Backing up Data for Disaster Recovery

Introduction

TourTrax has a built-in system for backing up your reports and disaster recovery. "Automatic Email Reports" allow you to receive automatic reports, which can be used for Disaster Recovery and auditing. TourTrax also performs automatic server-side backups daily, which means your data is always available in the event of a disaster.

This allows you to be in control of your own data backups and ensure that sensitive corporate data is in your control.

Available Email Reports

TourTrax allows you to receive automatic reports, at set times. These can be daily, weekly, monthly or yearly reports. They can be for specific sites, or all sites within your deployment. The reports that are available for export include :

- Activity Report - Summary of all activity (tag reads / checkpoint scans) for that period
- Incident Report - Summary of any incidents that occurred during set time period
- Dynamic Tour Report - Summary of all Dynamic Tours during set time period
- Static Tour Report - Summary of all Static Tours during set time period
- Timesheet Report - Summary of all recorded Timesheets during set period
- Compliance Report - Summary of Checkpoint Compliance during set time period

These reports are sent via email, in PDF format, which can be saved and viewed at anytime.

Creating Automatic Email Reports in TourTrax

Creating a scheduled export of your data is done from the TourTrax.net dashboard (www.tourtrax.net).

Once you have logged into the dashboard, select **Management Reports** (from the control panel on the left) and then select **Email Reports**.
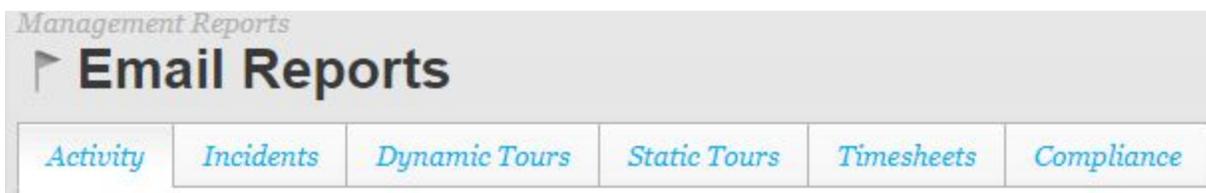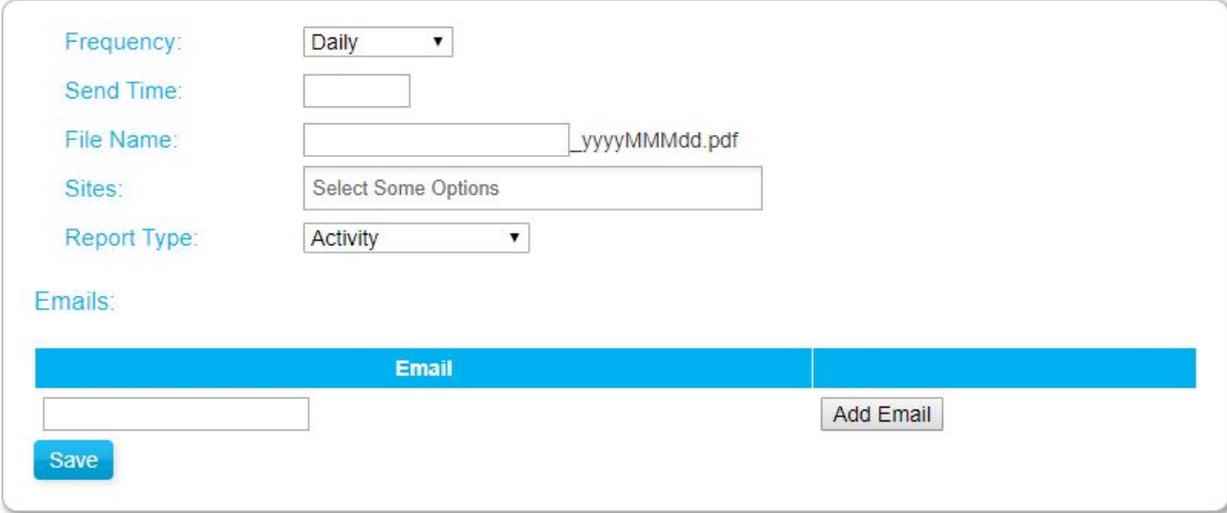
Once you have reached the Email Reports section, we now have the option to create a new automatic email or edit any existing automatic reports.

To get started, select the report you wish to receive by selecting the appropriate tab and pressing **Add New**.

Activity Report

The options available to you when creating a new automatic email for Activity is as follows :

Frequency : Daily (every day), Weekly (On a specific day of the week), Monthly (Sent on the last day of the month), Yearly (Sent at the end of the calendar year).
Send Time : The time that the report is sent.
Sites : Choose which sites you want to be included in the report
Report Type : Activity / Proof of Attendance
Emails : The emails which will receive the current report (1 per line)

1. Select the **frequency** at which the report to be sent out
2. Select the time (**Send Time**) you wish the report to be sent out
3. Enter the **File Name**, which the report will be called
4. Select the **sites** you wish to include on the report
5. Select the **report type**.
6. Enter the email(s) you wish to receive the report, and press **Add Email**
7. Select **Save**

Incident Report

Field	Value
Frequency:	Daily ▼
Send Time:	
File Name:	_____ _yyyyMMMdd.pdf
Sites:	Select Some Options

Emails:

Email	
	Add Email

Save

Frequency : Daily (every day), Weekly (On a specific day of the week), Monthly (Sent on the last day of the month), Yearly (Sent at the end of the calendar year).
Send Time : The time that the report is sent.
Sites : Choose which sites you want to be included in the report
Emails : The emails which will receive the current report (1 per line)

