu starts the **Restore** operation (see page 16).

It is the equivalent of the **Restore** button on the toolbar, or pressing **[Ctrl] + [R]** on the PC's keyboard.

#### Remember Size on Exit

When this option is ticked on the **File** menu, the position of the **Site Backup Utility** on the PC screen will be stored when the program closes. When the program is next opened, it will appear in the same place on the screen as it was when the program was closed.

#### Save Option Settings on Exit

If this option is ticked on the **File** menu, the **Backup Options** settings will be stored when the program is closed. When the program is next opened, the settings will be automatically set.

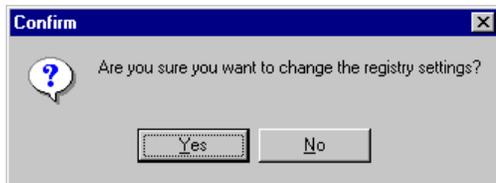
#### Exit

Selecting this option from the **File** menu closes the **Site Backup Utility**.

#### Associate File Extension

Selecting this option allows you to make an 'association' on your PC between the **.csb** filename extension and the **Site Backup Utility**. This means your PC will recognize that **.csb** files are to be opened with the **Site Backup Utility**.

When you select the **Associate File Extension** option from the **File** menu, the following message appears:



If you press **No**, the program will return to its previous state.

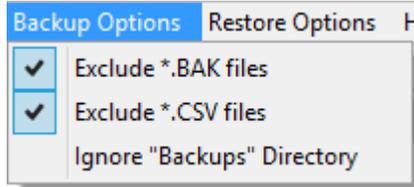
If you press **Yes**, the **Windows** registry will be changed to associate **.csb** with the **Site Backup Utility**.

When the association is made, the following message appears:



Press **OK** to return to the **Site Backup Utility** Interface.

## Backup Options menu

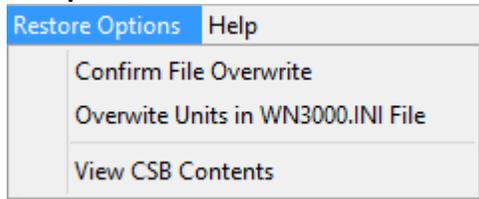


The **Backup Options** menu allows you to enable or disable different options affecting the **Backup** operation.

If an option has a tick beside it in the menu, it is enabled for the next backup operation. If there is no tick, the option is disabled.

For more information about the individual options, see *Backup Options* on page 15.

## Restore Options menu



The **Restore Options** menu allows you to enable or disable different options affecting the **Restore** operation.

If an option has a tick beside it in the menu, it is enabled for the next backup operation. If there is no tick, the option is disabled.

For more information about the individual options, see *Restore Options* on page 19.

## Help menu

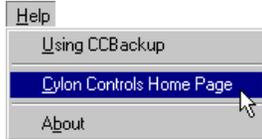
The **Help** menu offers several sources of information about the **Site Backup Utility** and **Cylon Controls**.

### Site Backup Utility User Guide



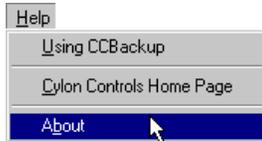
This opens the on-line manual for the **Site Backup Utility**

### Cylon Controls Home page



Clicking on this causes the PC's default browser to open, and to load the Cylon Controls web page, from [www.cylon-controls.com](http://www.cylon-controls.com) (which redirects to [www.cylon.com](http://www.cylon.com)).

### About the Site Backup Utility



This opens a box displaying information about the current version of the **Site Backup Utility**:



Press **OK** to return to the **Site Backup Utility** Interface.

## THE TOOLBAR



The **Toolbar**, located just below the **Menu bar** on the **Site Backup Utility interface**, contains buttons that act as short cuts to the most common features of the **Site Backup Utility**.

### Backup Site button



Pressing this button on the **Toolbar** starts the **Backup** operation (*see page 10*).

It is the equivalent of the **Backup** option on the **File** menu, or pressing [Ctrl] + [B] on the PC's keyboard.

### Prepare Site for Backup button



Pressing this button on the **Toolbar** starts the **Select files for backup** operation (*see page 11*).

It is the equivalent of the **Prepare for Backup** option on the **File** menu, or pressing [Ctrl] + [F] on the PC's keyboard.

### Restore Site button



Pressing this button on the **Toolbar** starts the **Restore** operation (*see page 16*).

