

How to Backup to Drive

Article #	: GEN_9012
Last Revision	: 4 th January 2018
Revision	: 2.00
PX Version	: 9.0.1

SUMMARY

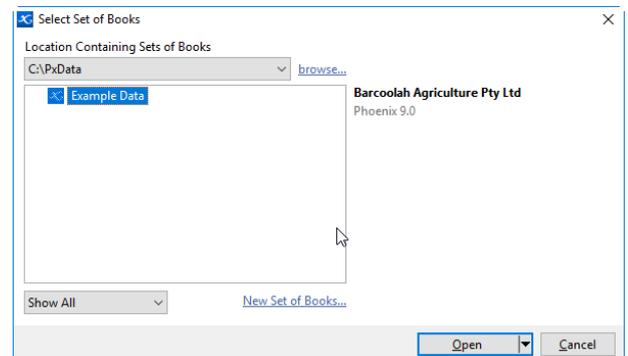
This step-by-step guide describes how to backup your Phoenix Data to a drive. There are many different types of drives e.g. USB, External Hard drive & local disk drives.

Instructions

1. If you are backing up to an External Drive e.g. USB or External Hard drive, ensure it is plugged in and you know which Drive it is in

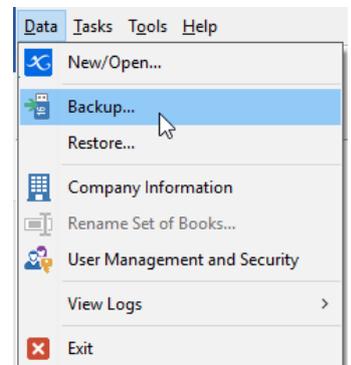
#Note If you are unsure of which drive your backing up to see the Trouble Shooting section at the back of the help note

2. Launch Phoenix and open the set of set of books you wish to backup
3. From the **Data** menu select **Backup**



#Note Phoenix will only backup one set of books at a time. This process will need to be repeated for each set of books that you wish to backup.

4. Phoenix will display a message asking you to close all open forms before you continue. Click the **Yes** button to continue
5. The Phoenix Data Integrity Check window will appear. Click **Check** and then **Run Checks**. Once the checks are completed and it shows "No Errors" click **Close**

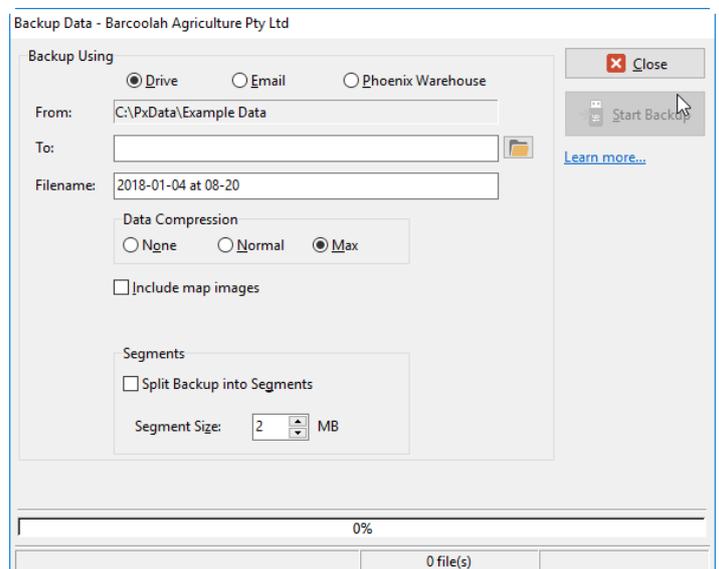


#Note It is strongly recommended to check the integrity of your data. Please contact AGDATA if you received any errors whilst checking the data integrity

6. You will now be at the Backup window
7. Ensure that you have your Backup Using dot is in **Drive**

#Note by Default Phoenix will show the last folder and drive it was backed up to. If in the To field your drive and/or folder do appear correctly Click Start Backup