1. Select the **frequency** at which the report to be sent out
2. Select the time (**Send Time**) you wish the report to be sent out
3. Enter the **File Name**, which the report will be called
4. Select the **sites** you wish to include on the report
5. Enter the email(s) you wish to receive the report, and press **Add Email**
6. Select **Save**

Dynamic Tour Report

Frequency : Daily (every day), Weekly (On a specific day of the week), Monthly (Sent on the last day of the month), Yearly (Sent at the end of the calendar year).
Send Time : The time that the report is sent.
Tours : Choose which tours you want to be included in the report
Report Type : The detail in which the report goes into (Full, Missed, Summary)
Emails : The emails which will receive the current report (1 per line)

1. Select the **frequency** at which the report to be sent out
2. Select the time (**Send Time**) you wish the report to be sent out
3. Enter the **File Name**, which the report will be called
4. Select the **tours** you wish to include on the report
5. Select the **report type**.
6. Enter the email(s) you wish to receive the report, and press **Add Email**
7. Select **Save**

Static Tour Report

Frequency : Daily (every day), Weekly (On a specific day of the week), Monthly (Sent on the last day of the month), Yearly (Sent at the end of the calendar year).

Send Time : The time that the report is sent.

Tours : Choose which tours you want to be included in the report

Report Type : The detail in which the report goes into (Full, Missed, Summary)

Emails : The emails which will receive the current report (1 per line)

1. Select the **frequency** at which the report to be sent out
2. Select the time (**Send Time**) you wish the report to be sent out
3. Enter the **File Name**, which the report will be called
4. Select the **tours** you wish to include on the report
5. Select the **report type**.
6. Enter the email(s) you wish to receive the report, and press **Add Email**
7. Select **Save**

Timesheet Report

Frequency : Daily (every day), Weekly (On a specific day of the week), Monthly (Sent on the last day of the month), Yearly (Sent at the end of the calendar year).
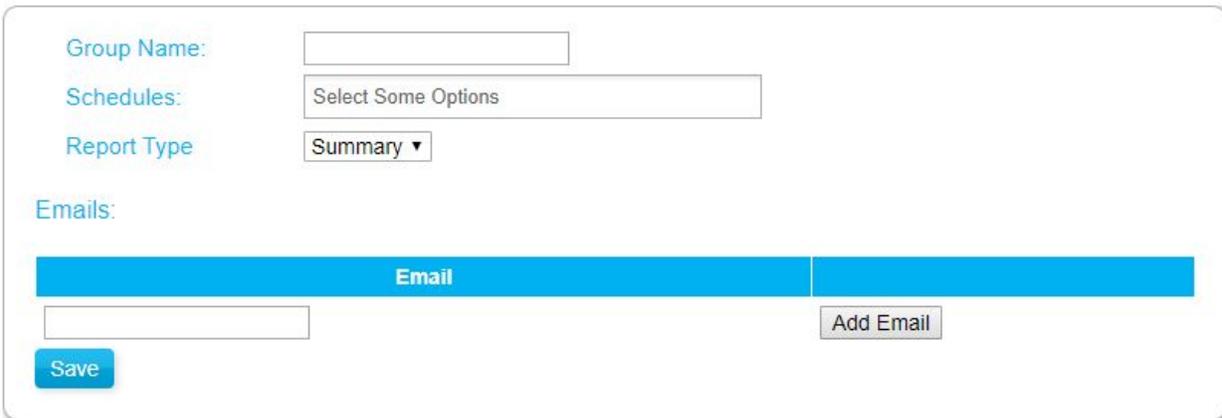**Send Time :** The time that the report is sent.
Sites : Choose which sites you want to be included in the report
Emails : The emails which will receive the current report (1 per line)

1. Select the **frequency** at which the report to be sent out
2. Select the time (**Send Time**) you wish the report to be sent out
3. Enter the **File Name**, which the report will be called
4. Select the **sites** you wish to include on the report
5. Enter the email(s) you wish to receive the report, and press **Add Email**
6. Select **Save**

Compliance Report

Compliance reports work with Compliance schedules and are only sent when the compliance period has ended (for the selected Compliance schedule)

Group Name : Enter a name for the compliance schedule (this will allow you to identify the compliance schedule and make changes at a future date if needed)
Schedules : The compliance schedules that compliance reports will be sent about
Report Type : The type of report that will be sent (Summary / Full)

1. Enter the **Group Name**
2. Select the **Schedules** which will be included in this report
3. Select the **Report Type**
4. Enter the **Email(s)** which this report will be sent to
5. Select **Save**

Data Backup Best / Suggested Practices

Once you have received the data in the reports, the data is yours. The decision for how long to store it and how it is stored, is yours. We do have a couple of suggestions / best practices when it comes to storing the data.

Storage

It is suggested that you get the information sent to an email which is provided by a "cloud" email provider. This allows you to store the information indefinitely, with the knowledge that it will not be lost. If you store the reports on local mail server or file server, there is a chance that the information could be lost.

It is also suggested that you store the information in multiple mediums. This could include another email address, a physical location (such as a USB, or local file server), or any other means of data storage.

Auditing

We suggest that you perform an audit based on the frequency of which you receive emails. The more often you receive an email report, the more often an audit should occur.

Typical audits include :
- Ensuring emails are being received when they are suppose to
- Reviewing the list of emails that receive reports
- Verifying reports have the correct information

Data Retention

Data retention policies vary across different industries, but we recommend you only keep the data for as long as internal policy requires. All data within the TourTrax system is backed up and stored on a cloud server.