



Backup and Restore Windows

Support Notes

This support notes are suitable for:

- MYOB BusinessBasics
- MYOB Accounting
- MYOB Premier
- MYOB Premier Plus

Introduction

Backing up your MYOB data is an important process that you should perform on a regular basis. Familiarising yourself with MYOB's backup process will ensure your valuable MYOB data is secure and can be quickly restored if needed. Backups are also important for the purpose of retaining historical records and the ability to access information from previous financial years. For example, it may be necessary to reprint an employee's Payment Summary for a previous year.

Solution Summary

Backup

To backup a Company File, with the file open, go to **File** -> **Backup** and click **Continue**. Select a destination for the backup file and click **Save**.

Restore

To restore a Company File, with any Company File open (even the Clearwater sample file) go to **File** -> **Restore** select the backup file to restore from and click **Open**. You then select the destination for the restored Company File and click **Save**. A confirmation message will appear, click **OK** to restore and log into the file.

Before backing up your MYOB data

For added security, the following is recommended:

1. Consider the storage media being used to store your MYOB backups. Due to the reliability and efficiency of the various high capacity storage media now available, we no longer recommend you use floppy disks for secure backup purposes. CD-Rom burners and Zip Drives are a better option.

2. Make multiple copies of your backed up data and store one or more copies of it off-site. This is especially recommended for backups taken at critical times such as immediately prior to Starting a New Financial Year.
 3. Setup your Company File so that when closing it, you are prompted to print the Session report, backup your Company File, and Verify your Company File when it is closed. You can access these preference options by going to **Setup** choosing **Preferences** then clicking **Security**.
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How often should I backup my MYOB Company File?

Ideally, your MYOB Company File should be backed up after each session with the Session Report printed before closing the file. Should something happen to your Company File, you will be able to restore the backup of the last session and then use the Session report to enter the missing data.

Can I backup my MYOB Company File to CD

There are currently only two types of CDs available:

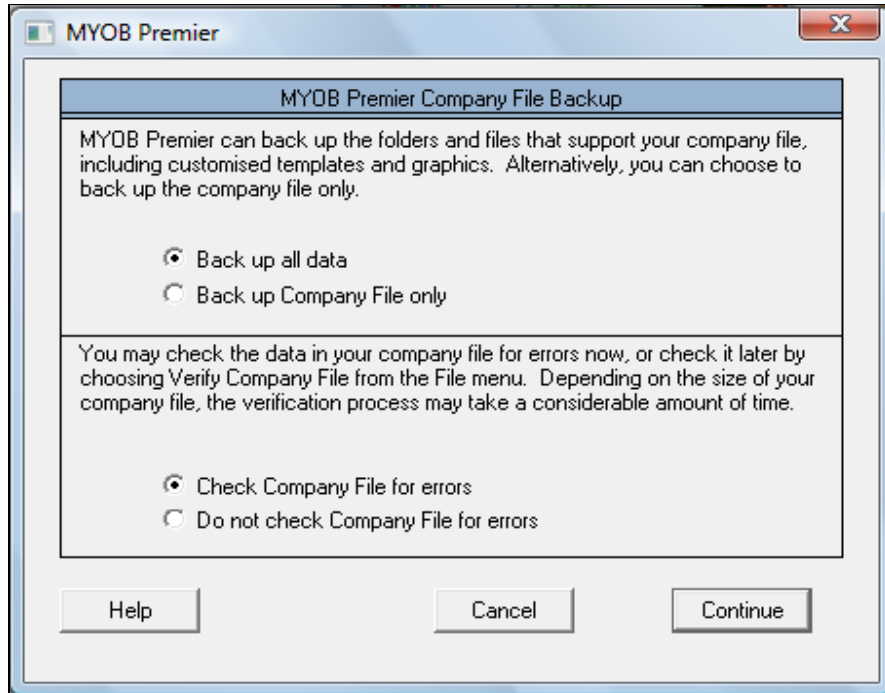
- **CD-R** - This is the most widely used type of CD. Please note that data can only be **copied** to these CDs by using the software supplied with the CD writer. Therefore, MYOB cannot **save** data (backup) direct to a CD-R type CD. For information on copying data to a CD-R type CD, please refer to your CD writer's operating instructions.
 - If using this type of CD for archiving data, backup your MYOB data to your hard drive and then use the CD writer software to copy the backup zip file to a CD.
 - **CD-RW** - This type of CD is known as a re-writable CD, as data can be both written to, and deleted from it. Software which is supplied with some CD writers allows for this CD type to simulate a hard drive. This means that data can be saved directly to the CD.
 - If you are using a CD-RW type CD, and, your CD writer software includes this feature, then you will be able to backup your MYOB data directly to the CD (See the **Note** at step 2 of *How do I backup my MYOB data?*). However, you will need to refer to your CD writer's operating instructions on how to activate and use this feature.
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How do I backup my MYOB data?

