BACKING UP PBI

Phoenix Bell & Intercom

DOCUMENT PURPOSE

The purpose of this document is to instruct the Phoenix Bell & Intercom user how to create and schedule a system backup.

Note: These instructions apply to District Admin and Master Admin users.

This document assumes the reader has the appropriate user credentials, (user name and password), as well as the IP address or DNS name of the Phoenix Bell & Intercom system. This document also assumes the reader is able to navigate to the Admin area of Phoenix Bell & Intercom.

CONTENTS

GETTING STARTED

To be successful with backing up Phoenix Bell & Intercom, you will need at least one of the following:

- FTP location with credentials
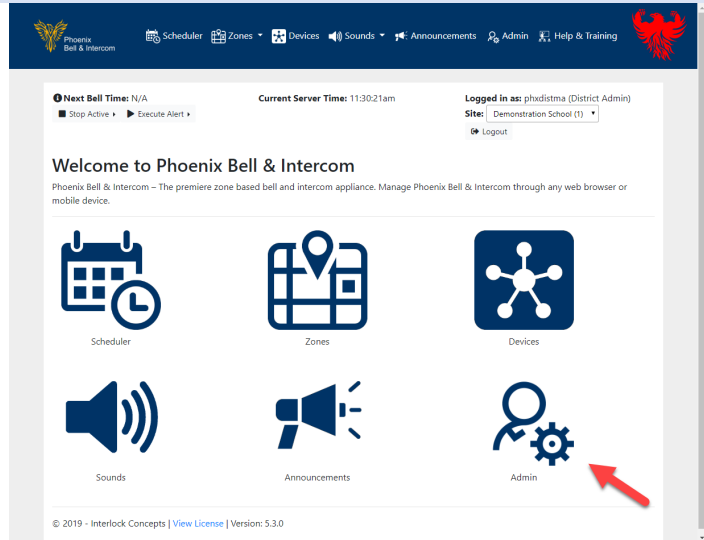- Network location with credentials
- Removable media (flashdrive)

    NOTE: All Phoenix Bell and Intercom systems come with FTP access to the PBI Backup cloud. You may choose to leave or remove this feature.
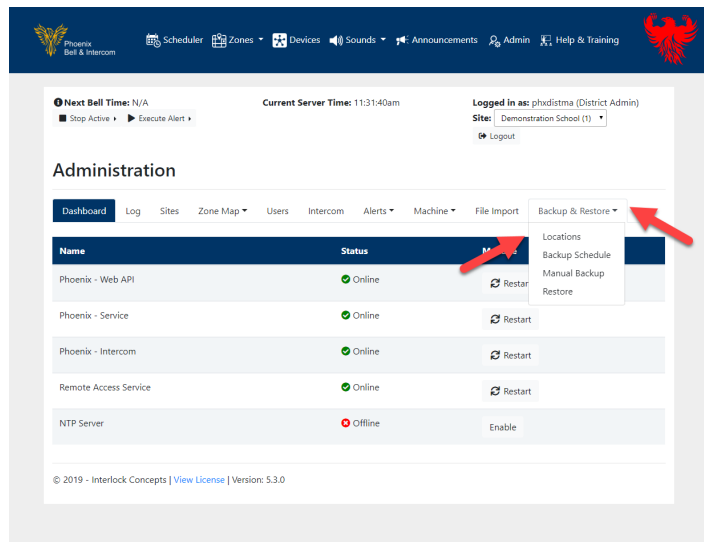
INSTRUCTIONS

CONFIGURING FTP LOCATION

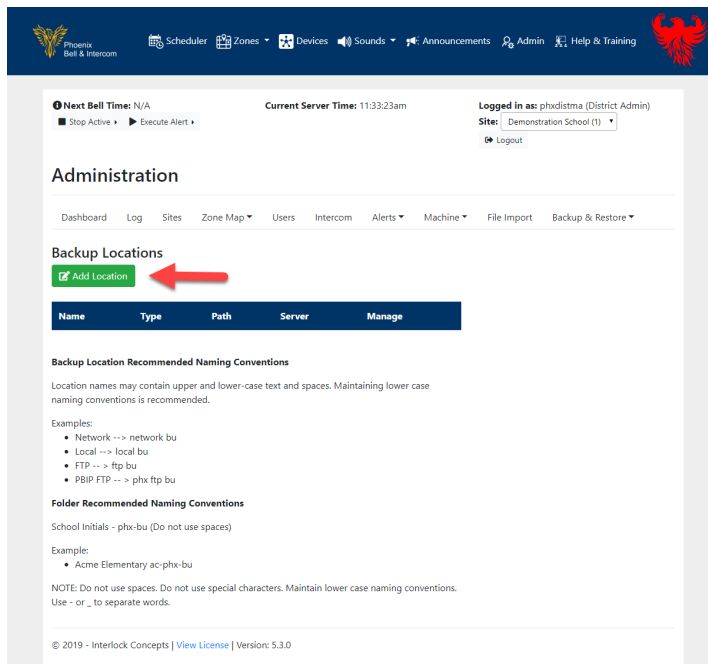1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.

