

## Easy Clinic Software Admin Recommends: Back-up your Files Regularly

Dear Easy Clinic Software users:

Patient Filing is a very important part of our practice. Thus, it's really disappointing when there are computer errors that will affect our months to years of patient record keeping. As you noticed that we truly emphasize the need for you to do daily back-ups to assure that you won't need to start from zero when software errors happens.

For Windows Xp, Windows Vista and Windows 7 owners, you need to religiously do the Daily Back-up as explained in our PDF in this link [http://www.easyclinicsoftware.com/dailybackup\\_4.9.pdf](http://www.easyclinicsoftware.com/dailybackup_4.9.pdf) .

My good news is that if you are a **Windows 8** user, the Backup thing will become much easy and automatic and you can even set it to back up every 10 mins. , every hour or just click the back-up button and it will just do its intelligent backup by itself using the new **File History Feature**. I call it intelligent backup because it will not overwrite the old version of the previously saved files and we can just retrieve it back easily if necessary.

I really recommend that you use this feature, so that whatever happens, like a wrong command that may cause errors, it would be very easy to retrieve the good file back, based from the last back-up in a few clicks. So if for example the File History backed up your program automatically an hour ago before the error happened, you can just bring back its status just an hour back.

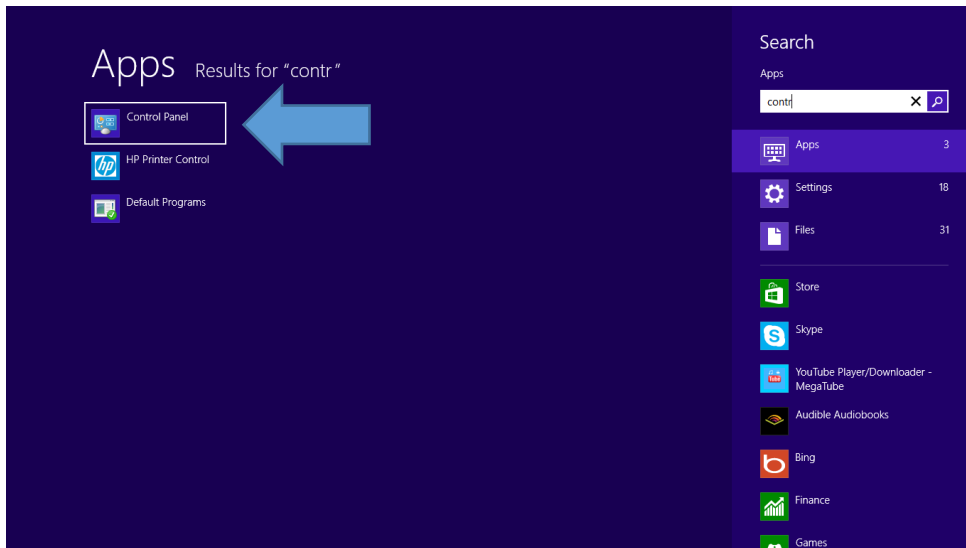
Respectfully,

Richard T. Mata, MD, DPPS  
Admin  
Easy Clinic Software

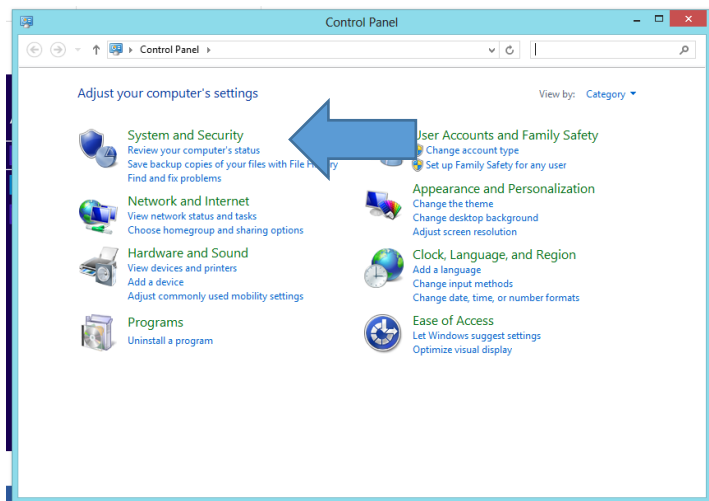
# How to Use **File History** to Backup Patient Files (Windows 8 Users Only)

First let's make a shortcut Icon for **File History**. Because it's going to be used more often by you now, we need to place an obvious icon for you to easily open it daily in your clinic.

