I've been told a Backup Procedure is a MUST– 5 Steps for Designing a Backup Process

Backing up and testing backups helps ensure mission-critical information is available if your business experiences a loss due to human error, computer virus, hardware or system failure, software corruption, theft, or natural disaster. Achieving this goal is a **5 Step Process.**

First, understand **(1) WHY** you are backing up. Determining the purpose enables you to clearly define **what, how often**, **where** and **how** to backup. For example, is the backup performed for data protection, disaster recovery purposes, or other reasons.

Decide **(2) WHAT** to back up. The answer is highly personal and depends on your business needs. Anything you cannot replace easily is a candidate for backup.

Make a checklist of mission-critical files to back up. This will help you determine what to back up, and give you a reference list in the event you need to retrieve a backed-up file. You don't need to back up Windows Applications, such as Microsoft Word. If the worst happens, you can always re-install those programs from CDs. Some files to consider backing up include Bank records and other financial information, Customer Databases, Inventory and/or sales records, Address book(s) and calendar(s), Application Settings and Windows Registry for each computer.

Calculate the size of the data you want to backup – this has a bearing on **Where** and **How** to backup. The more you backup, the more expensive and time consuming it is to backup and restore.

(3) HOW OFTEN is often enough. This is a cost/benefit/risk trade-off decision. For a backup to be useful it needs to be recent. Questions to consider include: How much data can you afford to loose? How hard will it be to recreate the lost data (i.e. data added since the last backup)? How much does each backup cost in time, trouble and dollars.

Determine **(4) WHERE** the storage device/media type will be stored. To really be safe, the backup medium (tape, CD/DVD, memory stick/flash drive, external hard drive, third party service) should be stored off-site. If you have a server(s), discuss with your technical advisor options that are available.

(5) HOW the files are backed up depends on the software and type of backup. The software **MUST** support the storage device **(Where)** and media type selected. For example, if you need to backup up data on a PC, you might want to use Microsoft's BACKUP utility to backup data to a hard disk (BACKUP does not support most Removable Media). On a PC with Windows XP Professional operating system, go to:

> Start > All Programs > Accessories > System Tools > Backup.

If you are running Windows XP Home Edition, BACKUP is not installed automatically. Instructions for installing BACKUP can be found with a search in Help.

Last, periodically test the backup to ensure it works.

A Yankee Group survey of IT executives found 42% of respondents had been unable to recover data from tape in the last year as a result of either media failure or operator error. Another study revealed that over 35% of companies do not test their backups and of those that tested, 77% found their tape backups failed to restore.

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