3. Click **Backup & Restore**.

4. Click the **Add Location** button.

5. Type a friendly name in the **Name** field.
6. Click the drop arrow in the **Location Type** field and select **FTP**. (Do not be alarmed, the screen will change.)
7. Type the folder name where the backup file will be saved on the FTP site. Do not use any spaces or / in the **Folder Path** field.
8. Type the server IP or URL **Server, (IP or URL) field**.
9. Type the username with permission to the FTP site in the **Username** field.
10. Type the password associated with the username in the **Password** field.
11. Click the **Submit** button.
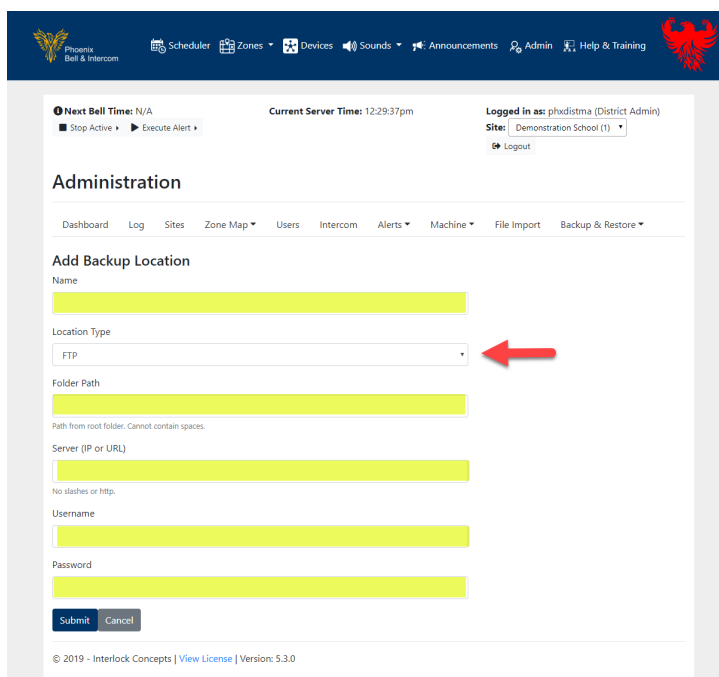
12. The image shown right is an example of a finished FTP location added to Phoenix Bell & Intercom.
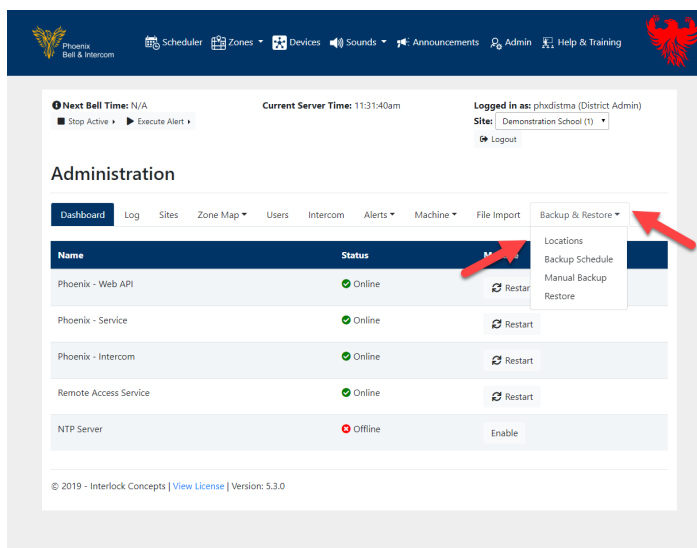
CONFIGURING NETWORK SHARE LOCATION

1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.

