



Click links for updates of this [user document](#) and [other resources](#).

Last revision: 4/23/2026

Passport CloudSave™ is a tool, cloud storage, and service built by Passport which allows you to back up your PBS SQL or PBS Vision systems and any other network directories you choose, and save it to a secure cloud environment. SQL backups will require your System Admin credentials, but you will not need to actively log into the Cloud, or remember the cloud credentials—those will all remain (encrypted) in the configuration and license files.

Installation

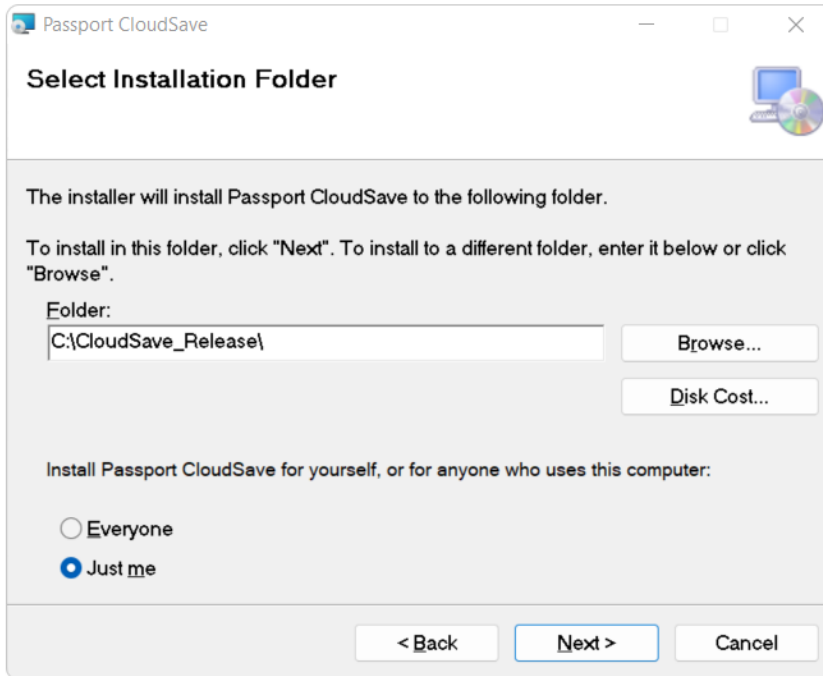
Passport CloudSave includes complimentary setup assistance (up to 1 hour) from Passport Support or your Partner.

Upon purchase, Passport will create your application license and cloud storage partition. Each of your administrators and installed computers must be registered, including email addresses (for expired license or storage exceeded notifications). If a user no longer needs access, a computer is retired, or a new computer requires access, Contact [Passport Support](#) so we can update your license to maintain access security.

If you are performing the install on your own, download the **PassportCloudSaveInstall.msi** and your **EIN_ClientName_cldconf.ini** configuration license from our secure [File Management Site](#) (login credentials required).

The ideal install location for Passport CloudSave is your PBS server, with other local directories you wish to back up. Mapped (non-local) drives may require revision of your operating system or registry settings. Passport can assist with registry updates to facilitate this mapped drive access. Have your IT person OK this. The SQL database(s) may be on non-local drives. You may install CloudSave and its license on any number of computers, allowing backups from multiple sources which will funnel into the same storage area, splitting the total storage allotment. If you would like to keep backups for different computers segregated, separate subscription accounts are required.

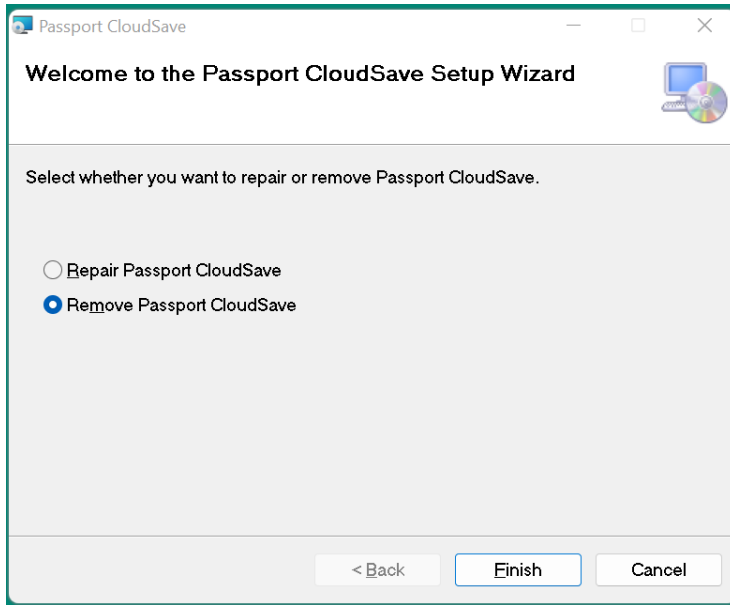
- Run **PassportCloudSaveInstall.msi**. Note—If this is a *native* Windows 11 PC (as opposed to one upgraded from Windows 10), you may need to temporarily [disable Windows Smart App Control](#) in *Windows Security app*>>*App & Browser Control*>>*Smart App Control settings*.
- You will be prompted for an install location. The default will be *C:\Program Files (x86)\Passport Software, Inc\Passport CloudSave* but you may designate a different location if you wish. For example, here we've created a folder on our C: drive called *CloudSave_Release*. You may choose any name.