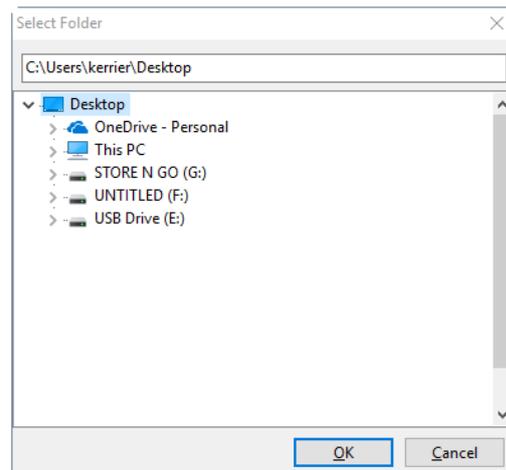
8. Click the **Browse** button  on the right-hand side of the 'To' field



9. A new window will appear titled **Select Folder**
10. Click the **>** button on the left of **This PC** to get the drop down menu
11. A list of devices that are available to your computer will appear. Select your USB, external hard drive or other drive from the list and click **OK**

#Note if you are backing up to a local computer drive you can browse to this local drive from here as well

#Note If you are saving your Phoenix Backups into a folder e.g. Phoenix Backups on your USB, external hard drive or other drive it can be selected once choosing the drive correctly



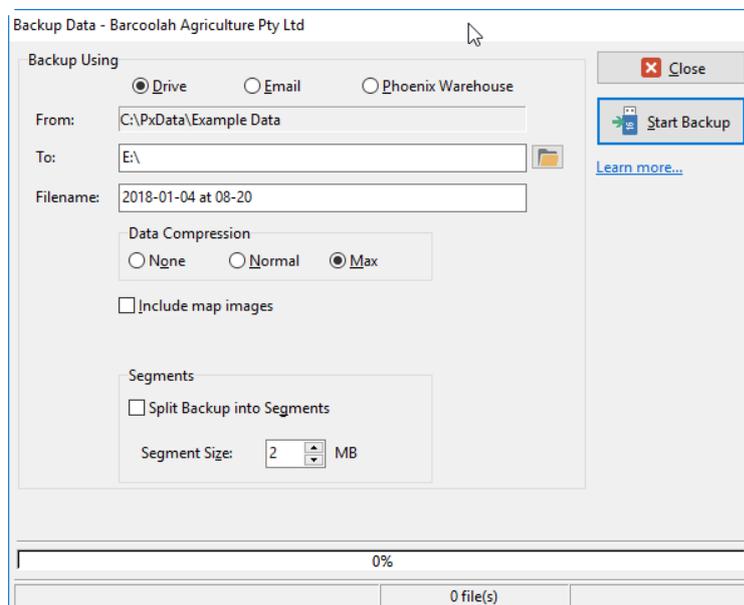
12. You will now be back at the Backup Data window with the chosen Drive and/or Folder displayed in the **To:** field

#Note The File Name by default is the date and time of the backup. This format has been chosen so that if you have mutiple backups on the same device, they will sort from the oldest to the newest. By keeping each backup instead of overwriting the previous backup you can go back to a previous backup if necessary

13. Data Compression by default should be left on **Max**

14. **Include Map Images** should be ticked if you are using Phoenix Mapping & wish for your images to be backed up as well

#Note Including map images in every backup will make your backup size significantly larger. If you are storing your Map Images in a secure location, then it isn't necessary to include these in each backup

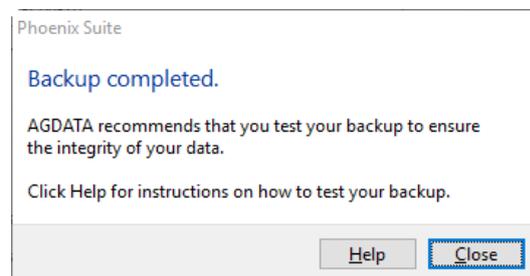


15. **Segments:** Split Backup into segments is used when backups are too large to have in one backup file. This is specifically used when backing up large Phoenix Data via email