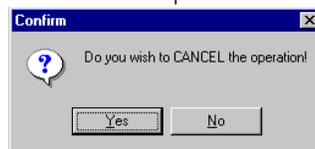
It is the equivalent of the **Restore** option on the **File** menu, or pressing [Ctrl] + [R] on the PC's keyboard.

### Cancel Current Operation button



This toolbar button allows you to cancel the current operation in the **Site Backup Utility**.

If you select **cancel**, the following message will appear:



If you press **No**, the program will continue with the current operation.

If you press **Yes**, the current operation will be cancelled and the program will return to its previous state.

### Select Backup options button



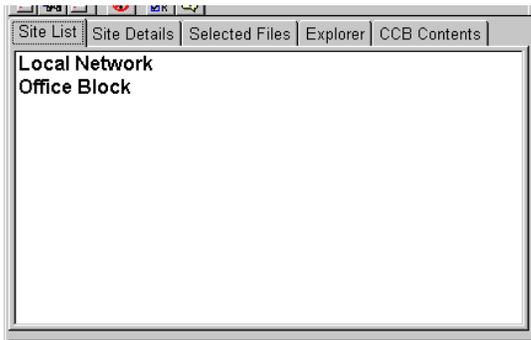
Pressing this button on the toolbar opens the **Select Backup/Restore Options** dialog box.

### Select Help button



Pressing this button on the toolbar opens the **About Backup** box.

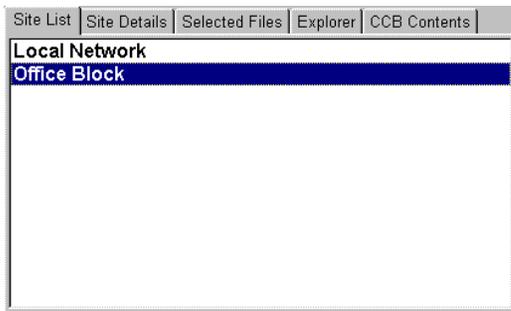
## THE DETAILS WINDOW



The **Details Window** is the lower part of the **Site Backup Utility** interface. It displays information about the files that make up a site, and are to be backed up or restored.

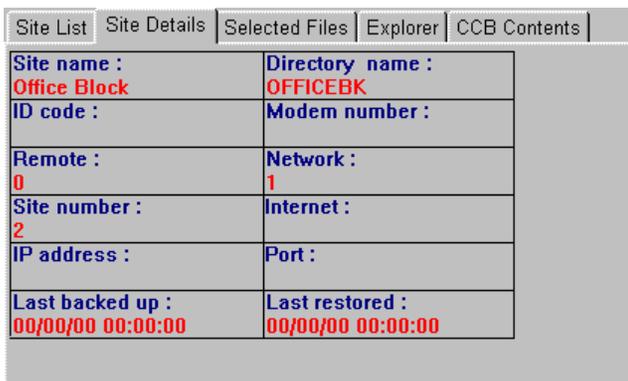
Tabs along the top of the **Details window** represent the different types of information available about files and sites.

### Details Window - Site List tab



The **Site List** tab shows all the sites installed on the PC. To back up a site, or view details about a site, it must be selected in this window.

### Details Window - Site Details tab

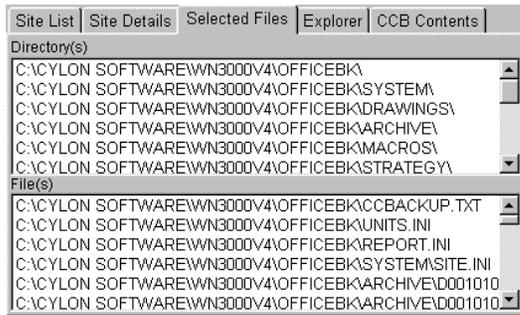
A screenshot of the Site Backup Utility interface showing the 'Site Details' tab. The tab is active, and it displays a table of site information for the selected 'Office Block' site. The table has two columns and six rows of data.

Site name :	Directory name :
Office Block	OFFICEBK
ID code :	Modem number :
Remote :	Network :
0	1
Site number :	Internet :
2	
IP address :	Port :
Last backed up :	Last restored :
00/00/00 00:00:00	00/00/00 00:00:00

The **Site Details** tab shows detailed information about the site selected in the **Site List** tab.

This information helps ensure that the correct **Site** has been selected for backup.

## Details Window - Selected Files tab



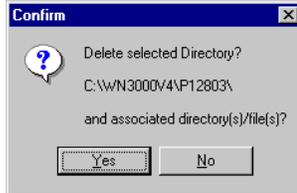
The **Selected Files** tab shows the directories and files that make up the site that has been prepared for backup.