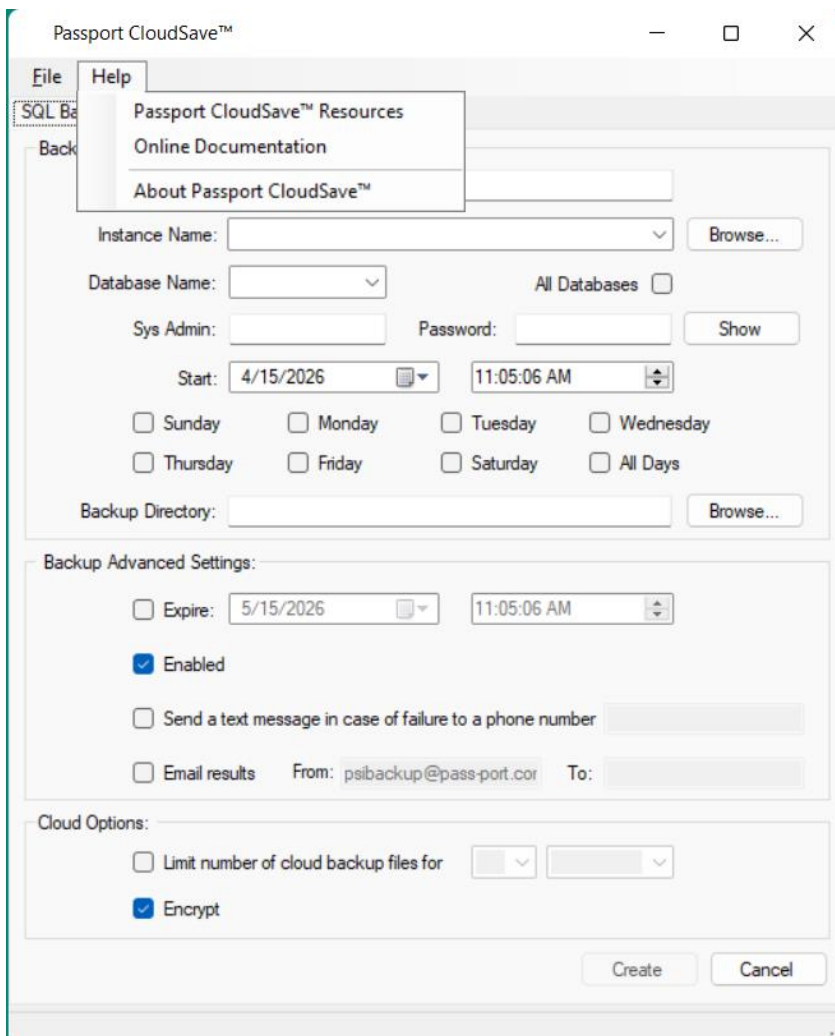
- Determine whether the install should be available to everyone who uses the computer, or just yourself. Follow the remaining prompts and allow the install to make changes. The application will be added to your Windows Start menu and the shortcut below will appear on your desktop:



- Copy your **EIN_Company Name.cldconf.ini** license to the install location.
- Remove the EIN/Company prefix, leaving only **cldconf.ini**
- You may launch the backup service from this shortcut, the Start menu, or the PCS.exe in the install folder.
- The Cloud location and credentials are stored in your license. You will not need to manually enter any of that information.
- If the software is already present, there will be two options when you run the **PassportCloudSaveInstall.msi**.
 - *Repair Passport CloudSave*
 - *Remove Passport CloudSave*—Removes all install files and the shortcut. This step is required when preparing to update to a newer version.



