Radio Days – 2013-02-23

Tip of the Week – Backup Problems

During the week I had two calls from clients who had trouble doing backups.

SyncToy

One call came from a long-time client who had bought a new computer some months ago. On her previous computer I had installed SyncBack, my favourite backup program. This had run without problem for some years. Her new computer had another backup program, a free one from Microsoft called SyncToy, which appeared to be working but had not done a backup since shortly after it had been installed.

This was because it had filled her backup medium and, every time that she had run a backup, it had failed without a warning stating there had been a failure. The reason that her backups had been failing was that her backup medium was full.

She had then gone to her accountant to take her MYOB data file for year-end processing. Her accountant had not been able to find her data file so they started a hunt to find the problem. She had then tried to do another backup, using SyncToy, onto a bigger backup device. This had failed because SyncToy does not allow you to change the backup medium: you have to create a completely new backup and she, like most people, did not have the skills.

In the end the only solution was to reformat her USB sticks and install SyncBack. The two main advantages of this program is that it can work with any device (you don't have to create a new backup to do this) and that it gives you a warning when your backup has not worked.

The problems with SyncToy are:

- It will not backup to another device without first creating a backup set
- No warning when an error has occurred

I cannot recommend this program.

Windows Backup

Another client used the free backup program which comes with Windows 7. This program had also appeared to work but had taken up all the free space on the backup disc. This meant that no more data could be stored until some free space had been created. This was despite a setting which stated that the program would ensure that there was space on the backup medium.

There was another problem with this program, and that is the way that it does its backup. There are a number of types of backup:

- Full: all needed data
- Differential: all files changed since the last full backup
- Incremental: all files changed since the last backup (either full or incremental)

Windows Backup uses incremental backups. A full backup is stored at the start of a *backup set*. All subsequent backups are incremental and stored next to the last backup in the backup set. This is supposed to make backups quicker and easier but has the unwanted effect that it will take too long to restore all the backups (both full and incremental) if a disaster happens.

The problems with Windows Backup are:

- It is unable to keep enough space on the output medium for the next backup
- Restoring a backup will take far too long if needed

I cannot recommend this program.

The best backup program, in my opinion, is SyncBack SE with its free cousin SyncBack Free in second place.

MYOB Rollover

I had a call during the week from a listener who had been asked by his accountant to print a *Profit and Loss* report. When he went to print the report he discovered that the latest one that he could print was for the financial year ending on 30 June 2007. I asked him to check one setting in the program and, as I had expected, his current financial year was 2007. The only way to print a report for the current year was to roll his data file over.

This rollover had to be done a number of times, until the current financial year was 2013.

Many people are unaware that MYOB needs to complete each financial year in order to print reports for later years. In the beginning this was touted as an improvement over competing products which needed each accounting month to be completed before the following month could be started. This is, indeed, an improvement over those earlier programs but, in its turn, MYOB has been overtaken by improved programs like QuickBooks.

The process of rolling a data file over is quite easy once you have mastered the steps needed to complete each rollover. The problem comes when, as happens all too often, a copy of each year's data file is not made. It is far too easy just to keep the one file and roll it over until the desired current year is reached.

The reason that copies need to be made is that each time a MYOB data file is rolled over it deletes data from the year just finished. This data is needed to comply with ATO (Australian Tax Office) rules which require companies to keep financial data for seven years and people to keep financial data for five years.

If you rolled a data file over to complete the years 2007, 2008, 2009, 2010, 2011 and 2012 without making copies for each of those years you will lose the transactions for those years. This means that you cannot go back and check any transactions for those years because they have been consigned to the "lost for ever" part of the universe.

The steps needed to perform a data file rollover are, in themselves, quite simple. The trick is to remember them and the order in which they should be performed. Here they are: please use this reference when you next need to do an MYOB rollover.

1. If your version of MYOB has this option, click on *File » Verify Company File*. This procedure checks your data file for errors: if there are no errors you can continue with the next step. If there are errors you will have to send your company file to MYOB so that they can correct the errors in your data, if possible. If they cannot correct the errors then you will have to start a new data file.
2. If your version of MYOB has this option, click on *File » Optimise Company File*. This procedure removes all the deleted transactions in your data file to make it as small and as quick to access as possible.
3. Click on *Setup » Company Information*. Write down the number next to *Current Financial Year*. This is the year that you will use if you need to rename your company file.
4. Close MYOB and open Windows Explorer. To open Windows Explorer click the Start button then click *Computer* or *My Computer*, depending on your version of Windows.
5. Navigate to the folder which contains your MYOB data file. This will tax many people because they do not know how to navigate through the directory structure of their hard disc. If you don't know how to do this navigation (and a surprising number of accountants do not) then you need professional help, preferable from someone who knows how to use both MYOB and Windows. I have, over the years, been surprised at the number of "computer consultants" who do not know how to do this.
6. If necessary, rename your company data file so that it ends with the year that you wrote down earlier. As an example, if your company file is named *The Really Useful Company Pty Ltd* and the year that you wrote down was 2007, you might rename your data file to *TRUC-2007*. This then gives you the information that you need when opening your data file so that you can ensure that you are using the correct one.

7. Now copy this file. To do this, you highlight the file by clicking on it once with your mouse to select it then press *Ctrl + C* (to copy your file to the Windows' clipboard) then *Ctrl + V* (to paste your file into the same folder). Your file will now be named *Copy of TRUC-2007* or *TRUC-2007 – Copy* depending on your version of Windows.

8. You need to rename your data file so click on the copied file to select it then press function key F2 at the top of your keyboard. You can now rename your data file to *TRUC-2008* to show that it is the next file in sequence.

9. Now start MYOB again and open your new file: *TRUC-2008*. Now is the time to roll your data file over. From the menu select *File » Start a New Year* or *File » Start a New Year » Start a New Financial Year* depending on whether your version of MYOB has payroll. Depending on the size of your file and the speed of your computer this could take an hour or more.

10. The next step compacts your data file. Depending on your version of MYOB you may or may not have to do it. If your version of MYOB has the menu option you must select *File » Optimise Company File*. Once this is done you can then relax because you have now completed the roll-over of one financial year.

My caller had to roll over his MYOB data file a few more times. This means that he needs to repeat steps 4 to 10 for each year whose rollover he needs to complete.

I advised my client to ensure that he had taken a backup of his MYOB data file before sending it to his accountant. This is just in case his accountant had not copied his data file before each year's rollover. This would give him security if the worst happened and his accountant forgot step 7: copy and rename your data file.

I know that this list of steps seems intimidating, but in reality each step is simple if you have these basic computing skills. Unfortunately, too many people do not have what I consider to be these basic computing skills so they are at a disadvantage when it comes to following the instructions in the list above. For these people there is only one option: get professional help.

Further Information

SyncBack   www.2brightsparks.com