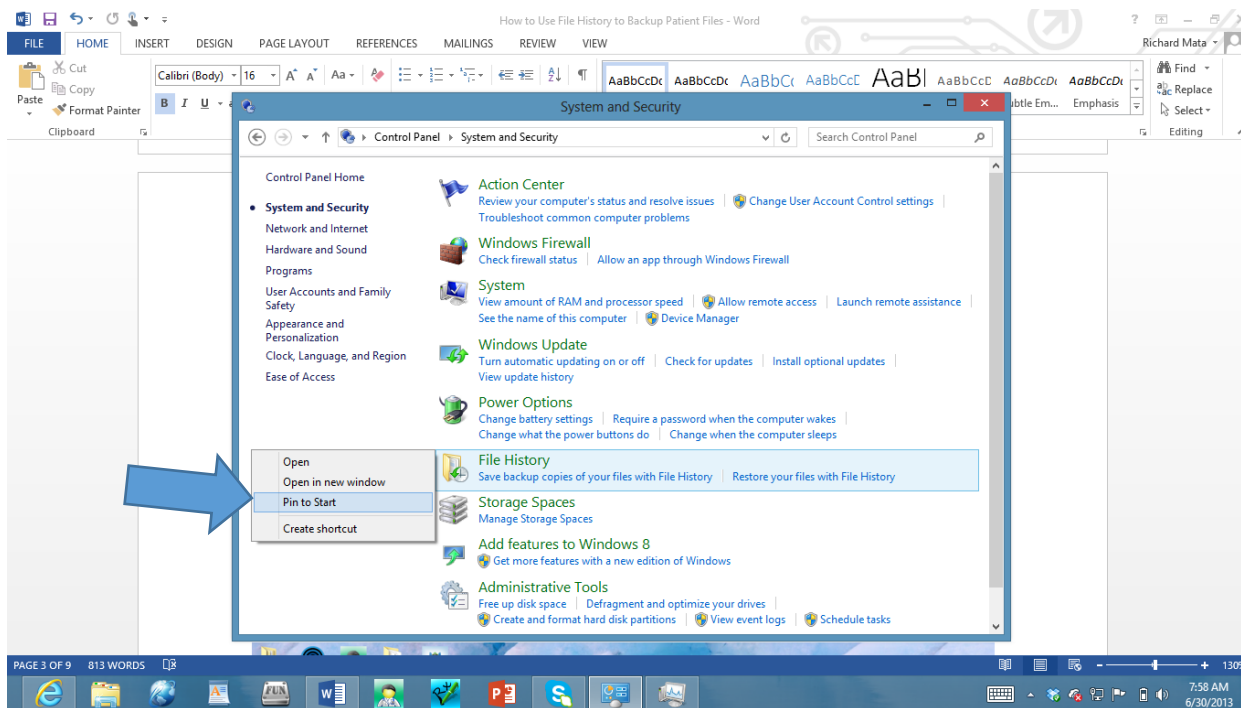
Now let's look for it first. Type Control Panel at the tiles area and click it to open



Click System and Security



Right Click File History folder and click **Pin to Start** to place a shortcut as a tile and also right click it again and click **create shortcut** which will add a shortcut at the Desktop. Go check the desktop and the start tiles, you will see it there.



## Now let's proceed with the settings...

I realized that File History of Windows 8 won't backup files inside Local Disc C or Dropbox folder which are actually the locations I used where the MyPatients5 folder as mentioned above. But don't worry it's not going to be a problem. We just need to transfer to a location that is included in File History Backup and just reconfigure Patient Files to be viewing the new location.