Getting Started—[Online Documentation](#) and [Passport CloudSave Resources](#) are found under **Help**:



Scheduling a SQL Backup

Passport CloudSave™

File Help

SQL Backup Top Level Files Backup SQL Restore

Backup Settings:

Job Name: 1208SQLBackup

Instance Name: HP-IAN\PBS1208

Database Name: HP-IAN\SQL1207

Sys Admin: [blurred]

Start: [blurred]

Sunday Thursday All Days

Backup Directory:

Backup Advanced Settings:

Expire: 5/ 3/2026 3:57:56 PM

Enabled

Send a text message in case of failure to a phone number

Email results From: psibackup@pass-port.cor To:

Cloud Options:

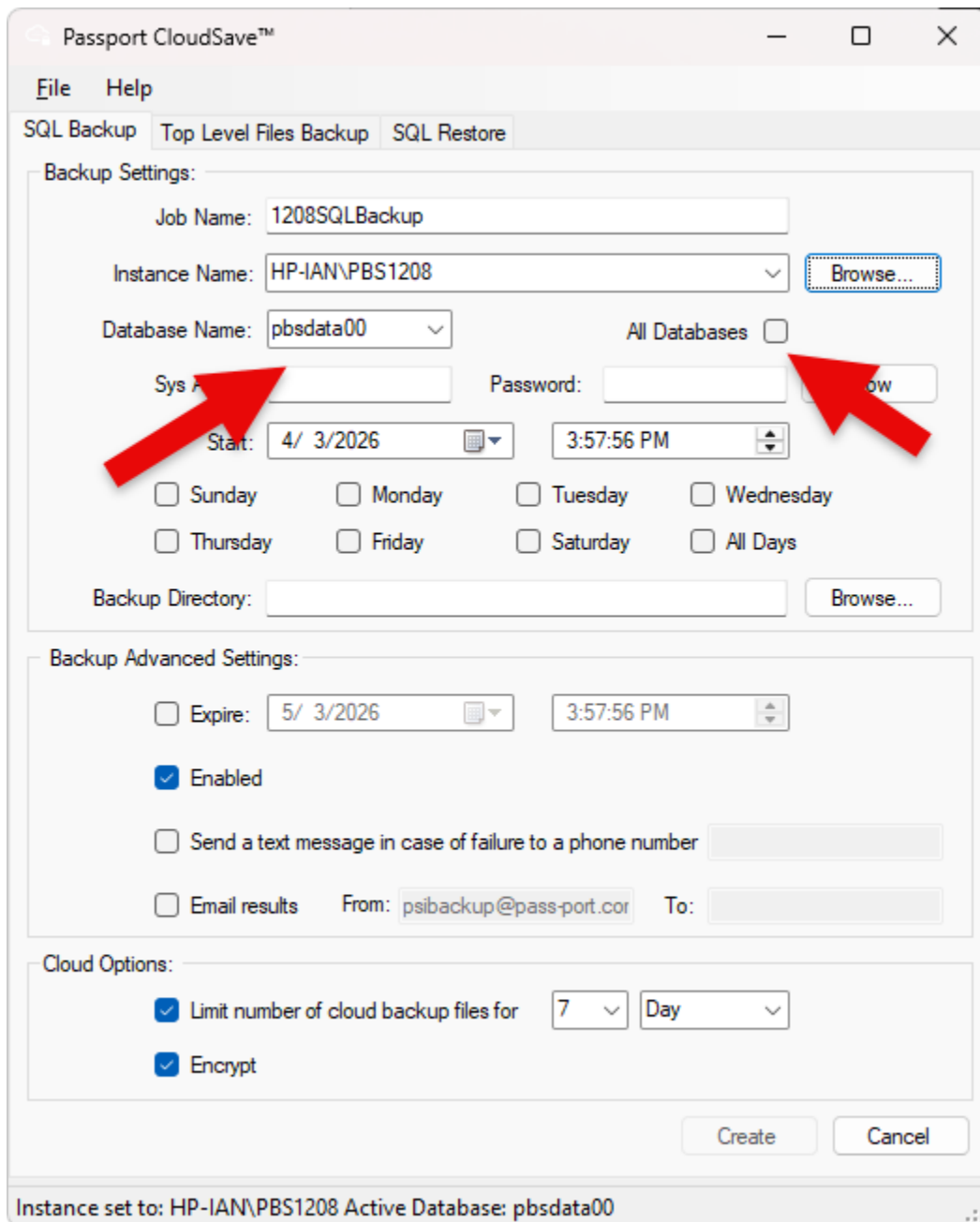
Limit number of cloud backup files for 7 Day

