Creating Backup Files

You can create knowledgebase backups and set up a backup schedule using the Backup wizard in the admin console. The Backup wizard creates an export file of the KB that can be imported to restore the backup in an emergency. Creating backups is essential to safeguarding data against catastrophe or accidental deletion. You can also use the manual backup process to create an export file of the KB, subject to some prerequisites.

Agiloft uses XML to represent the data, then compresses the file with tar and gzip. All backups have a file extension of .xml.tar.gz, but to distinguish that it's an export file, the extension of .ew is used in place of .tar.

KBs with a status of Invalid or Disabled cannot be backed up.

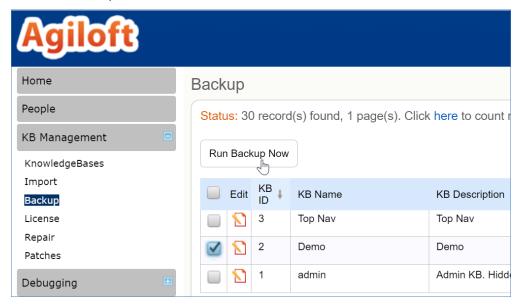


This article applies only to on-premise customers. Hosted customers do not need to configure backups.

Run a Manual Backup

You can run a manual, one-time backup from the admin console at any time. This can be useful when you're about to make a big change to a KB, such as performing an entity set sync.

- 1. In the admin console, go to **KB Management > Backup**.
- 2. Select the knowledgebases you want to back up.
- 3. Click Run Backup Now.



- 4. On the Data Source tab, select the destination for the backup files.
- 5. On the Data Format tab, select the Agiloft format.
- 6. On the Options tab, choose whether to disable the KB during the process. Disabling the KB prevents users from making changes to the content being exported, which is useful, but requires a certain window of time where no users need KB access. For large KBs, the process can take a long time, so plan accordingly.
- 7. Choose whether to strip file attachments. Removing file attachments can significantly reduce the size of the backup file.
- 8. Choose whether to strip history and communication data. Removing this data can significantly reduce the size of the backup file.
- 9. Click Finish.

Schedule Regular Backups

By default, the Agiloft system runs backups on all KBs once a day at 11 PM in the admin console time zone, also called server time. You can override the default so that the system only runs backups on KBs in which someone has logged in within the last 24 hours, using the Backup Active KBs Only global variable. This can prevent unnecessary backups on KBs that aren't actively used.

To set the backup schedule for a specific KB:

- 1. In the admin console, go to **Setup > Backup**.
- 2. Edit the KB you want to schedule for automatic backups.
- 3. Set the destination for the backup files. The default location is the server's home directory.
- 4. On the Frequency tab, configure how often you want automatic backups to run. The frequency may range from hourly to never. Since creating a backup of a large KB can be resource-intensive, plan KB backup frequencies accordingly.



The Maximum Concurrent Backups global variable determines the maximum number of simultaneously running backups allowed at any one time.

- 5. Select options for how often backups are overwritten. There are options for overwriting hourly, daily, weekly, monthly and yearly backups. The first backup at the beginning of each time period is considered by the system to be the anchor point for the system's schedule of overwriting backups. For example, the term "hourly backup" refers to the first backup of the hour. The term "monthly backup" refers to the first backup of the month.
- 6. Select whether backups are created on weekends. If weekends are excluded from the backup schedule, backups created on Friday are considered to be one day old on the following Monday. For large KBs, weekend backups can minimize the impact on productivity for users in the system.
- 7. Choose the backup behavior for attached files. The system default is to back up all attached files with every backup, but this can strain the system, especially in KBs with large quantities of files. Consider changing the default to weekly or even monthly if server load is a concern.
- 8. Select the backup start time. For example, if the start time is 12 AM with a frequency of 4 hours, the first backup occurs at midnight and the second backup occurs a 4 AM.

Complete these steps for each KB you want to back up automatically.



Regular backups are important to make sure new data is protected, and to make sure there is a backup file for the KB's current version of Agiloft.