3. Click **Backup & Restore**.

4. Click the **Add Location** button.

5. Type a friendly name in the *Name* field.
6. Click the drop arrow in the *Location Type* field and select Network. (Do not be alarmed, the screen will change.).
7. In the *Folder Path* field, type the folder name where the backup file will be saved on the Network share. Do not use any spaces or / in the folder path field.
8. In the *Server (IP or URL)* field, type the server IP or URL Server, (IP or URL) field.
9. Type the username with permission to the Network share in the *Username* field.
10. Type the password associated with the username in the *Password* field.
11. Click the **Submit** button.

12. The image shown right is an example of a finished Network and FTP location added to Phoenix Bell & Intercom.
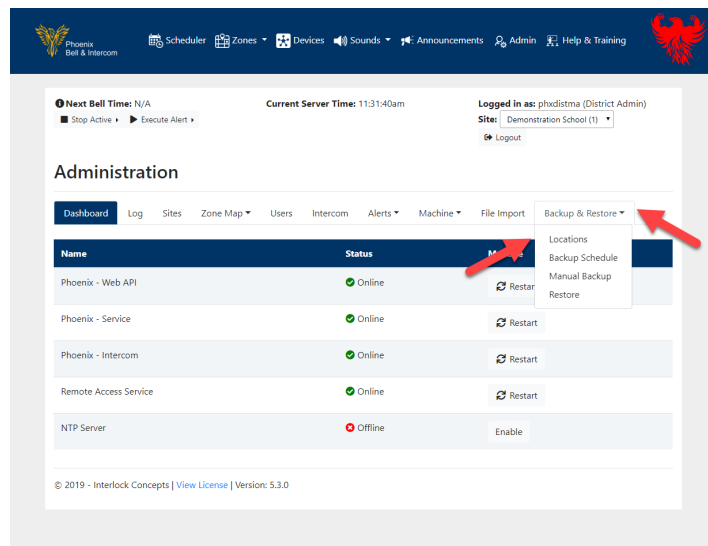
CONFIGURING LOCAL MEDIA REMOVABLE DRIVE LOCATION

1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.
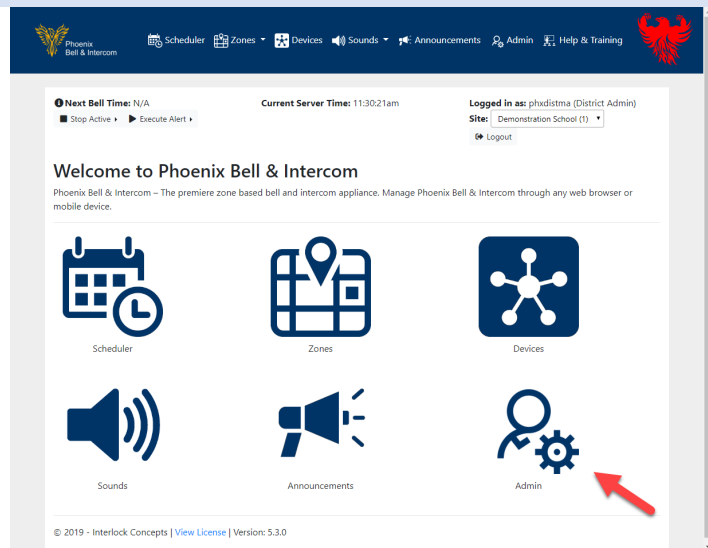
3. Click **Backup & Restore**.

4. Click the **Add Location** button.

5. Type a friendly name in the *Name* field.
6. Leave the drop arrow in the *Location Type* field set to Local.

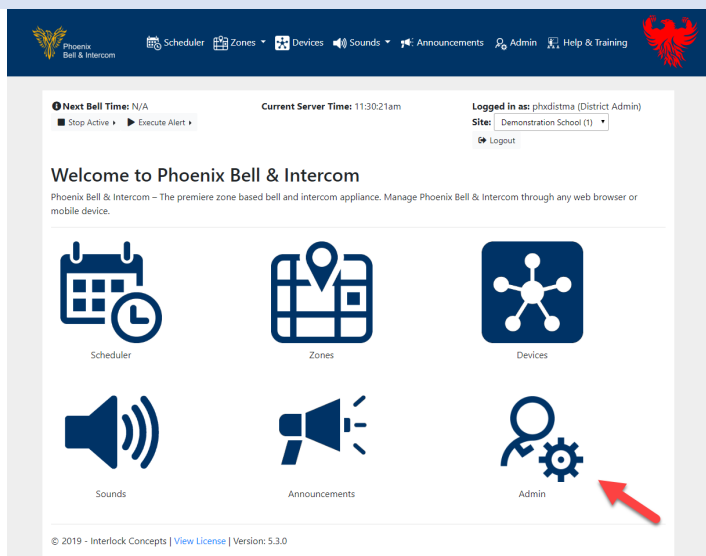7. Click the drop arrow in the ***Storage Device*** field, select the removable media drive.

