## Backup

PaperlessPLUS allows you to backup Clients and Cabinets and all data contained therein. A Backup can be executed on demand at any time or Automated backups can be scheduled to occur at regular intervals or upon opening or closing the program.

To Backup your data for a Cabinet, use the following steps:

1. Click the **Tools** menu, point to **Backup**; then, select **Cabinets**.

PaperlessPLUS displays the Backup Cabinets dialog:

Backup Cabinets		X
Backup To: C:\ProgramData	a\CCHSFS\PaperlessPLUS\Backups	6
Select Cabinets to B	ackup	
Cabinet Name		
Active Clients		
Non Client Folders		
Inactive Clients		
Review And Assign		
P Help	Backup File Name Backup Canc	el

2. The default backup location is C:\ProgramData\CCHSFS\PaperlessPLUS\Backups. If you would like to backup to a different

location, click the 🔛 button next to the **Backup To:** box to browse to the desired backup location.

- 3. Select the Cabinet(s) that you would like to back up.
- 4. Enter a name for the backup in the Backup File Name box at the bottom of the Backup Cabinets dialog box.
- 5. Click the **Backup** button.

PaperlessPLUS completes the backup of the cabinets you selected.

## To Backup your data for a client, use the following steps:

1. Click the Tools menu, point to Backup; then, select Clients.

PaperlessPLUS displays the Backup Clients dialog:

Backup	Clients				×
Select (	Cabinet: Active Clients	•	Backup To:	C:\ProgramData\CCHSFS\P	ap 🔁
Sele	ect Client Folders	to Backup			
Searc	h by Name/TIN	Q		'0' Clients Checked for E	Backup
	Client Name		Last Ba	ackup Date	
	Brown James		No prev	vious backup	*
	Cabinet Warehouse		No prev	vious backup	
	Davis John		No prev	vious backup	
	Davis John		No prev	vious backup	
	DOE JANE		No prev	vious backup	
	Doe John		No prev	vious backup	
	Doe John		No prev	vious backup	
	EXAMPLE JANE		No prev	vious backup	=
	EXAMPLE JOHN		No prev	vious backup	
	HANSEN KELLY M		No prev	vious backup	
	Johnson Jimmy		No prev	vious backup	
	Jones Jimmy		No prev	vious backup	
	Jones Tammy		11/09/2	012	
	MARK JONES		No prev	vious backup	
	RUNNER ROAD		No prev	vious backup	
	Smith James		No prev	vious backup	-
<u>е</u> н	elp	Backup File	Name	Backup	ncel

- 2. Select the **Client(s)** that you would like to back up.
- 3. Enter a name for the backup in the **Backup File Name** box at the bottom of the **Backup Clients** dialog box.
- 4. Click the **Backup** button.

PaperlessPLUS completes the backup of the clients you selected.

## To schedule Automatic backups, use the following steps:

1. Click the **Tools** menu, point to **Backup**; then, select **Automated**.

PaperlessPLUS displays the Automated Backup dialog box:

Automated Ba	ackup				X		
Backup To:	C:\ProgramData\CCHSFS\PaperlessPLUS\Backups						
Please Select	Backup Type:						
Backup N	low						
Schedule	Automatic Bac	:kup					
Cabinet	s Included i	in Backup	)				
Cabinet N	lame						
Active Clie	nts						
Non Client	Folders						
Inactive Clients							
Review And Assign							
Frequen	cy and Tim	ing of Ba	ckup				
Frequency:	None		Ψ.	Last Backup:			
Day:			*	No previous backup			
Hour\Minu	te: 12:00	AM					
<b>Q</b> 111					-		
<u>Неір</u>				UK Canc	ei		

- 2. Select the Schedule Automatic Backup radio button.
- 3. Under Frequency and Timing of Backup, select the desired frequency under the Frequency: drop-down list. Available selections are Daily, Weekly, Monthly, When Opened, or When Closed.
- 4. If **Weekly** or **Monthly** was selected under **Frequency:**, select the desired day of the week or month for your backups under the **Day:** drop-down list.
- 5. If Daily, Weekly, or Monthly was selected under Frequency:, enter the desired time for your backups under Hour/Minute:.
- 6. Click **OK** to complete the process and save your settings.

See Also:

**Restoring Data**