16. Click **Start Backup.**

17. When the backup process is finished Phoenix will display a Message: "Backup Completed. AGDATA recommends that you test your backup to ensure the integrity of your data. Click Help for instructions on how to test your backup"

Click **Close**



18. This will bring you back to the Backup window. Click **Close**

#Note AGDATA recommends that you have a minimum of 2 backups across 2 media types (e.g. USB, External hard drive, Email, Cloud storage or Phoenix Warehouse) at all times.

Trouble Shooting

How to tell which Drive is your Backup Drive

Before you can backup, you are going to need to know the location of the drive. To find out, the easiest way is to look on your computer.

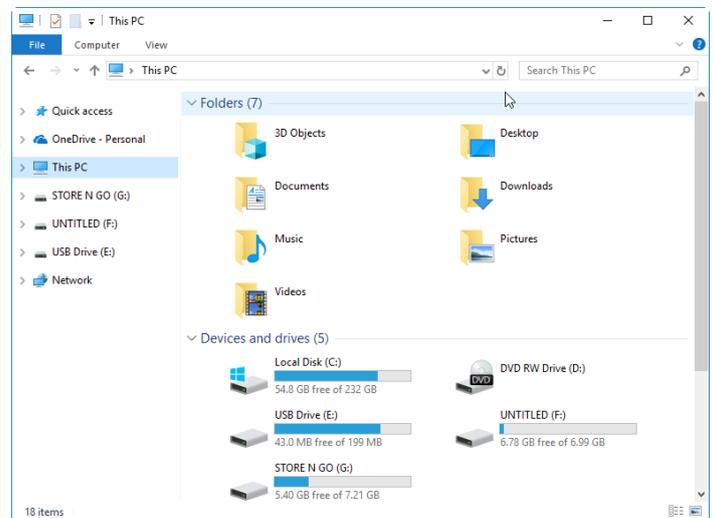
Instructions



1. Open a file explorer  on your computer
2. Then showing on the left-hand side is **This PC**. Double click for it to show
3. Showing in the middle of your file explorer window is the information on what is on 'This PC'.
4. Under the heading **Devices and drives** you will see all your drives e.g. USB or External hard drives etc.

#Note on older Windows operating systems your 'This PC' may be called 'Computer'. Also 'Devices and drives' maybe called 'Devices with removable storage'.

5. Once you have located the drive e.g. E: you can then double click to view the data stored on it. To check the backup which you have just done in Phoenix is in the correct drive. Simply double click and open into your drive e.g. E: (USB drive). Then check the backup file is showing with the correct date of which the backup was done.



Importance of Testing your Backups

Backups should always be tested by restoring them into a 'test' set of books to ensure that your backup is secure and not corrupted. Backups are what we rely on when all else fails. If your backup is faulty, or the drive you have stored it on is faulty, then you have wasted your time. Even worse, if your data has failed and a backup is required, and your backup is faulty, then you have lost everything! Therefore, it is important to test your backups.

Looking at the files you have backed up inside the folders, as described above, after a while you will come to notice you are growing a "backup history". If you backup Phoenix each time you use it, you will have a backup all of your data to this point. This means that if a problem develops over time or you want to go back to a point to undo what you have done. This can be done by restoring one of the backups. It is good practice to keep a least three recurrent backups.

Testing a backup is simply restoring the backup file into a separate set of books (not your working data set of books) to check the data is showing correctly. It is recommended you call the set of books to restore into 'Test'. For instructions in the Phoenix [HELP](#) Menu chose the [Index Tab](#) and then select [Backup](#). This will show the details on how to test a backup. Alternatively, you can watch a [Video Tutorial](#) by going to [HELP](#) and selecting [Video Tutorials](#) from the menu. This will launch your internet browser and you can view the Video.