



## Backups — A Great Insurance Policy

### **Why Backup?**

You can lose your data when:

- Viruses from the internet corrupt your hard drive so badly that you have to reformat it.
- Your hard drive dies suddenly.
- A fire, tornado, flood, theft or other disaster hits your company.
- You have so much corruption in a file that it cannot be fixed, and the only thing to do is to use a backup to replace the file with an older version of the file. That takes the file back to when the program was working properly. The more recent the backup file, the less data you will have to re-enter.
- A power failure shuts down your computer in the middle of a program. Business/practice software is especially susceptible to this problem.

We really hate telling a client that the problem can't be fixed and there is nothing further we can do because they do not have a backup.

### **Copy or Backup**

**Copy** – This is like a photocopy of a document. It's great for document files when all you need is an exact duplicate of the letter you sent last week. When copying business software data files, make sure to copy all the necessary files.

**Backup** – Business software often has a Backup routine that compresses all the necessary data files into one file. You need to use the program's Restore function to access the data in the files.

### **Every company needs a written policy for:**

- What to backup
- What to use to backup
- Who is responsible for making & testing the backups
- How often to backup
- How many backups to keep
- Where program & backup disks are stored
- Off-site backups
- Testing the backups

### **What to Backup**

- All data files from your accounting, patient billing, point of sale or restaurant software
- Important correspondence files
- Engineering files
- Customer contact information files
- Any vital files that would be difficult or impossible to replace

### **What to Use to Backup**

You may need to use more than one of the following methods for the different files you need to backup.

**CD read-write drive** – use the Create a CD program that came with your computer. Or in Windows Explorer use copy and paste. A CD can hold about 750 MB of data (500 floppies). Make sure you create a CD that can be used on any computer.

**DVD read-write drive** – will hold 4+ GB of data on a DVD. Make sure you create a DVD that can be used on any computer.

**TIP:** A battery power backup unit added to each station can help by keeping your computer(s) running for a few minutes until you shut down the program(s) properly and avoid file corruption.

**TIP:** Windows has a backup routine that can be scheduled to run at a specified time.

**TIP:** Floppy disks and tapes can wear out. Plan on replacing them once a year.

**TIP:** In order to minimize re-entry time, we recommend backing up daily, especially if you enter a great deal of information each day.

**Flash drive** – This is just one name for a small device that plugs directly into a computer’s USB port. These are actual mini-hard drives and you use Windows XP Explorer Copy & Paste to transfer data files to the drive. Other names for the drive are jump drive, memory drive, memory stick. The drives come in a variety of storage sizes. Choose the one that best suits your needs. Use more than one so you are not copying today’s data over yesterday’s data.

**Zip drive** – a super floppy where you can store a great deal of compressed data.

**Tape backup** – a separate drive, either external or internal, that backs up onto special tapes. Depending on the manufacturer, a tape can hold 5 to 8 GB of data. It can also compress the data so you can get even more data on the tape.

**External hard drive** – This is a hard drive dedicated to backups. It plugs into the computer’s USB port and you use Windows Explorer Copy & Paste to transfer data files to the drive. Copy data files to separate directories on the hard drive so you don’t copy today’s data over yesterday’s data.

**3½" floppy disks** – great for small files. Use Copy and Paste in Windows Explorer. A file can only be 1.4 MB. Business/Practice programs often have a backup feature that compresses the data files so it will fit on 2 or more disks.

### **Who is Responsible**

Decide who is responsible for making backups. Be sure and put the responsibility into the employee’s job description.

### **How Often to Backup**

When you use a backup to restore data, you are taking your files back to the way they were at the time you made the backup. Any information that was entered after that date will need to be re-entered. The frequency of backup depends on how much data you enter each day.

### **How Many Backups**

- If you are making daily backups, create a separate backup for each day of the week or even two weeks.
- Never copy today’s backup over yesterday’s.
- Keep more than one set of backups. If you don’t discover a problem right away, you may need to go back to a backup from a week ago to find one that isn’t corrupted.
- Don’t forget the off-site backups.

### **Storing Backups and Program Disks**

Keep all the backups and Program disks in a secure location. If using a safe, make sure it is fire proof for magnetic data. Not all are.

### **Off-site Backups**

- Businesses that have off-site backup storage can get back up and running quicker after a disaster.
- Decide where the off-site is located. Make sure it is secure and fire proof.
- Decide who is responsible for the off-site backups and put it into the employee’s job description.
- When making backups, make an additional set of backups that will be stored off-site.
- Keep these backups current.

***TIP: Also keep a copy of the serial number and any registration or activation code number with your program disks. You will need that if you ever need to re-install your software.***

### ***Testing the Backup***

It's a good idea to test your backup regularly. We've run into companies that are backing up old, not current data files, empty directories, or partial data files.

In your program, create a new, blank company and restore or copy your backup to that company. Look at the data to see if it is current and accurate. If not, you will need to make an adjustment in your backup routine.

**Have any questions?  
Call us. We would be happy to talk with you.**



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