

Conveyancing And Trust Account System

DOING BACKUPS

IMPORTANT

It is essential that a back-up is done at the end of each day in which CATS has been used.

ONLY data is backed up in this procedure, not a copies of Word documents created by CATS. You should ensure you have your own backup procedures in place for these if required

Backup Requirements

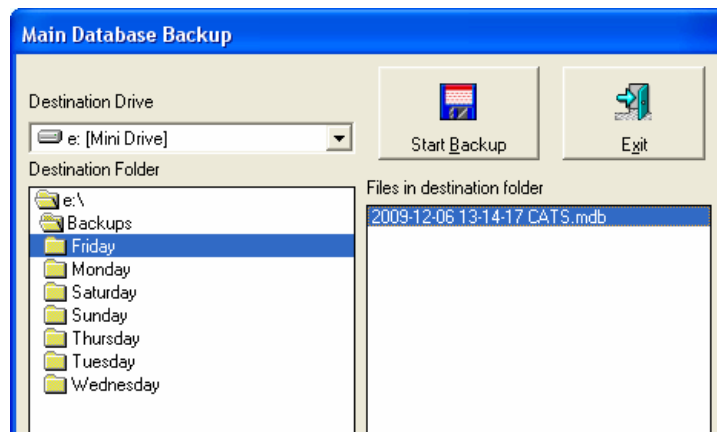
Prior to commencing the backup ensure all other users are logged out of CATS.

Back up to an external hard drive or USB, and keep the back up 'off site'. If this is not done a fire or break in could result in the loss of the back up as well as the primary data.

It is also suggested that backups are done at least, on a weekly rotational basis, i.e. when doing a backup for Tuesday, keep it until the following Tuesday. The reason is that a major error or data corruption may have happened two days earlier, and your backup for the previous day will be corrupt as well. If that was your only backup, you could not restore to a time prior to the corruption occurring. Rotational backups may mean up to seven different backup drives or having seven separate folders on the external drive, one for each day of the week but it affords extra protection of your data.

Performing a Backup

Select *Security / Backups* from the main menu to display the Backup screen.



Select the *Destination Drive* i.e. the external hard drive or USB to back up to.

In the *Destination Folder*, select the name of the folder to which the backup is to be saved. Expand sub-folders by double clicking the 'parent' folder.

In the above example, the sub-folder called Friday has been selected.

Click *Start Backup*. The backup should take no more than a few seconds.

When the backup has been completed, the name of the database saved is changed by the inclusion of the date and time that the backup was done.