8. Type the folder name where the backup file will be saved on the media drive. Do not use any spaces or / in the ***Folder Path*** field.
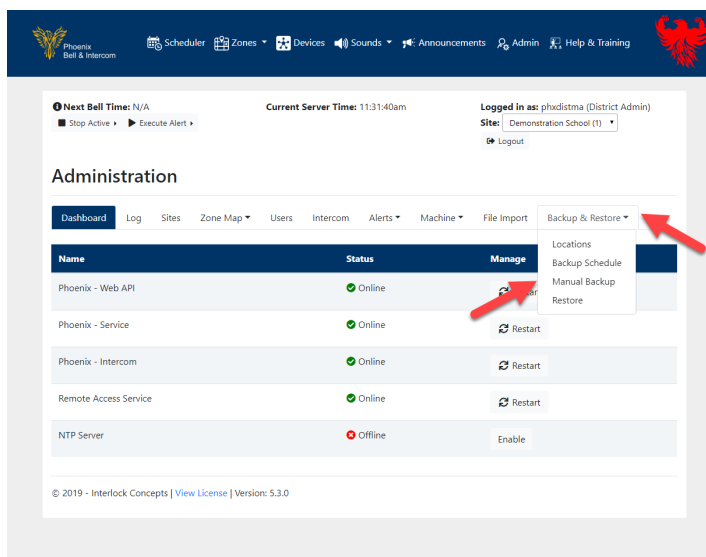9. Click the **Submit** button.

CREATING A MANUAL BACKUP

1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.

3. Click **Backup & Restore**.
4. Click **Manual Backup**.

5. In the *Name* field, type a friendly name for the backup file.

    Note: Recommended naming conventions for "Manual" backups are Date_Time using hyphens "-" between the digits.

    Example: 9-5-19-backup

6. In the *Location* field, click the drop arrow to select where the backup file will be saved
7. Click the **Backup** button. (not shown in the image).

    Note: The backup will run in the background and will take several minutes.

8. Once the backup has completed, an alert window will appear on the screen.
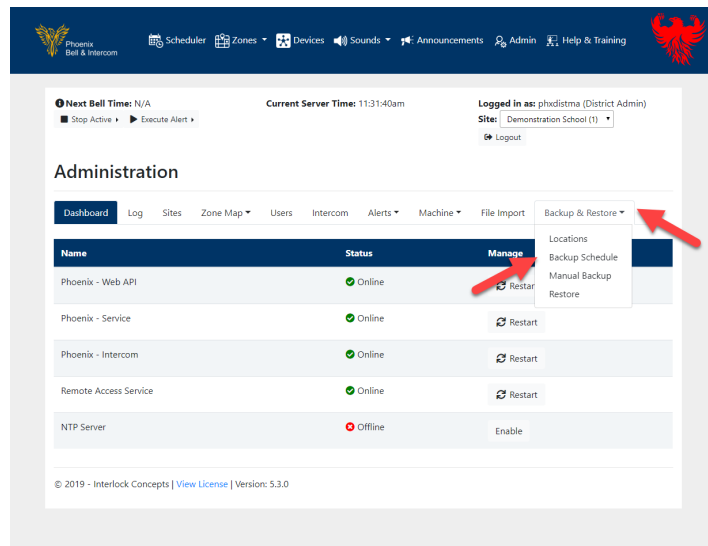
CREATING SCHEDULED BACKUP

