

ValBiz Backup Strategy (Manual Backup)

Last Updated: 7th May 2018

The first thing to consider with any backup strategy, is how important is the data (not the software) contained within your database.

1. ValBiz™ On-line Backup

ValBiz is shipped with its own on-line backup facility. This can be manually triggered from the menu bar.

We recommend the ValBiz on-line backup in preference to anything else, due to the following:

- Other backups need to stop the ValBiz service, manually copy the whole system, and then restart the service. If the service is not stopped problems can occur where the service due to the system being shut down in an 'untidy state', i.e. with someone still logged on.
- A ValBiz file can be 'in use' (e.g. a background process not releasing it) then the file will not be copied and the manual backup is useless.
- The backup files can be in a compressed format to save space, which is becoming more important as more clients use the Document and Photo Manager which can take up significant amounts of disk space

2. Running the ValBiz™ On-line Backup

To run the on-line backup, click on **File** on the menu bar, then **Backup Database**. Running a backup can take a period of time, depending on the size of your database.

This will present a screen with just a few options to set:

Backup Directory:

This needs to be a folder (preferably empty) that can be included in any 'overnight' backups to tape etc. Use the browse button (with 3 dots on) to choose a folder you previously created

Quiesced – Read Only:

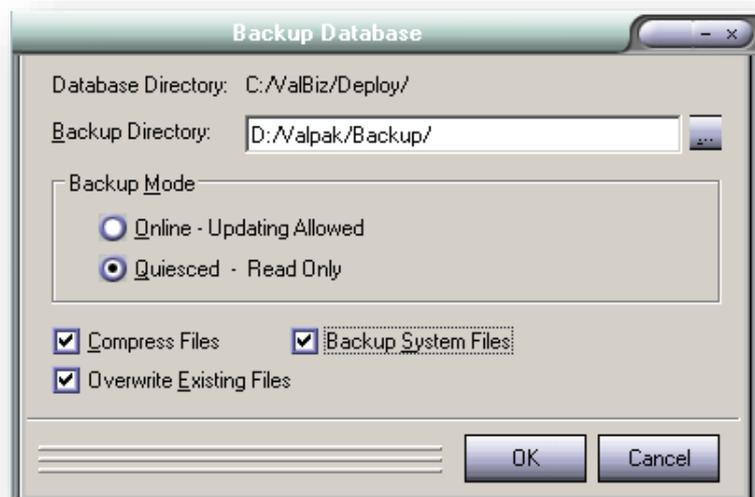
This needs to be selected

Compress Files:

You can tick this if space is an issue

Overwrite existing files:

Tick this - Note that it will overwrite a previous backup of the same format (i.e. compressed or uncompressed)



3. Space Required

It is important to note that the compressed and uncompressed option will write files in a different format (and name) to the backup folder.

For instance, if your compressed backup takes up 1 GB and your uncompressed backup takes up 2 GB; if you perform both a compressed and uncompressed backup to the same folder, on different nights, you will end up with 3 GB of files in that folder even if you ticked overwrite existing files. If you then did another uncompressed backup with overwrite existing files, 2 GB of files would be overwritten by a 'more recent' 2 GB of files, plus you would retain the 1 GB of the previous compressed backup.

So, it pays to monitor what you are writing, and whether you need to delete out older files (order them by date/time by clicking on that column heading to determine which the latest files are).

Note: When determining which files to delete or move, `.da_` files are compressed ones, `.dat` files are uncompressed. The exception is the `control.dat` file which is always written as a `.dat` file even on a compressed backup.

4. What to do with your backup

When the backup is complete it will present a screen that may say that a couple of files have not been backed up. Close this screen. Although this is not ideal, the warning message will not impact on the credibility of the backup.

The backup folder (containing something like 20 or 30 files of either `.da_` or `.dat` file type) then needs to be stored somewhere off the server drive (where ValBiz resides), but preferably off site, to cover fire or theft risk.

Depending on how you backup your computer/server, you will need to add this backup directory to your existing backup schedule

Bear in mind that there is no point in backing up your ValBiz system to the same server drive where ValBiz resides, as if this drive fails then it will likely make the ValBiz system and its backup unreadable. Likewise, fire or theft risk is not covered.