Before I proceed, I would like to refresh you that the most important folder for the software Patient Files 5.0 or Patient Files 4.9 is the **MyPatients5** folder (if you are still a Patient Files 4.0 user, it's the MyPatients4 folder). This is the folder that contains the databases that gets updated when you are using Patient Files program. By default the MyPatients5 folder is kept under Local Disc C upon installation. But if you are already doing file sharing with your secretary's PC in the clinic, then most likely its now inside the Dropbox folder if you followed the manual titled [How to Use Dropbox to Sync files in Patient Files Pro 4 \(Windows\)](#)

My suggested folder where we will transfer the MyPatients5 folder that is backed up by **File History** is the **Documents folder**. Please proceed as follows...

If the **MyPatients5** folder that you are currently using is located in its original location which is inside Local Disc C, please do the following:

1. Go to local disc C and do a right click on the MyPatient5 folder and click copy, and go to the Documents folder and just paste it there inside.
2. Make a Configuration in Patient Files as follows:
  - a. Open Patient Files icon
  - b. Click the x at the upper right corner of the small intro box
  - c. Click Configure
  - d. Click Other Custom User at drop down menu
  - e. Click new User Name,
  - f. **Type Patient Files\_Documents at the space for User Name**
  - g. **At path to PDB files click Browse button, and go to the Documents folder and look for the newly transferred MyPatients5 folder there and click OK.**
  - h. Exit Patient Files and re-open it again.
  - i. Now change the Select Handheld User to the new location **Patient Files\_Documents (Desktop Only).**
3. Congratulations you have already transferred to an area that can be backed up by File History!

If you are an advanced user and you have managed to be place MyPatients5 folder inside the Dropbox folder for the file sharing purpose with your secretary, do the following:

1. Simply relocate the position of the Dropbox folder.
2. To do that do a right click at the Dropbox icon at the lower left part of the PC then click the gear icon as arrowed at Figure 1.
3. Click Advanced (arrowed red in Figure 2),
4. Click Move (green arrow) and locate the Documents folder and save it there
5. Click Ok and it will now transfer the Dropbox in a few minutes inside Documents folder.

Figure 1

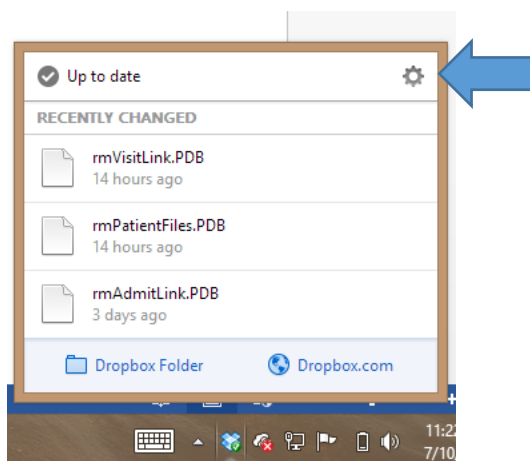
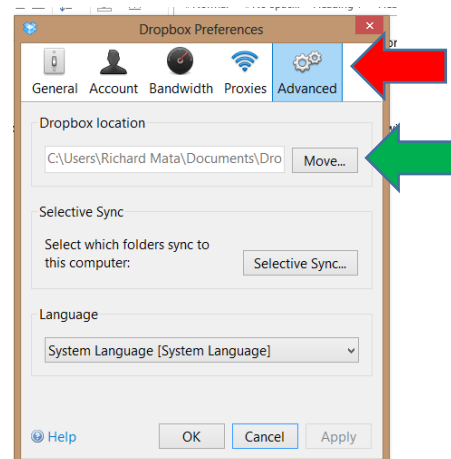