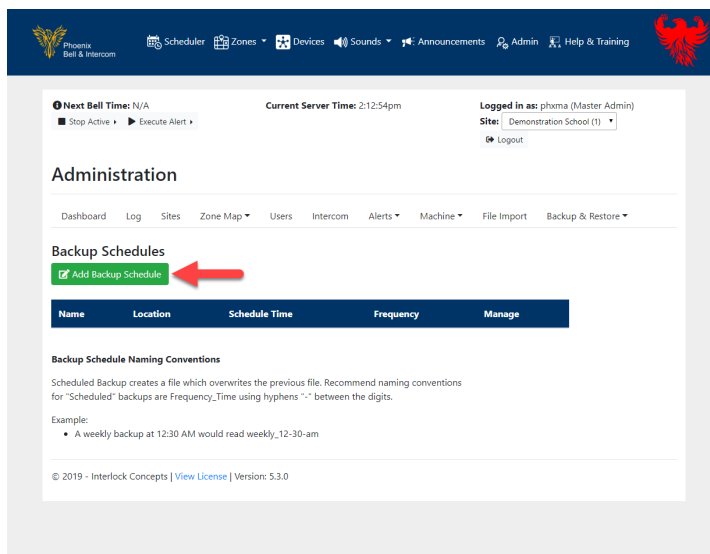1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.
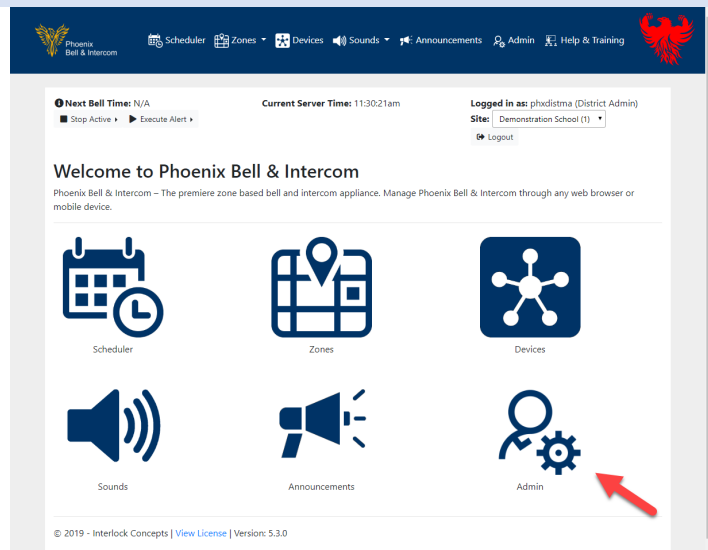
3. Click **Backup & Restore**.
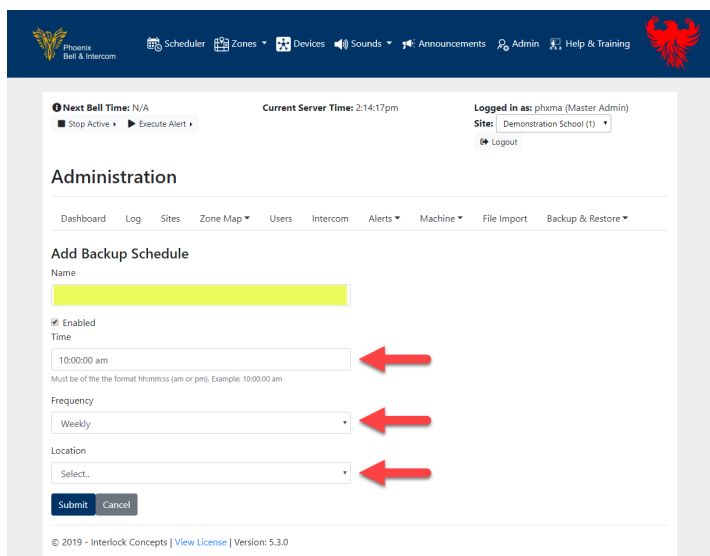4. Click **Backup Schedule**.

5. Click **Add Backup Schedule**.

6. In the *Name* field, type a name for the backup file.
7. In the *Time* field, set the time the backup should run.
8. In the *Frequency* drop down field, choose the frequency the backup should run.
9. In the *Location* field, set the location where the back up file will be saved.
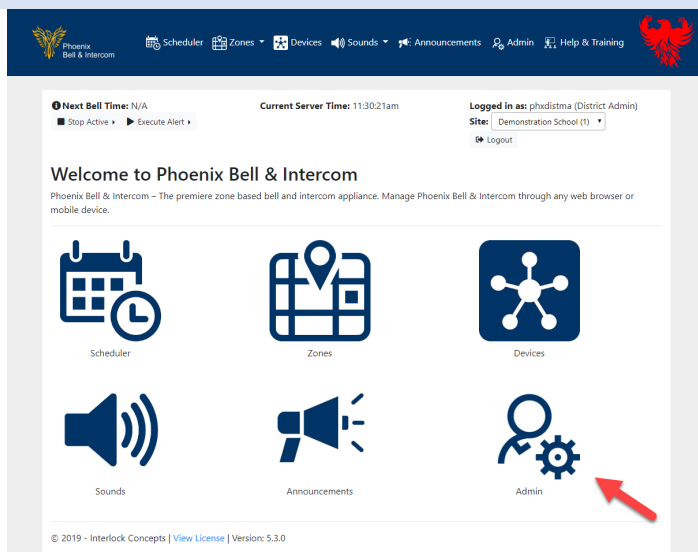10. Click the **Submit** button.

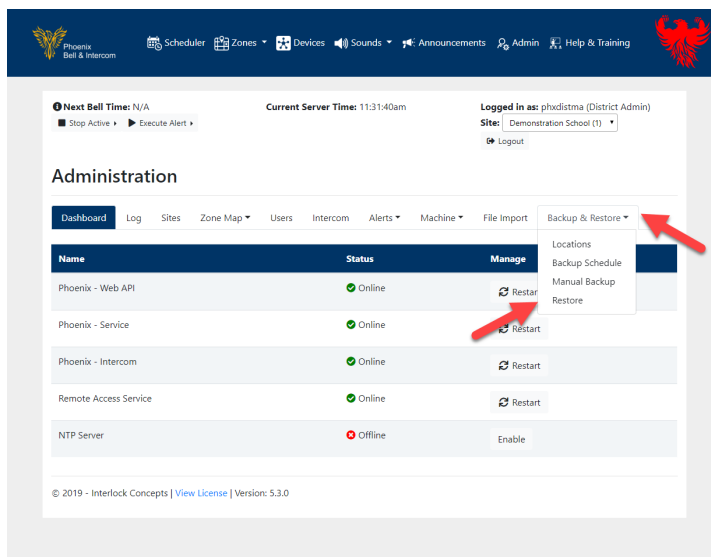11. The image shown right is an example of a finished Backup Schedule.
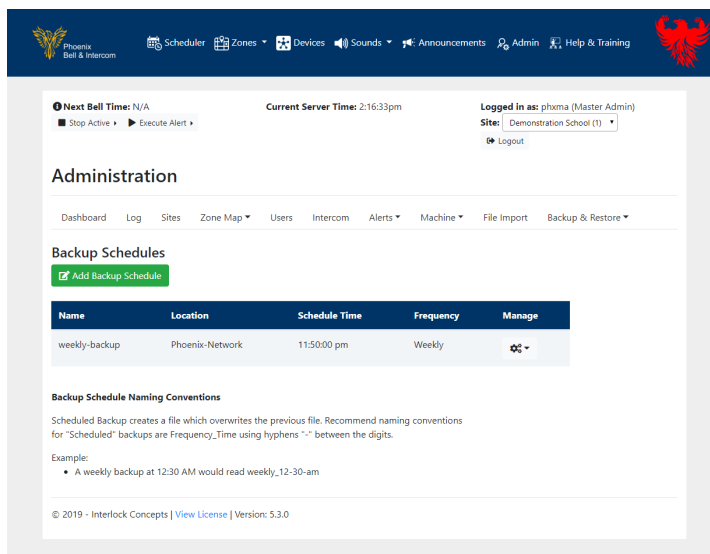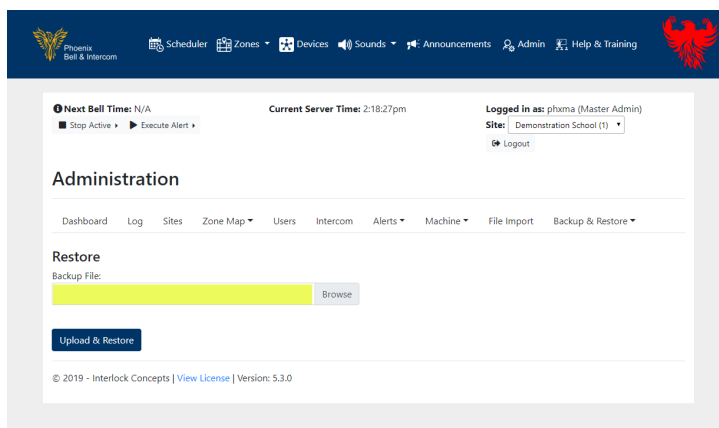
RESTORING A BACKUP

1. Log into the Phoenix Bell & Intercom.
2. Click the **Admin** icon.

3. Click **Backup & Restore**.
4. Click **Restore**.

5. Browse to the location of the backup file to be restored.

6. Click the **Upload & Restore** button.

   Note: If the backup file resides on an FTP site, it will be necessary to download the backup file to your local computer. If the backup file resides on a network share, it will be necessary to map to the share or copy the file to your local computer.

7. A progress bar will show the upload status. Once the restore is complete, an alert window will appear.