To backup your MYOB data, please follow the following steps:

Step 1 - With your Company File open go to **File** and select **Backup**.

The window below shows the **Company File Backup** window.



The **Backup all data** option will include the following data in addition to your Company file :

- Customised forms and reports.
- Changes to Excel spreadsheet report templates.
- Customised mail merge report templates.
- Images linked to cards and inventory items.
- Payment Summaries created during the End of Payroll Year process

On a day to day basis, a backup of your Company file only will be sufficient. However it is good practice to periodically perform a full backup of all data.

We recommend you select the **Check Company File for Errors** option. This will verify your Company File for errors before backing it up.

Step 2 - Click **Continue**.

The picture below shows the **Backup** window, which will then be displayed.

Note: The Backup window may appear slightly different to that shown depending not only on your version of MYOB Software but also on your version of Windows. However, the principals of specifying the file name and its destination drive/folder are the same.



Using the **Save In** menu along the top of this screen, select the destination drive for your backed up data. After selecting the drive, the folders of that drive will appear in the main panel. Double click the folder icons to navigate to the folder where you would like your backup data to be stored.

In the window shown above, the user has created a folder named **MYOB Data Backup**. In this example, by double-clicking its icon, the MYOB Data Backup folder is selected as the destination folder. Currently, the **Premier12** folder, as shown in the **Save In field** in the rectangle, is the destination folder. If you are using MYOB Accounting/Plus the folder will be called MYOB 15.

By default MYOB will use the system date (in the American Date format and with the MYOB prefix) to name the backup file in the **File name** field in the red rectangle. This name can be easily changed by placing your cursor in the **File Name** field and over typing the name of your choice.

We recommend giving the file a name that will help you identify exactly when this backup was taken. For example, **2008-5-27 AM** or **BankLastReconciled-30-4-08**. When renaming the backup file, it isn't necessary to include the 'zip' file name extension.

Note: If using CD-RW type CDs, and the software supplied with your CD Writer allows this type of CD to simulate a computer drive you should be able to select the CD writer when clicking the **Save In** menu. Refer to the operating instructions of your CD writer software.

Final Step - Click **Save**.

MYOB will then begin to backup your MYOB data to the destination drive/folder.

How do I restore my MYOB data?

If restoring or opening your MYOB data from a CD-R type CD

Please refer to the section titled *How to open or restore my Company File from a CD*.

What happens when my MYOB data is restored?

When restoring MYOB data, your MYOB program reads the zip file and then creates a duplicate of the Company File(s) as it was when it was backed up. Once restored, MYOB will open the Company File.

Before restoring your MYOB data

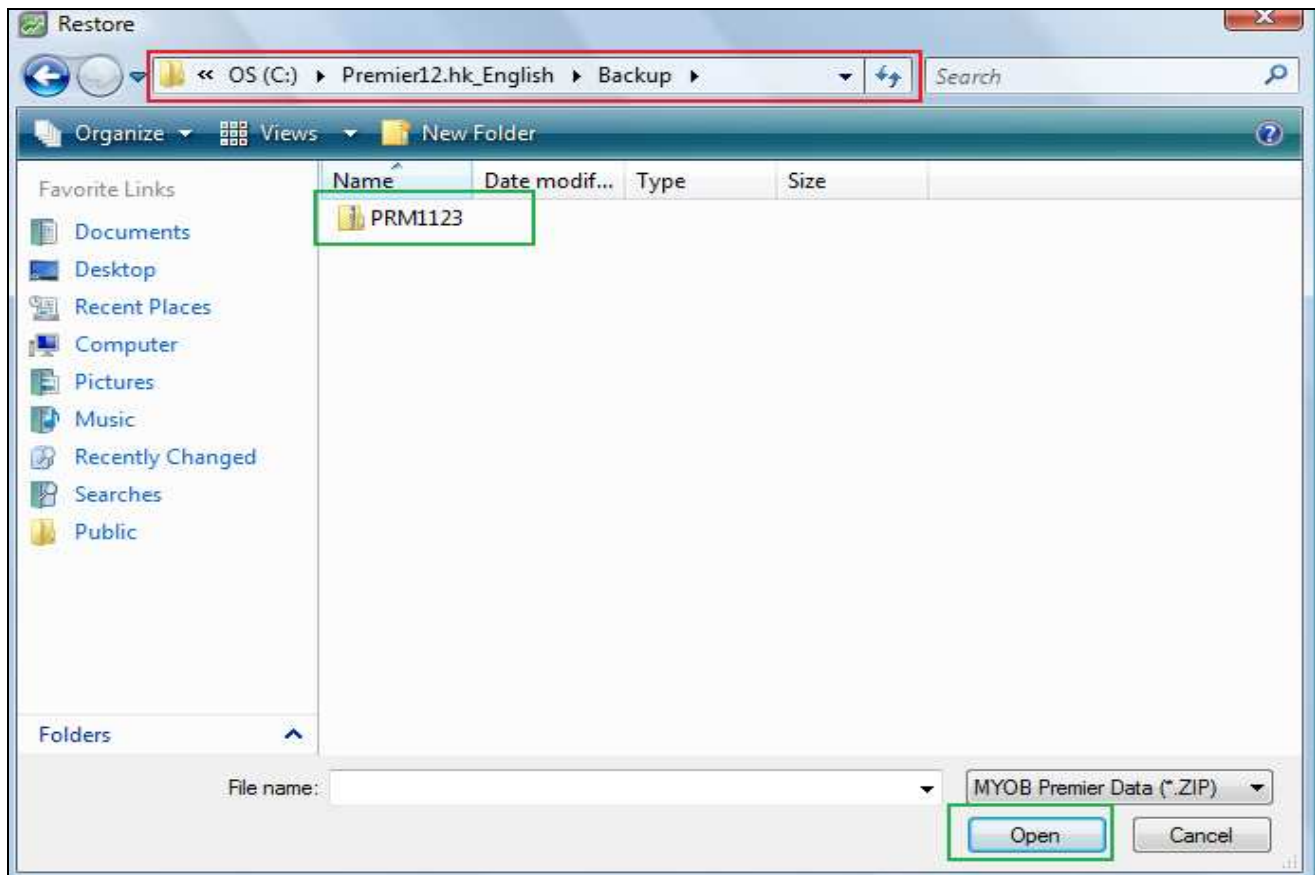
We recommend you use Windows Explorer to create a new folder on your hard drive into which your MYOB data can be restored. This will prevent the possibility of overwriting your current working data.

Restoring your MYOB data

Previous versions: The various windows may appear slightly different to those used in the examples. However, the principles of navigating through these screens will be the same.

Step 1 – With your current Company File open, go to **File** and click **Restore**, then follow the prompts.

Step 2 - With the **Select File to Restore** window displayed, click the **Look in** menu shown in the red rectangle and select the drive containing your MYOB

