

## Appendix E Taking Control of Backups

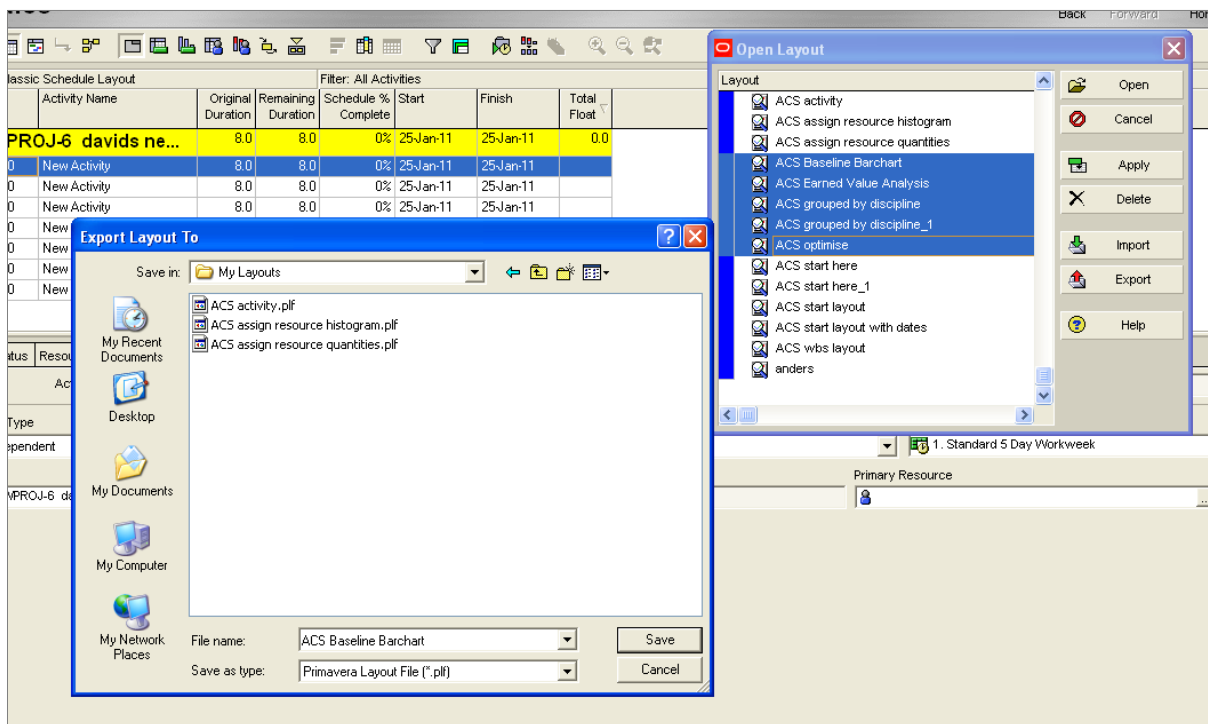
### Data backup

This is a different world for the users of P6. A project is NOT a file. The IT department cannot restore a single project from last night's backup without a prodigious amount of effort. There is a single P6 database, with everyone's projects in it. It is important that users consider taking their own occasional backups.

### Layouts

Another new issue is the fact that layouts are not necessarily part of the project, unless the option to create project specific layouts has been used. I have no great philosophical objections to this, indeed there may well be a net advantage in some environments. I also know that the P6 manual says that when you backup a project you backup its project specific layouts as well. That may well be true but as of today (9<sup>th</sup> March 2011) I do not know any mechanism to restore them with the project!

So in all cases a separate backup of layouts should be taken. This is very easy. Simply go to the normal Open Layouts dialogue, and CTRL-click all the layouts that you want to secure, and chose Export from the menu on the right.



The biggest cause of rework in P6 is bad layout control. It takes one second to turn each layout into a .plf (Primavera Layout File) extension file.

