

# Appendix A: Backing Up Data

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## *In This Appendix*

- ✓ **Why backing up files is important**
- ✓ **Backing up to disks and other hard devices**
- ✓ **Backing up online**
- ✓ **Restoring data**

**I**t's not enough that people today create megabytes and gigabytes and tyrannosaurusobytes of data on a daily basis . . . have you every stopped to think about where all these bytes go? Just because we can't see them doesn't mean they aren't there, filling the space around us. When we walk down the street, are we heedlessly parting a sea of bytes, just as easily as we move through the air? What if these bytes were visible? Would the pavement be thick with them? Would they pile up on corners like trash in Manhattan? And now we find out we're supposed to back up everything we do, effectively *doubling* the number of bytes around us. Mark my words. It won't be long before the bytes get organized and start asking for weekends and holidays off.

If you've never lost computer data you either (a) don't use a computer, or (b) are the next candidate for the Big Crash. Because I know you must use a computer or else have really strange reading habits, my guess is you fit the bill for the big crash. Everybody loses data, sometimes without even trying. Just ask the people who lived in New Orleans in the fall of 2005 who left their computers behind when they fled the flooding city.

The question you need to ask yourself when entering information on your computer is, "Do I want to have to enter all of this information again if something bad happens to my computer?"

If the answer is, "Sure, why not? I've got nothing better to do with my time," you can skip right over this appendix. If the answer is something more along the lines of, "You've got to be kidding!," it's time to get started discussing options for backing up your data.

### *Where Should I Back Up?*

You can choose to back up your data in a number of different locations. For example,

- ◆ **Back up to a different file on your own computer.** This system doesn't give you much protection if your computer crashes, but it's better than nothing. If for some reason your main data file gets corrupted, you at least have a backup handy, and easy to access.
- ◆ **Back up to your network server.** This takes you a level above the first option — if your computer crashes, the server still has your data. If your entire network crashes, you're out of luck.
- ◆ **Back up to an external disk, tape, CD-ROM, or hard drive.** There are plenty of options when it comes to backing up material on external media. Initially, your Quicken data file is small enough that you can back it up onto a floppy disk. As the file grows, the disk needs to be swapped for a larger variety, such as a Zip disk, tape, CD-ROM, or an external hard drive. Now that you've moved your backed-up data off of the computer and the server in your office, you can consider off-site storage of the data. The farther away you move the backup, the safer the data is in the event of a natural disaster. On the other hand, the farther away the data, the harder it might be to get access to it if you need a quick restoration. These are the issues you must consider when deciding where to store your data.
- ◆ **Back up online.** Quicken offers an online back-up service that is easily available right from your Quicken program.



Quicken isn't the only game in town when it comes to online data backup. There are plenty of secure Internet services that provide a home-away-from-home for your data. Search and ye shall find.

### *Performing the Backup*

After you've decided where to back up your data, it's time to figure out how the back-up system works. First, decide how you're going to back up and where you're going to store the data. When you're ready to begin, choose either the external or the online back-up process and get busy making little backups.

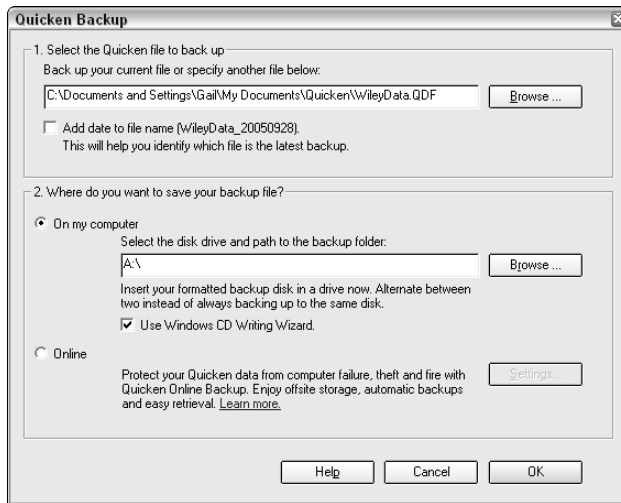
#### ***Backing up data to an external, non-online location***

Start by getting the back-up device and storage media ready, so that when you begin this procedure, you won't have to stop to fumble around looking for the back-up disk or CD.

**1. Open the Backup window by choosing File→Backup from the menu, or pressing Ctrl+B.**

In the Quicken Backup window that appears (Figure A-1), you are asked what you want to back up and where you want to put it.

**Figure A-1:**  
Backing up your data is as simple as telling Quicken where to place the file.

**2. Identify the Quicken data file to be backed up.**

This is a no-brainer because Quicken knows where its files are located and has already picked out the file that needs to be backed up. If there is actually a *different* Quicken data file that you want to back up, the smart thing to do is close this Backup window, open the correct data file in Quicken, and return to step 1. As long as the data file that needs to be backed up is open, Quicken presents the correct filename in the Backup window.

**3. Check the Add the Date to File Name check box.**

This helps you keep track of which back-up file is which, and it can't hurt, so I suggest you go ahead and check the box.

**4. Tell Quicken where to put the file: on your computer or online.**

I'm going to skip the online option for a sec and concentrate on computer backups. Backing up to your computer doesn't necessarily mean placing the back-up file right on your computer (although it can mean this if you like). Basically, it means backing up to a drive accessible by your computer, and this can include all the options of drives, including a tape drive, Zip disk, DVD, CD-ROM, external USB drive, and so on. Just identify the drive letter and, if necessary, the folder where the back-up file is to be



placed. Oh, and just to be safe, keep track of where you put your back-up file so you can find it again in case you need to restore your data.