Encrypt

Instance set to: HP-IAN\PBS1208 Active Database: pbsdata00

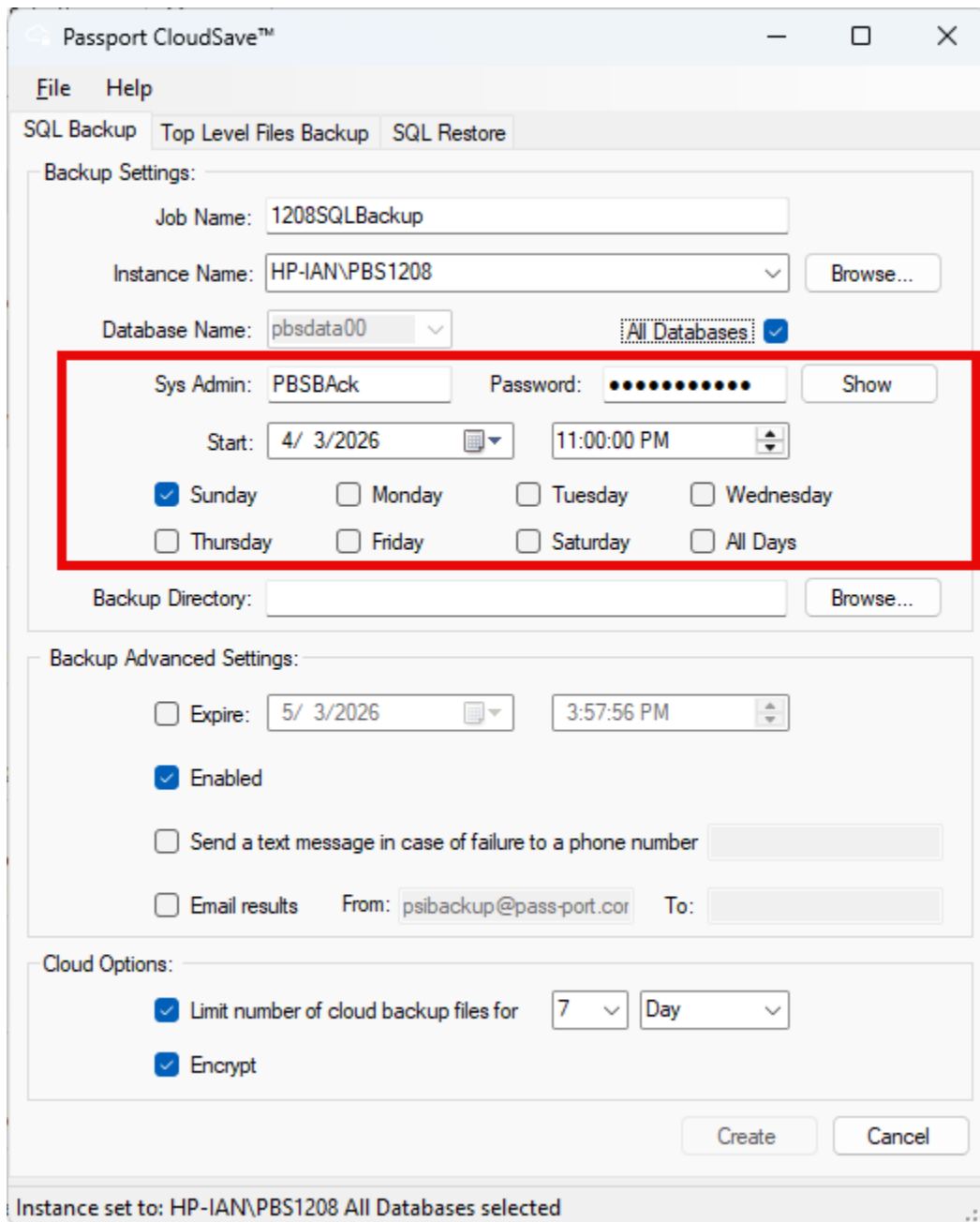
First, enter an easily identifiable *Job Name*. In the example below, we're backing up our SQL instance called PBS1208 so we've named the job *PBS1208SQLBack*.

For the *Instance Name*, you may type or locate it by clicking on the browse button.



You have an option to back up a single database. If you're running multiple companies and would prefer to keep each database backed up individually, you can set up separate jobs. In this example instance, we have multiple databases. You can also back up your **PBS eDocs** or even databases for third party applications.

To ensure a complete back up, select *All Databases*. This will back up everything in the SQL instance.

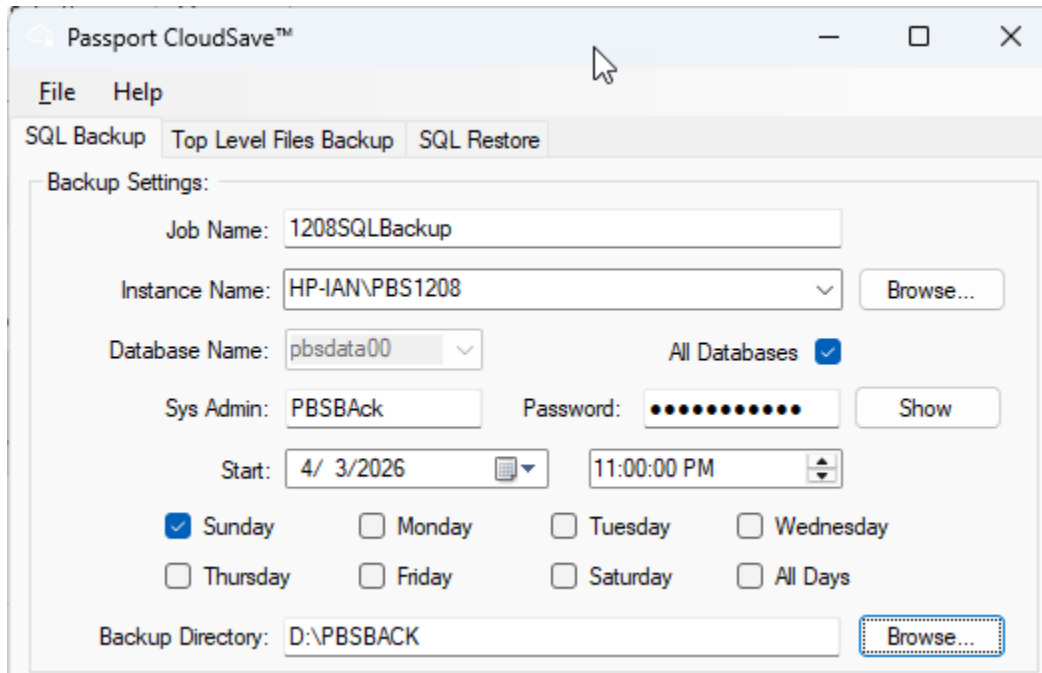


The next step is to provide credentials for the tool. **This must be a SQL login, not a Windows login.** You may use your SA password or you may set up a new SQL user with its own password in SQL Server Management Studio to do this. Using the latter for this example, we created a new user called *PBSBack*, assigned a password, and gave the user DBO (owner) credentials for all databases in the instance, ensuring it will have full permissions to back up everything in the SQL instance.

The next entry fields are the start date for the job (the default is today's date) and the time you'd like this job to begin each time it runs. We've accepted today's date and have changed the backup time to occur at 11:00 PM to ensure low or no traffic against the database. You may specify any weekday or combination of such:

If you are running PBS SQL, we recommend nightly backups of your SQL database to ensure you always have a current recovery copy available in the event of a system failure. You will be prompted to select a work location. **Please select a work directory with enough storage to process your backup.**

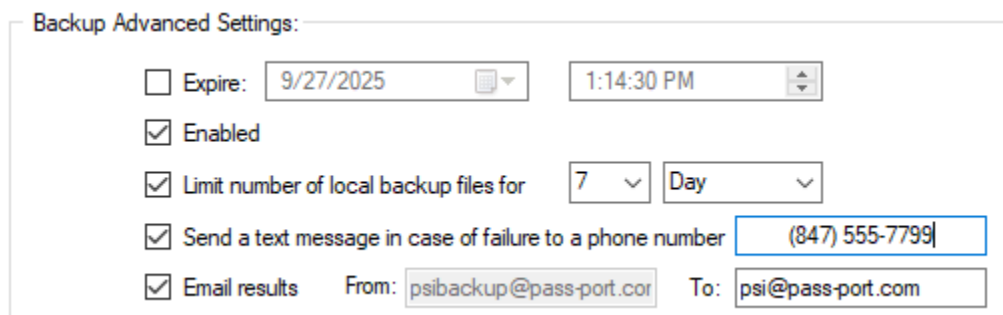
Note: The Top-Level Directory is usually named .../pbs and is where the programs and temporary work files reside. These files can be recreated relatively easily, so they should be backed up periodically, but not necessarily every night. **If you are *not* using MS SQL, then your Top-Level Directory also contains all of your data and should be backed up every night.**



The screenshot shows the 'Passport CloudSave™' application window with the 'SQL Backup' tab selected. The 'Backup Settings' section includes the following fields and options:

- Job Name: 1208SQLBackup
- Instance Name: HP-IAN\PBS1208 (with a 'Browse...' button)
- Database Name: pbsdata00 (with a dropdown arrow) and 'All Databases' checked
- Sys Admin: PBSBAck and Password: [masked] (with a 'Show' button)
- Start: 4/ 3/2026 (with a calendar icon) and 11:00:00 PM (with a time selector)
- Frequency: Sunday (checked), Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and All Days (all unchecked)
- Backup Directory: D:\PBSBACK (with a 'Browse...' button)

In most cases, you will want to make nightly backups of PBS, but under the *Backup Advanced Settings*, you may set an expiration. If the job expires, it will no longer run automatically.



The screenshot shows the 'Backup Advanced Settings' section with the following options:

- Expire: 9/27/2025 (with a calendar icon) and 1:14:30 PM (with a time selector)
- Enabled
- Limit number of local backup files for 7 (with a dropdown arrow) Day (with a dropdown arrow)
- Send a text message in case of failure to a phone number (847) 555-7799 (with a text input field)
- Email results From: psibackup@pass-port.cor To: psi@pass-port.com (with text input fields)

The above settings are a good example for scheduling your backups. You may limit the number of retained backups, and you can have **Passport CloudSave** send a text to a cell phone number in the event of a failure, and even set it to email you the results each time it runs.

Note: you may schedule two or more jobs to run concurrently. They will be processed in separate work directories and produce separate logs.

Next are the Cloud Options:

The screenshot shows the Passport CloudSave™ configuration window. The 'Backup Settings' section includes fields for Job Name (1208SQLBackup), Instance Name (HP-IAN\PBS1208), Database Name (pbsdata00), Sys Admin (PBSBBack), Password, Start date (4/ 3/2026) and time (11:00:00 PM), and Backup Directory (D:\PBSBACK). The 'Backup Advanced Settings' section includes an 'Expire' date (5/ 3/2026) and time (3:57:56 PM), an 'Enabled' checkbox, a 'Send a text message in case of failure to a phone number' checkbox with the number (847) 555-7799, and an 'Email results' checkbox with 'From: psibackup@pass-port.cor' and 'To: psi@pass-port.com'. The 'Cloud Options' section, highlighted with a red box, includes a 'Limit number of cloud backup files for' checkbox with a value of 27 and a unit of 'Day', and an 'Encrypt' checkbox. The 'Create' and 'Cancel' buttons are at the bottom right. A status bar at the bottom indicates 'Backup Directory set to: D:\PBSBACK'.

Sending backup copies to the cloud protects against catastrophic loss of your server and local backups, or malware/ransomware. Passport’s team of experts can assist you with cloud recovery.

When scheduling backups, you can also limit their number. In the above example, backups will be retained for 27 days in the cloud. This manages your storage demands while still providing the level of protection you need.

Lastly, the CloudSave service has the option (defaulted) to encrypt the backup file. Encryption does take longer, but helps prevent unauthorized access of this data in the event of a server breach.

Review your settings carefully before clicking create.

This will create a job in the *MS Windows Task Scheduler* that will execute the backup to run on each selected day and time.

What if you made a mistake on setting up your job?

Whether you set an incorrect time, forgot to have it email your results, or wish to make any other changes, simply go into *Task Scheduler* (search your Windows applications), *Display All Running Tasks*, and remove the job you created. Then run **Passport CloudSave** again and set up a new one. It's that quick and easy.

What about different schedules?

You may also set up multiple backup schedules with their own rules. For example:

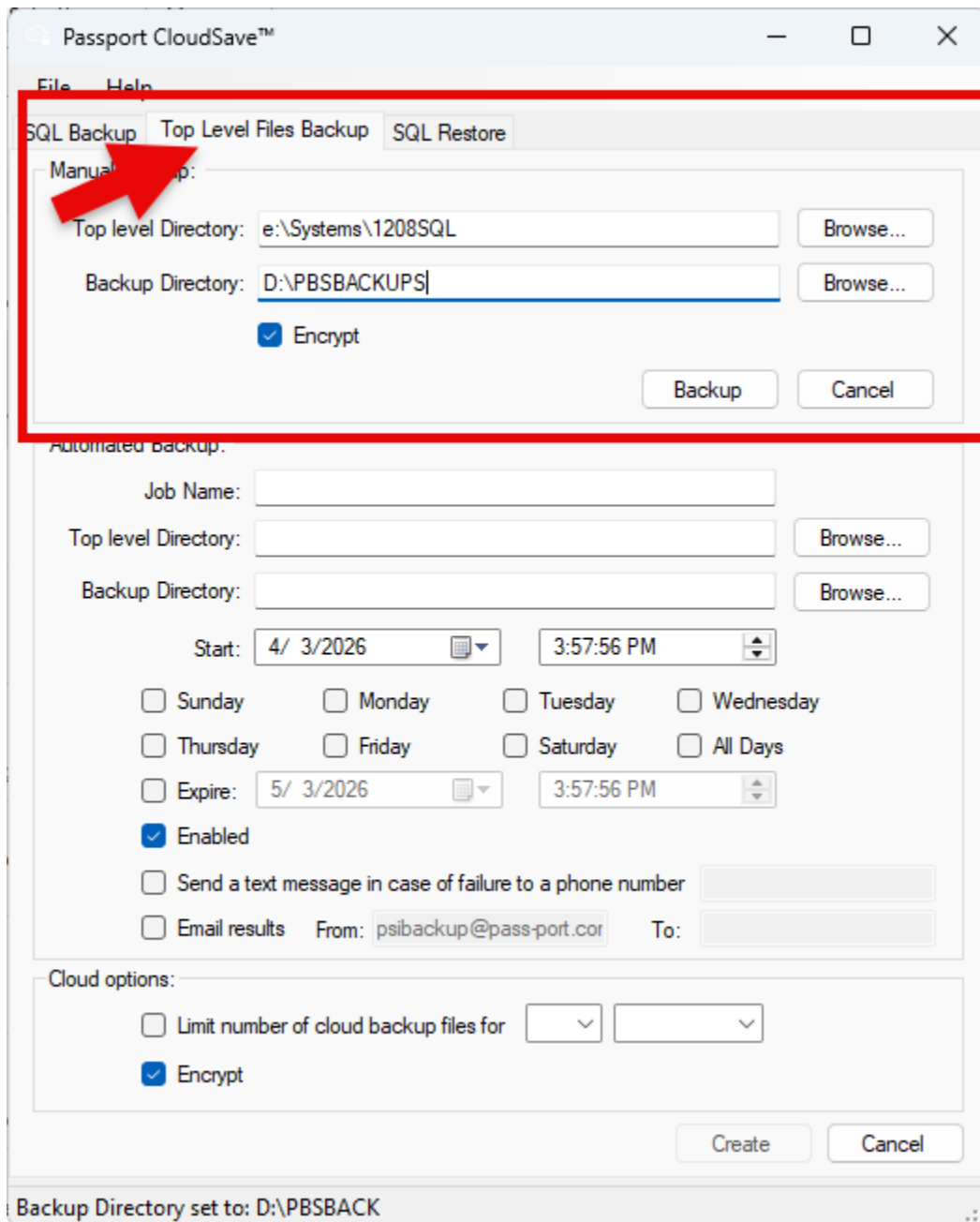
- Job 1—Backup database Mondays through Thursdays, keeping Cloud backups for 14 days.
- Job 2—Backup database each Friday, keeping Cloud backups for 3 months.
- Job 3—Back up the PBS Top-Level each Friday, keeping Cloud backups for 1 month.

When you click *create*, you will be asked for the password for the logged in *Windows* user.

NOTE: If running PBS SQL and you wish to back up your PBS install folder as well (the actual PBS software), you must create that job separately. Be sure you click on the create button for your SQL backup job BEFORE you move to set up your TLD backup.

[Performing a One-Time Top-Level Folder Backup](#)

If you would like to make an “on demand” backup for any reason (such as before an update), you can do so by opening the **Passport CloudSave**, clicking on the *Top-Level Files Backup* tab and set up the *Manual Backup* at the top of the screen:



Enter or select the *Top Level* Directory—the folder you wish to back up. Enter or select the *Backup Directory*—the temporary work area. This may just be a folder where you’ve installed the utility, but you may wish to put this work area on a different drive if storage space is a concern. Encryption will be selected by default, but you may uncheck it. Now click the Backup button and it will begin immediately.

If you’re running PBS SQL, it is important to make a periodic backup of your Top-Level folder as well. While the programs can be easily replicated, your Top-Level of PBS contains any reports you’ve printed to disk (RWPRT folder), PDF files (PDFFIL), PBS User credentials, pathfiles, programs (including Custom), as well as the mapped structure if you have more than one company installed.

Scheduling a “Top-Level” Folder Backup

This is also how a Vision user (non-SQL) would be able to back up their entire PBS installation, as all data for all companies is stored under the Top-Level Directory.

NOTE: Technically, this option could be used to back up any folder on your drive, allowing you to back up virtually anything to the cloud.

Once again, we’ll select *Top-Level Files Backup*, but now we’ll be working in the lower 2/3 of the screen.

Passport CloudSave™

File Help

SQL Backup Top Level Files Backup SQL Restore

Manual Backup

Top Level Directory: Browse...

Backup Directory: Browse...

Encrypt

Backup Cancel

Automated Backup:

Job Name:

Top level Directory: Browse...

Backup Directory: Browse...

Start:

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday All Days

Expire:

Enabled

Send a text message in case of failure to a phone number

Email results From: To:

Cloud options:

Limit number of cloud backup files for

Encrypt

Create Cancel

Backup Directory set to: D:\PBSBackup

First, give your job a descriptive name. It cannot have the same name as any other job. Enter or select the *Top Level* Directory—the folder you wish to back up. Enter or select the *Backup Directory*—the

temporary work area. This may just be a folder where you've installed the utility, but you may wish to put this work area on a different drive if storage space is a concern.

Next, set the initial date and time you'd like to start this job. In this case, we changed the hour to 11 PM. The program will reset it to 24H military time automatically.

Select the day(s) of the week you'd like for this job to run.

You may check the *Expire* box and select the date and time when you will no longer want to create new backups (typically not recommended).

The *Enabled* button will be checked by default. It is unlikely you would want to disable this function in the very screen you are entering it, but it is a Windows standard.