## Projects

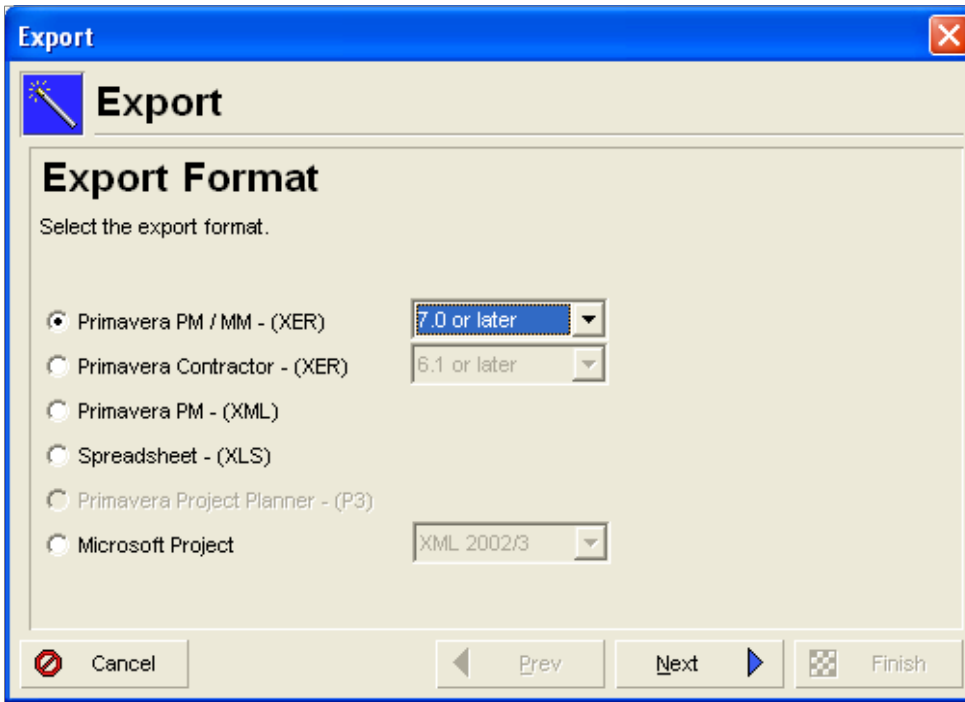
Projects can be copy/pasted with ease in the P6 database, but our rolled up, integrated plan requires only one version of each project to be present. We also do not want the live database to be cluttered with backup copies of data that we may never use.

There are two ways of making external copies of projects.

Mail – this is my preferred option, because it is so simple; however it only sends one project. If you have multiple projects open it will only send the one with the earliest create date.

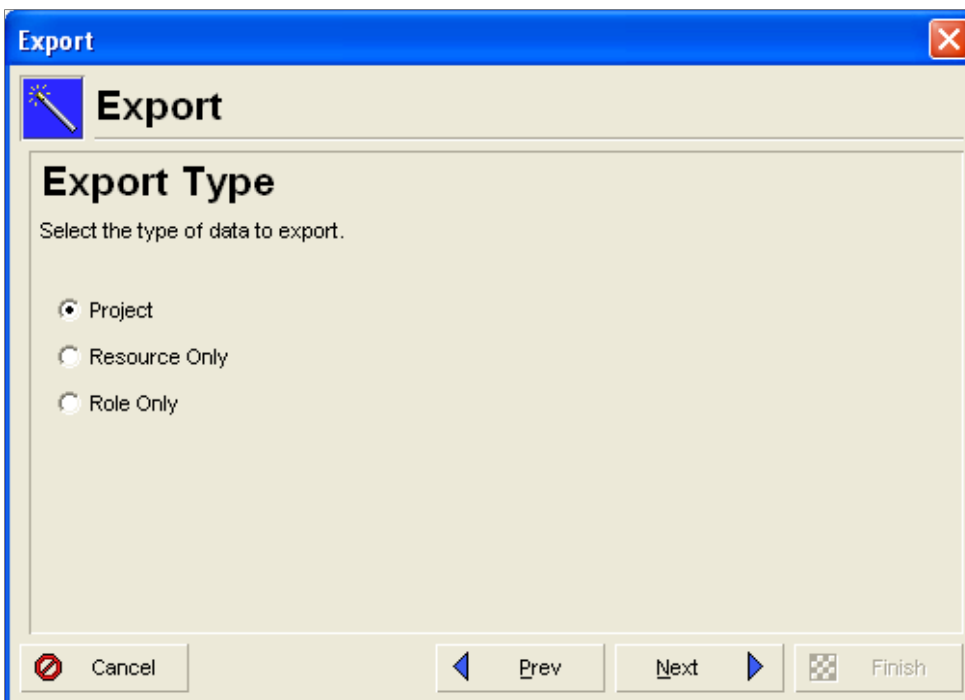
Simply go to File: send Project, and Outlook (it may not be configured if you are using the Citrix environment) will attach the project and ask for a destination address.