The directories are listed in the top part of the window, the files are listed in the lower part.

### How to remove a directory from the Select Files tab

To remove a directory from the backup select the required directory then press the right mouse button.

The **Confirm** dialog will appear:



- If you press the **No** button, the program will return back to its previous state.
- If you press the **Yes** button, the selected directory(s) will be removed from the **Directory(s)** list box along with any associated sub-directories and any associated files will be removed from the **File(s)** list box.

**Note:** It is possible to select multiple directories using the [Shift] and [Ctrl] keys on the PC's keyboard.

### How to remove a File from the Select Files tab

To remove a file from the backup select the required file then press the right mouse button.

The **Confirm** dialog will appear:

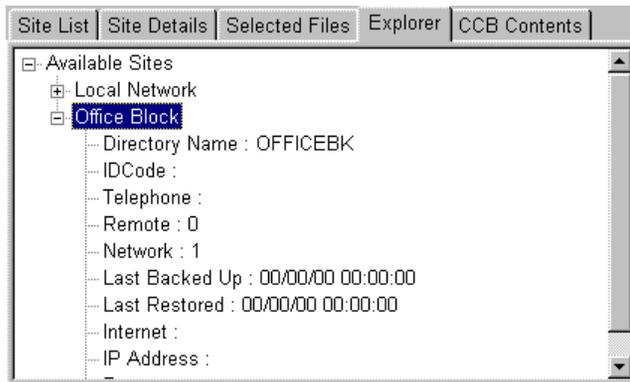


The **Confirm Delete Files** box will appear:

- If you press the **No** button, the program will return back to its previous state.
- If you press the **Yes** button, the selected files will be removed from the "File(s)" list box.

**Note:** It is possible to select multiple files using the [Shift] and [Ctrl] keys on the PC's keyboard.

## Details Window - Explorer tab



The **Explorer** tab allows you to examine the details of any site installed on the PC without selecting it for backup. The details shown are the same as those shown in the **Site Details** tab for the site selected in the **Site List** tab, but can be displayed for any or all sites.

This tab allows you to browse through the installed sites, and is useful to compare different sites, or to identify a site for backup, etc.

## Details Window - CCB Contents

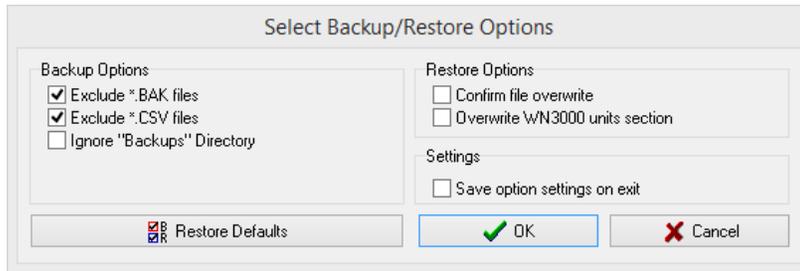


The **CCB Contents** tab is used to list the files that are stored in the file created by a previous backup.

To choose the files to display, select **View CCB contents** from the **Restore Options** menu.

## THE OPTIONS DIALOG BOX

The options that govern the Backup and Restore processes may be set either from the individual **Backup Options** and **Restore Options** menus, or from the **Select Backup/Restore Options** dialog box:



This dialog opens when you press the **Options** button on the toolbar:



You can select an option by placing a tick in the check box beside it. To de-select an option, clear the checkbox beside it.

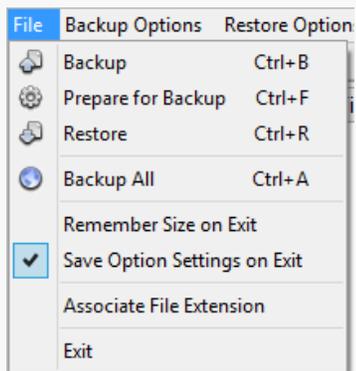
Descriptions of the different options are given in *Backup Options* on page 15 and *Restore Options* on page 19.

If you press the **Cancel** button, the dialog box will close and program will return to its previous state.

If you press the **Restore Defaults** button, the check boxes will be changed back to their default condition, the dialog box will close and program will return to its previous state.

If you press the **OK** button, the new setting will be used when a site is prepared for a backup.

**Note:** The chosen settings will not be remembered the next time the program is run unless the **save settings on exit** menu option is selected from the **File** menu







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