



Quicken 2001 Family & Personal Finance

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Session 9*****

FILE MANAGEMENT AND BACKUP

Quicken uses many different file types to record data and offers two different methods to record data to new locations. During session 9, you will learn how to create a new folders (directory), subfolders, and how to import/export files to back up, organize and keep track of your Quicken files. You will also learn how to use Quicken's back up features.

Create a New Folder

A folder is the location on a drive where files are stored. Quicken uses a default location within the program for file storage.

Task: Create a new storage location on the hard drive to save your Quicken files.

1. Right Click on the [Start] button to display the pop up window.
2. Click [Explore]
3. Scroll up to the top of Windows Explorer and left click on [C:] to select the hard drive location.
4. Click [File] at the top of the screen and select [New>Folder]. A folder named *New Folder* will appear on the C: drive in the right hand column.
5. Right click [New Folder] and select [Rename]. Type in a the new name *Quickenfiles*. Press [Enter] to save the new name.
6. Click on *Quickenfiles* to highlight the folder.

7. Click [File] at the top of the screen and select [New>Folder]. A folder named New Folder will appear as a sub-folder in Quickenfiles.
8. Right click [New Folder] and select [Rename]. Type in the new name *Export*. Press [Enter] to save the new name.
9. Click on the [x] in the top right hand corner to close Windows Explorer.

Import/Export Files

Import and Export refers to moving parts of files or entire files from one application or location to another. These functions are used to incorporating online files to a home computer or creating a copy of Quicken files to be used on another computer. To use exported or .QIF files the files first need to imported.

Export to a File

Task: Learn how to export to a file

1. Use the DONNA account in Quicken.
2. On the main menu click [File] and select [Export>.QIF file]
3. A QIF export dialog box will be displayed.
4. Click [Browse]. A export to QIF file dialog box will be displayed.
5. In the “Save in” line, click – . Click [Main C:] drive. Locate the folder Quicken files. Double click the *Export* folder.
6. In the “File name” box type in DonnaDec01 and click [OK]
7. At the QIF Export dialog box, click on all check boxes expect “For Macintosh Users”. Click [OK]

The Donna file records have been exported and are now available to be used in another program or given to your accountant.

File Import

Downloaded or exported files can be incorporated into existing Quicken files or can be used to create new copies of existing files.

Task: Learn how to Import a file.

1. In the Quicken main menu line, click [File>Open>Marsha]
2. From the main menu bar, click [Import>QIF File]. A QIF import dialog

box appears.

3. Click [Browse]. An import from QIF file dialog box will be displayed.
4. In the “Save in” line, click – . Click [Main C:] drive. Click [Export] subfolder . Click [DonnaDec01] file to import.
5. In the box labeled “Quicken Account to Inport into:” click – . Click [Practice Import] and click [OK].

Hint: If you are running Quicken 2001. A dialog box will appear on the right side of the page stating none of the entries have been accepted.

6. Click [Accept All] on the right hand side of the screen. This moves the records into the open file.

You have just imported data.

Quicken File Types: Quicken uses five different file types to record records. When a file is copied from one locations to another, all five files are required for the program to read the data. The files can be copied by using the copy and paste procedure in the Edit menu on the main menu. Make sure all four files with the same name are copied. Each file will have file extensions of: QEL, QPH, QSD, QTX., ODF.

Backing up your Quicken File: Quicken saves your file on disk each time you enter a new transaction. However, if you ever lose data as a result of a hardware “crash” or computer virus, you may lose your valuable Quicken data as well. Just think of all the hours that would be “wasted” if this happens. ; Just ask Marsha about her crash on July 9, 1999, just as the lap top was going to be backed up.

*****Back up regularly, so you always have a copy of your Quicken data available.*****

There are two Options for Backing up your Quicken File. You can backup to a diskette or use online back up services.

Task: From the main menu line choose File>Backup. Quicken displays the Quicken Backup window. Choose the backup location you prefer: diskette or online. For today’s session backup the Extension Family Finance Training Checking Account file to a diskette.

***Diskette:** To back up to a removable diskette, select disk, enter the drive letter (if necessary) and then click OK. Quicken backs up the file, displays a message telling you that the backup was successful, and returns you to the Quicken [My Finances] Window. When file becomes too large for one disk, Quicken will prompt you to select and use multiple disks.

***Internet:** You must have your Quicken program registered to use online services. To backup to an Internet location, select Online, and then click OK. If you have already subscribed to the online backup service, follow the directions for backing up. As of July, 2001, the cost for Quicken backup services was \$19.95 per year.

Further information about connecting Quicken to the Internet is provided in Chapter 2 (pp. 7 - 10) of the Quicken Setup Guide for Quicken 2001.