Export – this allows any number of projects to be incorporated into a single .XER file. All open projects can be included. The File: Export command



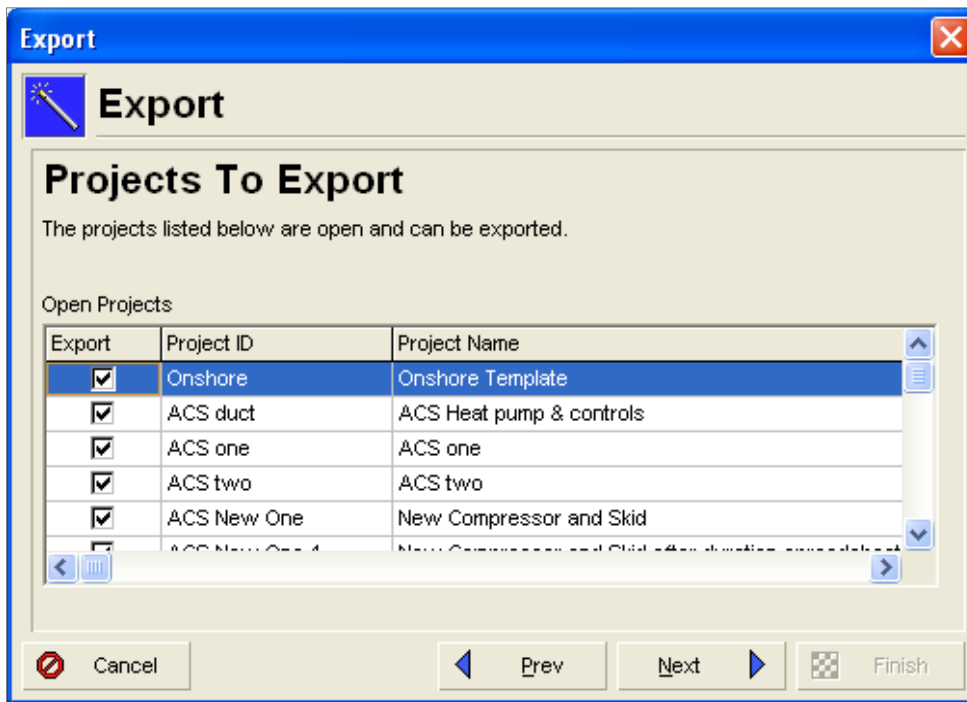
Will offer various export formats. Note that without P3 installed on your computer you will not get P3 as an option now.

Next:



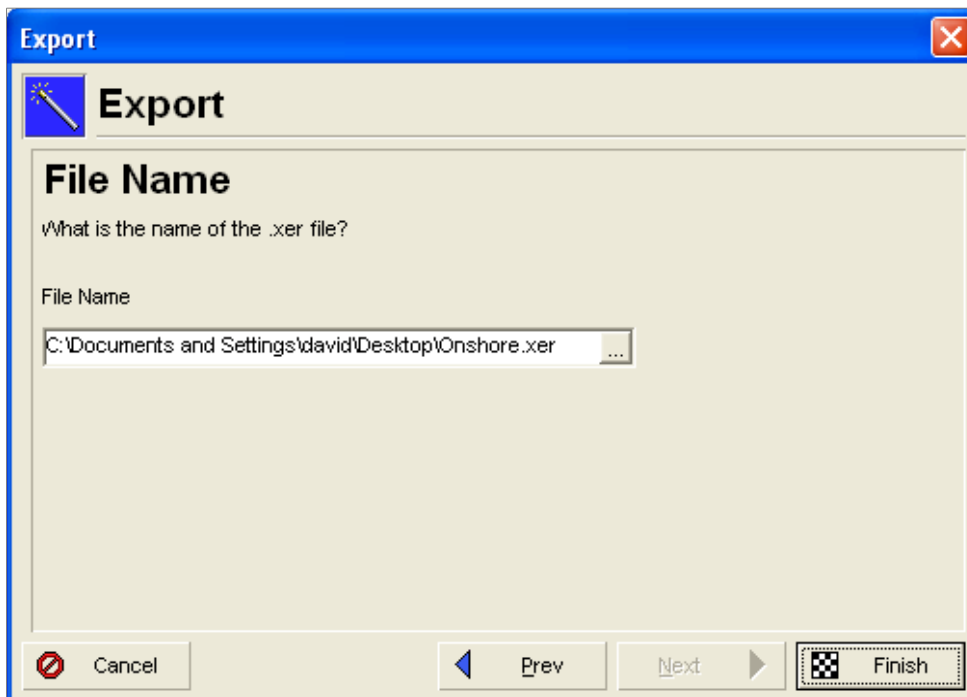
Always chose Project

Next:



All the open projects are selected by default – and if a Restore is required any or all of them can be chosen.

Next:



A filename and directory must be chosen for the .xer file.

## NOTE

The Citrix environment can make this difficult. If you are operating within Citrix and you try and export to your C drive – it can take 100 times longer than creating the .XER file on the Citrix side.