Figure 2



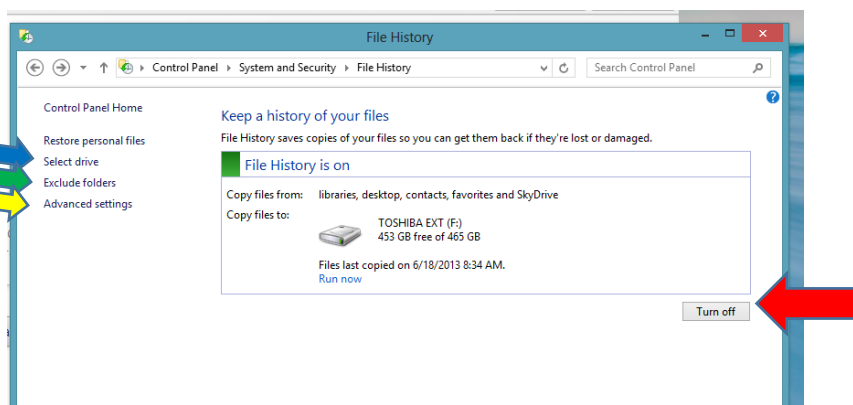
6. Now you need to configure again Patient Files so that it will be looking at the new location of the MyPatients5 folder inside the Dropbox folder.
7. And remember if you are using Dropbox for file sharing with your secretary by doing Merging technique through dropbox, it means you will do 2 new configurations: One pointing to your own MyPatients5 (doctor's PC) and the other one pointing to the secretary's MyPatients5 folder that is also differently located inside the Dropbox folder. I suggest the New User name of your own is **Patients\_Documents\_Dropbox** and the other user name

pointing to your secretary's MyPatients 5 will be **Secretary\_Documents\_Dropbox**, although you can use any words that won't cause confusion on your part.

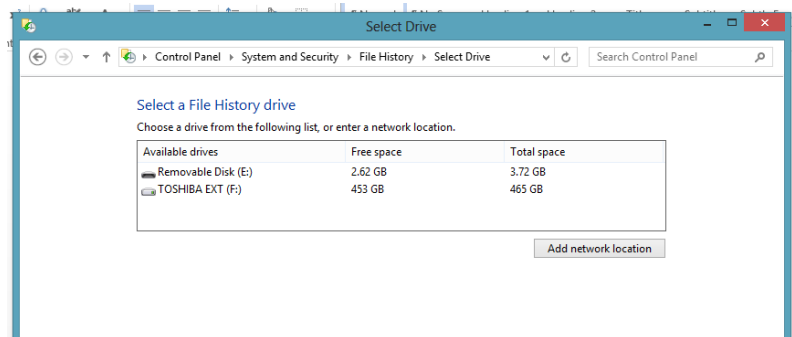
## Now Let's Proceed Setting up the File History:

1. Attach a USB flash disk a least 32GB or more. Although, ideally the external hard drives with 500GB are better so you can back-up without limits (including your personal videos and photos)
2. Open File History, we already made a shortcut for that at the tiles or at the desktop
3. Turn it On (red arrow)
4. Click Select Drive (blue arrow)

Figure 2



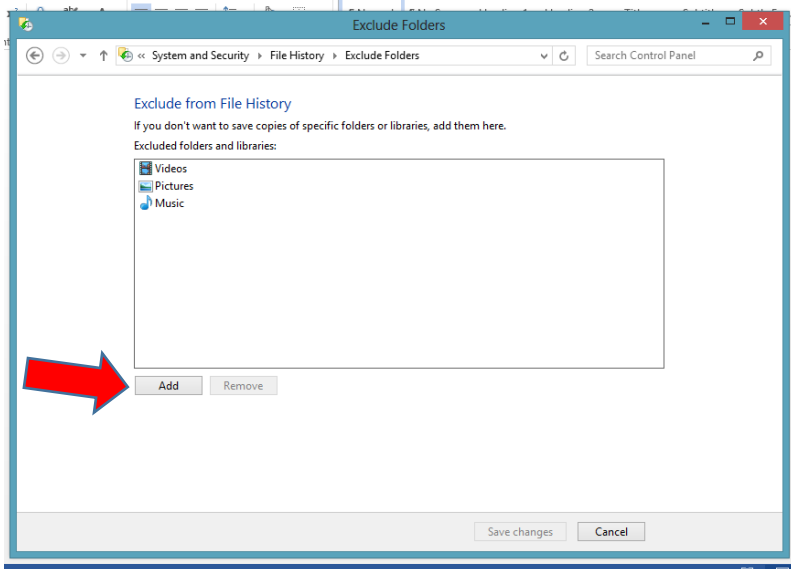
Choose the USB disk that you placed. Click OK



