

Elementary Schools

Schoolbooks

Data Backup

Use this procedure to back up your PC-specific settings (menu button layout, reports, etc.) and your school's data. Backups are critical in the event your PC crashes or the data somehow gets corrupted. The more recent the last backup, the fewer transactions you will have to re-enter in the event of data loss or corruption.

When to Do

A data backup should be done each day that you record transactions or conduct other activity within SchoolBooks which changes the data (Bank Reconciliations, for example). The data backup is best done at the end of the day, when you are done with your Student Activity Funds work.

What to Do

1. Insert an external storage device (thumb drive) into an appropriate port on your computer.
2. Click the "Daily Data Backup" button or make this selection from the "File" drop-down menu. The "Daily Data Backup" window opens.
3. The "Daily Data Backup" window will appear. Ensure that the School Code and name are correct.
4. The Location field should be populated with the file path for the external storage device (such as E:\ or F:\) followed by the file name for the last backup file created. The format for the file name is typically ccc_SB_mmddyy.ZIP. The ccc is your School Code, SB stands for SchoolBooks, mmddyy is the date of the last backup file, and .ZIP is the file type. Example: F:\123_SB_100113.ZIP.

Note: If the previous backup file path and name is not populated in the window, you can enter that information in the Location field, or use the "Browse" button to select the file path and create the file name.

5. Change the date in the file name to the current date. Example: If file name which comes up is F:\123_SB_100113.ZIP and the current date is 10/04/13, change the file name to read F:\123_SB_100413.ZIP. **Do not back up the data without first changing the date in the file name** – do not overwrite the existing file!
6. Click on the "Proceed" button.
7. A small window will appear indicating "Backup complete". Click "OK".
8. Remove the external storage device and put it in a safe place – such as the school's safe – until the next time you will do a backup.

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PROCESS COMPLETE

Note: If you click on the Exit button of the Main Menu before doing a data backup, you will be prompted to do one. Follow the prompts on the screen and the above procedures to complete a backup.

Note: Because each backup file is a unique file, your external storage device will soon contain many files. We recommend that you periodically delete from the external storage device any files more than 60 days older than the day you last did Month End Processing in SchoolBooks.