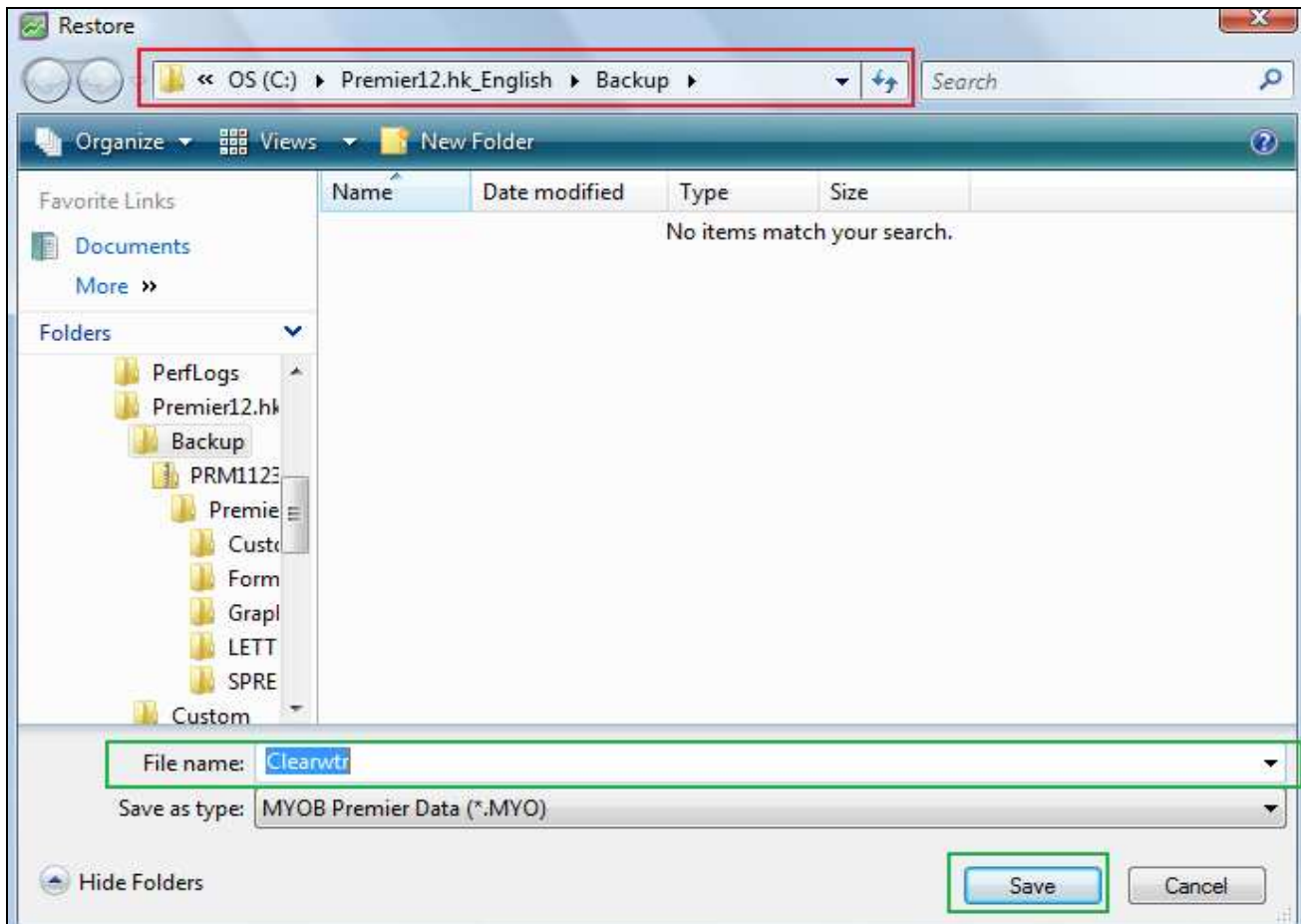


After selecting the drive, the folders of that drive will appear in the main panel. Double click the folder icon(s) to navigate to the folder where your backup data was saved.

Once the backup file appears, you can click it and select **Open** or simply double-click the file.

Note: If you are unsure of where your backup data is stored, use the Windows **Search** function to search for files with a 'zip' file name extension (please refer to Windows Help for information on how to search for files).

The picture below shows the **Save As** window. The Restored MYOB Data folder as shown in the **Look In** menu, was created by the user for the purpose of saving restored Company file.



If you want, you can change the **File name** which appears in the rectangle shown in green. By default, MYOB will use the name of the backed up Company File as the name of the restored Company File. To change the default name, place your cursor in the **File Name** field and over type it.

Step 3 - Click **Save**.