Now Click Exclude Folders on the left panel.(Green arrow at Figure 2 above)

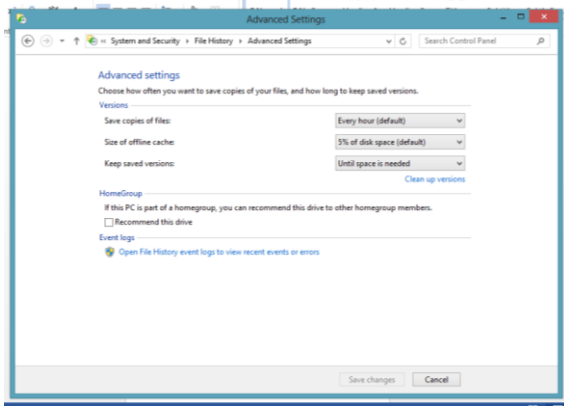
Click Add button (red arrow below) to add folder you don't want to backup. Of course if you are using a small memory USB disc, you need exclude Videos, Pictures and Music. But don't exclude Documents Folder which is our recommended folder. If you have a large 500GB external hard drive then I suggest you don't need to exclude anything so all your personal files will be safely backed-up.

Click Save Changes



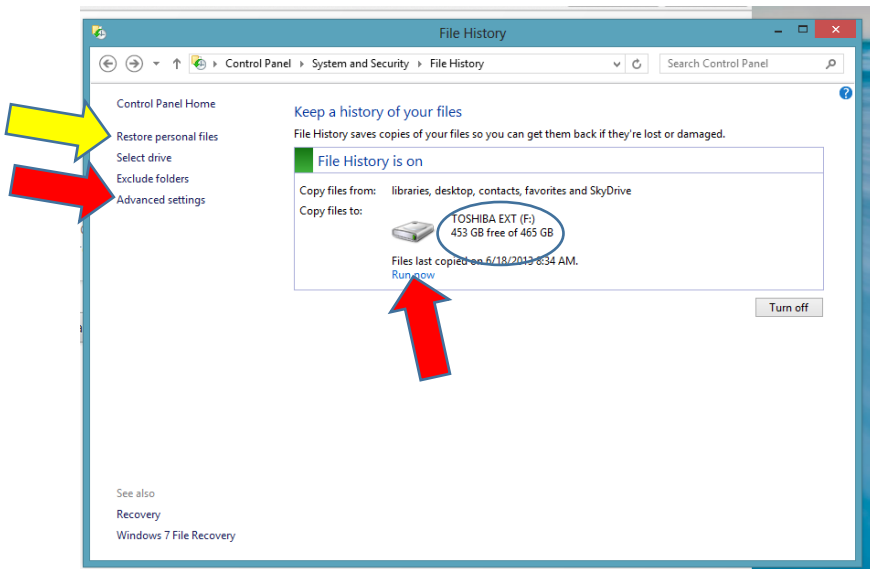
Click Advance Settings (yellow arrow figure 2 above)

Below you can adjust the Backup to every 10 minutes, to every hour etc, thus makes it safer than daily backup. Click Save Changes



Now after setting this up you expect the computer to do automatic back-up your files if the USB memory is attached. But I would like to warn you that sometimes it's not that automatic. It is really good that you open File History and check it if it really did perform the automatic backup you scheduled. You will see the time encircled below.

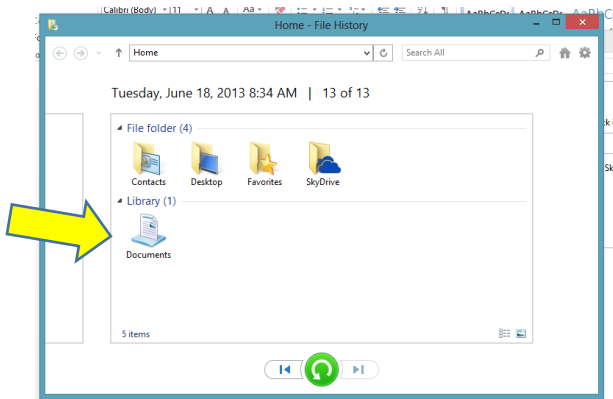
My advice is that you don't only depend on the scheduled automatic back-up but also do a push a back-up manually. At the figure below you can click **Run Now** if you want to backup immediately apart from the scheduled time (highly recommended you click this "Run Now" time to time). Which I do practice during clinic time while using Patient Files software. As you remember we made a shortcut icon for file history in this manual so we can just open it easily and just minimize it in the background and open it again to click the Run Now button.