Windows XP users have an extra bonus. You'll see a little check box that enables you to use a CD writing wizard if you want to use special CD writing software to store your data on a CD.

### **5. Click OK to actually perform the backup.**

Change your mind? Click Cancel instead and back up later. A little window appears when the back-up process is complete, telling you everything went smoothly and your extra copy of your data is safe and sound. Click OK to close the window.

### **6. Perform the most important step.**

And you thought you were finished! Not so fast. Take your back-up disk or whatever media you used to store the backed-up data, and place the data somewhere secure. *Now* you can rest easy.

## ***Backing up data online***

Online data backup enables you to keep a copy of your data safe and readily available without having to bother with disks and tapes and extra drives. Note, however, that there is a fee associated with most online back-up service providers, including Quicken's service. The process described below is for use with the Quicken online service. If you are using another service, you need to find out their instructions. The back-up process likely differs slightly.

If you are using Quicken's online back-up service for the first time, go ahead and get yourself signed up for the service before beginning the back-up process. When you're all signed up, come back and get started.

### **1. Open the Backup window.**

**Just like in the previous steps, choose File⇒Backup from the menu, or press Ctrl+B and the Quicken Backup window appears.**

### **2. See step 2 in the previous section for information about making sure you're backing up the right file.**

### **3. Click the Online back-up option.**

### **4. Click OK.**

Quicken takes over and the backup is completed.



Quicken offers a free 30-day trial for the online back-up service. If you haven't signed up for Quicken's online backup and want to give it a try, complete steps 1-4 above and you are taken right to the screen where you can sign up for the free trial.



If you are a subscriber to Quicken's online back-up service, a Settings button magically appears in your Quicken Backup window. Clicking this settings button gives you the option of scheduling automatic backups to the Quicken online back-up service. Just say the word and Quicken can automatically drop by, backing up and making sure your data is safe without your having to remember to do the back-up thing yourself.

## *Bring Back, Bring Back, Bring Back My Data to Me*

Backing up your Quicken data file is only half the fun. Losing the data from your computer begins the other half of the fun, the part when you have to go get your backed up data and put it back on your computer. You'll be glad you backed-up daily or weekly instead of once a year when you have to restore data. As with so many tasks in Quicken, restoration is quick and easy. Just take a look.

### *Restoring from disks, CDs, and other such places*

If you backed up your data to a disk or some other media, here are the steps to follow for restoration. P.S.: I'm sorry you're having this difficulty. You're probably not in a very good mood if you are dealing with a crashed or destroyed computer or a system that just won't cooperate with you. Sit back, have some milk and cookies, and let Quicken bring at least this part of your life back to normal.

#### **1. Reinstall Quicken if necessary, and then choose File⇨Restore Backup File from the menu.**

There is a side menu attached to the Restore Backup File menu choice. If Quicken knows where your data file is lurking, that filename and its location is listed on the side menu. If that file information is incorrect, or if there is a different data file you need to restore, choose Browse from the side menu. It might be the case that the Browse side menu is your only choice.

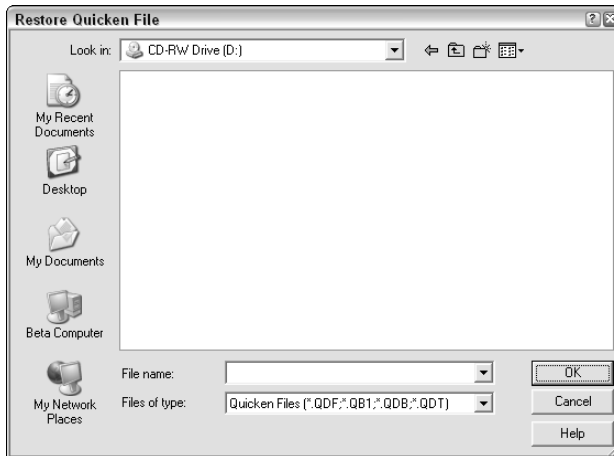
#### **2. Indicate the location of your back-up file.**

When the Restore Quicken File appears (Figure A-2), indicate the appropriate drive, folder, and file that you need to restore. When all of the information is correct, click the OK button to continue.

#### **3. Give Quicken the go-ahead.**

If a data file is already present on your system, your restoration is going to replace that file. You have to click OK in the box shown in Figure A-3 to continue with the restore process.

**Figure A-2:**  
Let Quicken know where to look for the file you backed up.



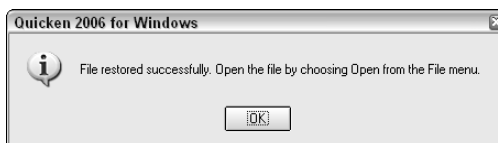
**Figure A-3:**  
Click OK to begin the restore.



#### 4. Open your restored data file.

Quicken lets you know when the restoration is complete. Click OK in the box shown in Figure A-4, and then click File⇒Open from the menu to gain access to your restored file.

**Figure A-4:**  
Click OK, and then open your restored data file.



### *Restoring data from your Quicken online backup service*

If you back up your data files using Quicken's online back-up service, you never have to wonder what you did with that back-up file — Quicken knows

exactly where your data is hiding. The restore process for online data doesn't go through the File menu in Quicken like the standard restore does. Instead, open the Quicken Online Backup program from your computer's Start menu.

When the online back-up program opens, click the Retrieve View tab, and then click the Retrieve Options button. Answer the questions to identify what you need to restore, and you are taken to a screen where you can find your files and begin the restoration process.



Because your back-up data files are stored online, you don't have to worry about loss of data should your computer be damaged. You can install Quicken on a different computer and restore your online data to the new computer.

