

## Document a data backup policy

### Best Practice:

A backup policy helps manage users' expectations and provides specific guidance on the "who, what, when, and how" of the data backup and restore process. There are several benefits to documenting your data backup policy:

- Helps clarify the policies, procedures, and responsibilities
- Allows you to dictate:
  - where backups are located
  - who can access backups and how they can be contacted
  - how often data should be backed up
  - what kind of backups are performed and
  - what hardware and software are recommended for performing backups
- Identifies any other policies or procedures that may already exist (such as contingency plans) or which ones may supersede the policy
- Has a well-defined schedule for performing backups
- Identifies who is responsible for performing the backups and their contact information. This should include more than one person, in case the primary person responsible is unavailable
- Identifies who is responsible for checking the backups have been performed successfully, how and when they will perform this
- Ensures data can be completely restored
- Has training for those responsible for performing the backups and for the users who may need to access the backups
- Is partially, if not fully automated
- Ensures that more than one copy of the backup exists and that it is not located in same location as the originating data
- Ensures that a variety of media are used to backup data, as each media type has its own inherent reliability issues
- Ensures the structure of the data being backed up mirrors the originating data
- Notes whether or not the data will be archived

If this information is located in one place, it makes it easier for anyone needing the information to access it. In addition, if a backup policy is in place, anyone new to the project or office can be given the documentation which will help inform them and provide guidance.

### Description Rationale:

Collecting information about backing data up before it is needed helps prevent problems and delays that may be encountered when a user needs data from a backup.