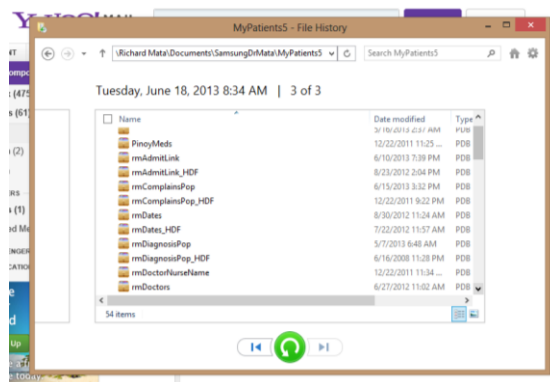
## Troubleshooting:

Now for example, an error happened and the records in rmVisitLink database disappeared (just an example) because of a wrong command, you can easily restore it by doing the following. First close Patient Files program. Now Open File History, Click Restore Personal Files, arrowed yellow on the above figure.

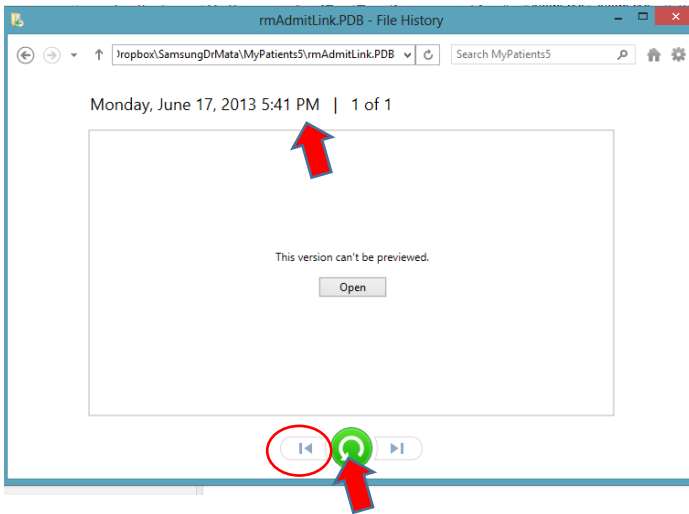
Click Documents icon below:



Then look for MyPatients5 folder inside documents and open it, look for rmVisitLink the one without HDF (example only) and click it open

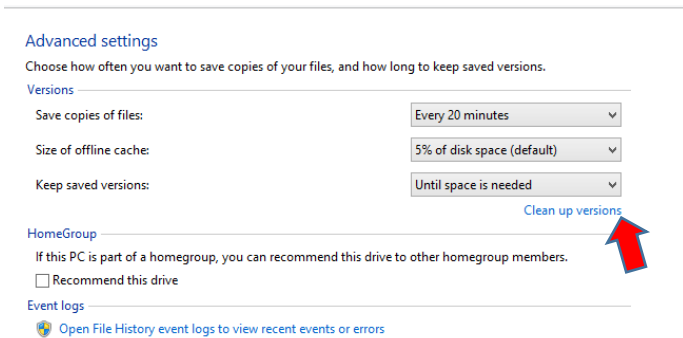


The figure below is what you will see next. It says This version can not be previewed but its ok, you don't have to preview it, just look at the time arrowed below. You may click the circled arrow below to go back in time where it was saved, then click the green restore button and it will be restored to its uncorrupted status! Thus if you did backed up properly a few minutes before the error happened then you have restored everything easily. Now open Patient Files software again and check if it was corrected.



**What if your USB memory is almost full, you can delete the past events to loosen up:**

In File History, click Advance settings and you will see this figure below, now click Clean up versions.



Now you will have the option in the pop-up below:

