

End-of-Day Procedure: Copy All Files to USB Drive

Introduction. The TaxWise TY 2009 edition has simplified the end-of-day backup procedures. This will outline the backup procedures you can use to make backups of your tax files to a USB thumb drive quickly and easily.

You will need to know whether you are starting a new backup or adding to an existing backup. That is, are there any existing backups already on the USB drive or are you the first of the day? You will also need to know today's date. Now, insert the USB drive into an empty slot.

Procedure.

1. Click **Tools**, then **Backup to Disk...** (Or just type Ctrl-B.) You will see a box like that on the right.

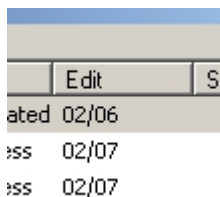


Click the button corresponding to your situation: starting a new backup or adding to a previous backup.

2. The next screen to be shown (in either case) will ask you to choose a user to back up. If you are still logged in as Orange, this user name will be highlighted. If not, click **Orange** to select the Orange user.
3. Next you will see a box containing a list of randomly selected letters and numbers that represent the tax returns on the computer's hard drive. The important thing in this window is the check box labeled **Wide Format** near the lower left corner. Click the box to check it.



4. When you click the **Wide Format** button you will see a list of all the files in "human form" including the taxpayer names, SSNs, etc., AND the edit date near the right side of the window. Clicking any column heading on this list will cause the list to be sorted. Clicking a heading a second time will sort the column in reverse order.



	Edit	SI
ated	02/06	
:ss	02/07	
:ss	02/07	

Click the **Edit** column twice to sort the list by date, newest first, which will show you the returns on disk with today's returns on top.

5. Next, click the check box to the left of each return you worked on today, and click **OK**.
6. Finally, choose the USB drive ID from the resulting screen and click **OK**. If TaxWise senses returns already on the USB drive, it will ask you to confirm that you want to overwrite them. Click **Yes** if so. Then click **OK** after the **Backup Complete** message is displayed, and the backup procedure is complete.
7. Remove the USB drive and return it with a photocopy of your log to the Site manager.

End-of-Day Procedure: Copy All Files to USB Drive

Checking Your Backup.

How do you know your backup “took” and you got all the files you think you wrote on the USB drive? Here’s how to verify the backup:

1. On the TaxWise menu, click **Tools**, then click **Restore from Disk...** (or just type Ctrl-R).
2. On the resulting window (“**Select a directory that contains...**”), choose the USB drive from the Drives pull-down menu and click **OK**.
3. Click **Orange** (if not selected already) and click **OK**.
4. The resulting window (“Restoring to: C:\UTS...” or similar) has a Wide Format check-box like the backup window. Click it:



The resulting “wide list” shows only the TaxWise-assigned “funny name”, the primary taxpayer’s SSN, and the “package”, which will always be 1040 Individual.

5. Unless your memory is really good and you remember all the primary SSNs of your clients for the day, you will need to compare the “funny names” shown in the restore list to those in your log. (Remember that you can click the File Name column header to sort the list. Also, ignore the “9I” characters that begin each file name.)
6. If you were not the first person of the day to run a backup, there ought to be files on the drive that are not yours. If not, contact the site technical manager immediately!
7. Once you verify that all your files are there, click **Cancel** to abort the restore, and then **OK** on the “**Restore cancelled**” information box.

OOPS!

If there is a discrepancy between your expectations and the Restore list, it will take one of three forms:

- If some of your files are there, but not all of them, you will need to run the backup again (after you cancel the restore). Choose Add to a previous backup, and select the file(s) you found missing to back up. This is not much of a catastrophe, and can usually be done surreptitiously.
- If none of your files are there, you will need to rerun the backup procedure again from the beginning. Again, this is not a disaster, although you might want to see if you can find out WHY no files were backed up..
- If some or all of your files are there, but no others, and you were not the first person of the day to do a backup, notify the site technical manager immediately. Correcting this will cause a major inconvenience to others, but must be done before the shift is completed. Otherwise the returns you (and your co-workers) thought were on the drive will not be, causing delays and consternation among the VITA office staff.

In any case, after correcting the problem, rerun the “Checking Your Backup” procedure.