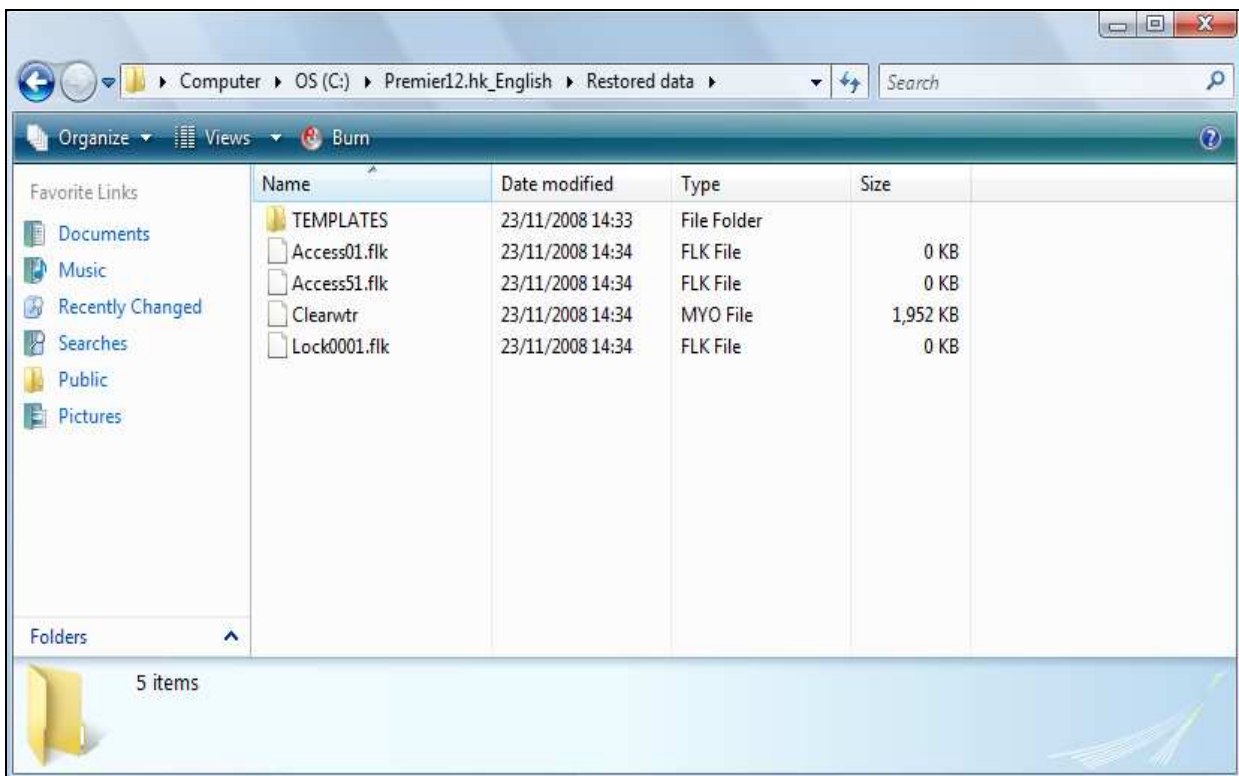
MYOB will then begin to restore your MYOB data to the destination folder. Once restored, MYOB will open your Company File.

The backup all data option was used to backup my MYOB Data. What data has been restored?

MYOB will restore your MYOB Company File to the destination folder selected in the **Save As** window. In addition to this, MYOB will create a folder within the destination folder named **TEMPLATES**. Within this folder will be other folders containing the other MYOB data that was backed up. This explained in the dialog window shown on the next page. It appears when you click **Save**.



The window below shows an excerpt from Windows Explorer after restoring MYOB data that was backed up using the **Backup All Data** option. The Company File (Clearwtr.myo) has been restored to the user created destination folder named Restored MYOB Data. The TEMPLATES folder was also created in the destination folder with sub-folders containing the other backed up data.



Can MYOB data be restored using another method?

There are two other methods that can be used to restore your MYOB data.

From the Windows Start Menu

If MYOB is closed:

1. Open MYOB from the Windows Start menu.
2. When the Welcome flash screen is displayed, click **Open** to display the Open window.
3. Click the Files of Type menu along the bottom and select All Files (*.*). You can now follow on from step 2 of the section titled *Restoring your MYOB data*.

Using a third party application

MYOB's backup function uses a common industry compression technology. Therefore, your MYOB data can be restored by using most third party utilities including, Pkzip and WinZip.

How do I restore/open my MYOB data from a CD?

CD-RW type CDs

If your CD writer software enables you to access a CD-RW type CD as an additional drive, then you should be able to both open and restore a Company File from the CD writer.

If you are unsure whether or not your CD writer software provides this feature, then follow the below information for CD-R type CDs.

CD-R type CDs

Restoring a Company File

MYOB data that has been backed up (in a zip format) and copied to a CD, can be restored directly from the CD by following the steps from the section titled *How Do I Restore My MYOB Data* – at step 2. At step 2, you should be able to select the CD from the **Look In** drop down list.

As MYOB cannot write to this type of CD, you will need to specify a folder on your hard drive into which the restored file will be saved – see step 3.

Opening a Company File

MYOB writes data to Company Files when opening them. Because MYOB cannot write data to a CD-R type CD, when opening a Company File directly from one of these CDs, an access error (usually an I/O error) will be reported. The following steps explain how to overcome this error:

1. Using Windows Explorer, copy your Company File from the CD to your hard drive.
2. Once you have copied the file to the hard drive, highlight the Company File then go to **File** and choose **Properties**.
3. Clear the **Read Only** option then click **Apply** and then **OK**.

The Read Only file attribute is applied to all files when copied to a CD, and remains as Read Only when a file is copied back to the hard drive. When active, this attribute prevents data from being written to a file. Therefore, before MYOB can open a Company File copied from a CD, the Read Only attribute will first need to be disabled.

For detailed information on using Windows Explorer and changing file attributes, please refer to Windows Help.

You will now be able to open your Company File.