This Factsheet discusses:

- using a USB key to Backup **SmoothPay** data, and

- shows how you might *Restore* **SmoothPay** data from a USB key to a different machine

- and it is assumed you are using a computer with Windows XP or later.

USB keys are a solid-state (no moving parts) *Backup device*, and provide a fast, convenient and robust method of storing data.

A 1 Gigabyte USB key will hold more data than a CD, so there's plenty of space not only for **SmoothPay** *Backups*, but also for your *accounting system backups, documents, photos* etc.

Plug It In

Connect the USB key to an available USB slot on your computer. You can and should do this while your computer is on.

USB slots are often on the front of modern computers, otherwise you'll find them at the rear, or sometimes (on Laptops) on the side – they look like this:

Windows will automatically assign a drive letter to the USB key, usually D: or E:, but depends on what other *devices* you have connected – we'll come to that in a moment.

Backing Up SmoothPay data

Start **SmoothPay**, and choose *Backup*. In the following example, we've selected "Other folder", and clicked on the *Lookup button* to locate where the *Backups* are to be placed:

- Tick *Other folder* as the *Backup* location. SmoothPay will keep up to 20 occurrences of your *Backup data* in the specified location.

- Click the *Lookup button* (underneath the *Other Folder* field) to display an Explorer dialogue.

- *Navigate* to your USB key – it'll be under the *My Computer* or *Computer* heading. In this particular case it's *Kingston (E:)* but on your computer it may be something else, like Removable Disk (D:) or K: or W:
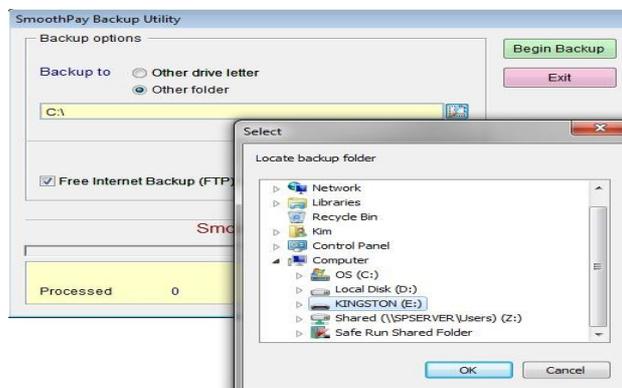
- Click *OK*.

- Choose *Begin Backup*. Your *archive data* will be placed into the specified location, a subfolder called *Archive*, numbered according to the current Company selected – *001, 002* etc


Warning: Drive letters for your USB key may change!!

Windows automatically allocates Drive letters, although you may allocate a specific Drive letter for individual USB devices if you know how. It does this generally on a first-come, first-served basis.

So, if you plug in your new digital camera, it'll be allocated a Drive letter, if you then plug in your USB key it may be allocated a different Drive letter to the one used last time.

It also means, that if you take your USB key from one computer and plug it into another computer, you may be transferring data etc, then it could be allocated a completely different Drive letter.

To check what Drive letter has been allocated, simply, click the [icon] icon in the system tray (bottom right of your Screen), and a list of connected USB storage devices will be displayed:
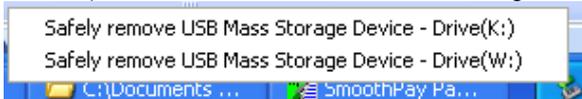
In this case, Drive K: is a Camera, they are given drive letters too, and W: is the USB key. Obviously, it will be easier to figure out if you have only one device connected.

Transferring data to another Computer via USB key

Lets assume you're moving your data to a new computer, or you keep a copy of **SmoothPay** offsite or at home for processing or safe keeping.

🔵 You have *Backed up* your data as above.

🔵 You will then plug the USB key into the new/other computer.

Start **SmoothPay** and choose *Restore.*

Note: *Restoring* from an archive REPLACES your data with the data contained in the Archive.
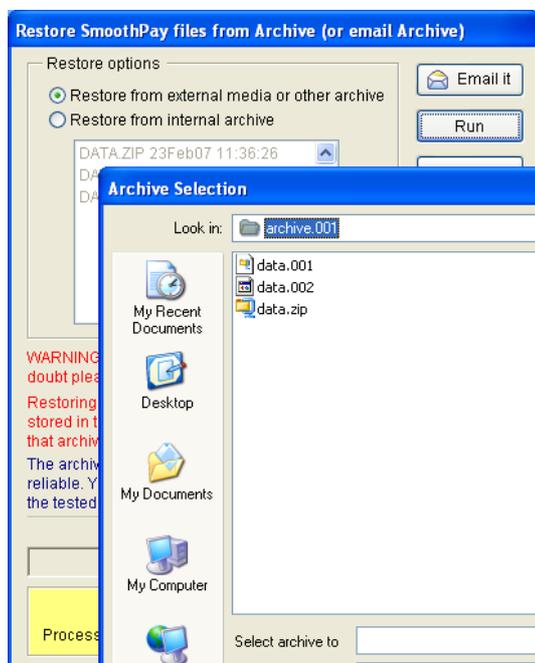
🔵 Click the *"Restore from external media"* option

🔵 Click *Run*

🔵 Navigate to the *USB key Drive letter,* then into the *Archive Folder* for your Company - archive.001 is used by the first Company, archive.002 is used by the second Company and so on)

🔵 The archives are versioned, data.zip is the latest archive, data.001 is the next oldest and so on. Usually, you'll select data.zip. If the "zip" extension is hidden, your Windows options haven't been set up correctly, this is easily fixed by your IT person.

🔵 The *archive* will be tested. If it fails, you cannot *Restore* from the *archive* but this is pretty rare

🔵 If the test is OK, then you'll be asked if you want to *Restore* the data for real. Respond *Yes.*

🔵 Your data files will then be analysed for consistency and compliance, and any compliance issues will be reported. You should resolve these issues as soon as possible.

Feel free to contact our **HelpDesk** if you have any questions or suggestions for improving this Factsheet.

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