Check the box and enter a phone number to enable *Send a text message in case of failure* so you or your administrator will receive a text from **Passport CloudSave** in the event of failure. This is recommended, but not required.

Set the *Email results* for notifications, whether the backup is successful or fails.

Under *Cloud options*, choose the retention length for cloud backups (number of days/weeks/months/years). For this example, we've selected 27 days.

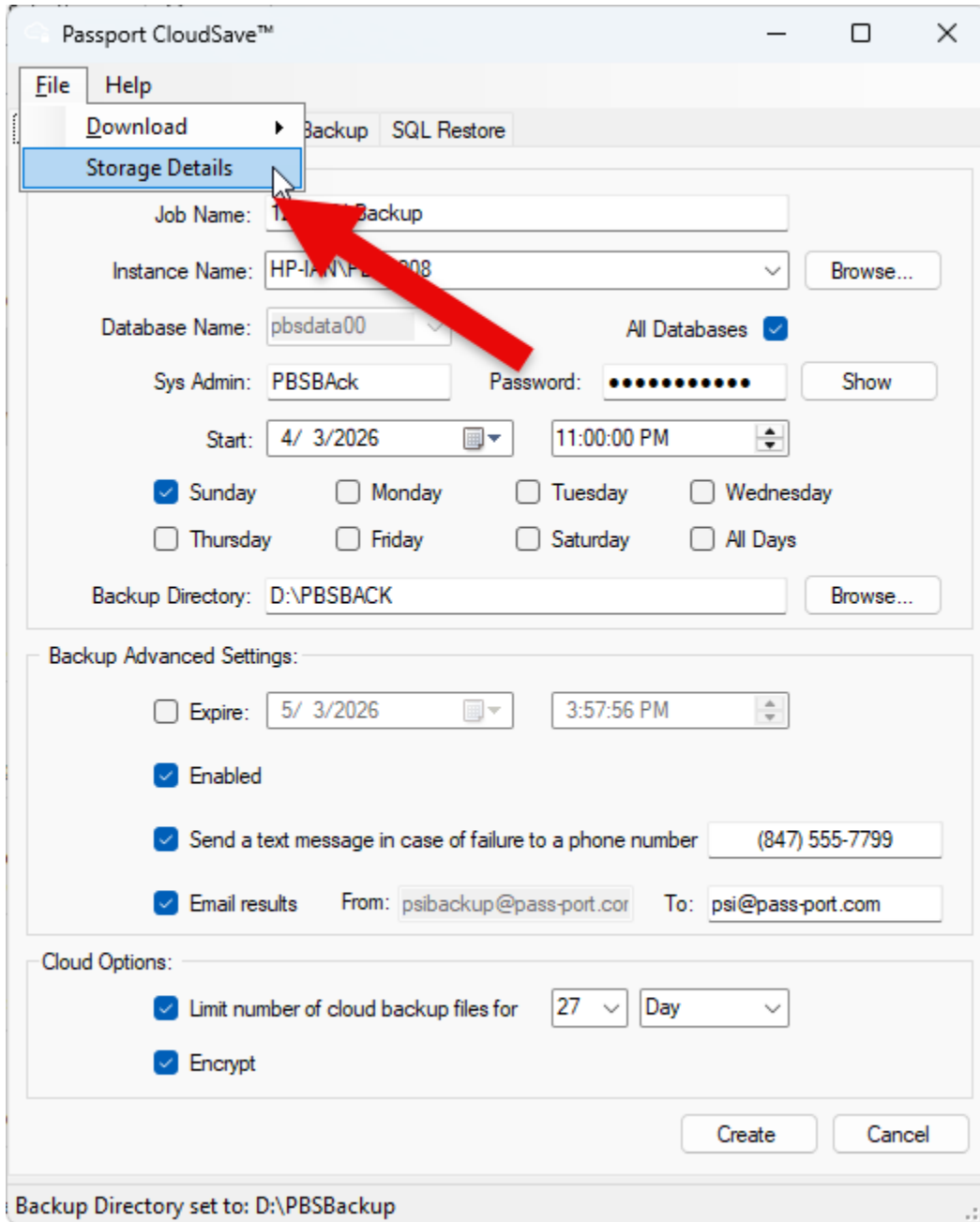
Lastly, you can choose to encrypt your backup file, which is checked by default and highly recommended.

Carefully review your information before you click Create and ensure everything is correct. Once you have done this, click Create and a new job will be scheduled to run under the *Windows Task Scheduler*.

You may create additional jobs to back up additional folders. Consider the storage space you have available in your **Passport CloudSave** cloud account. It may take time to determine the best options for you, either in the number of backups you prefer to store, or the total storage of your account.

Each job will be appended with the folder name being backed up, making it easier to find your backups in the future. If it's a SQL backup, and you're backing up all databases, it will start with SQLDBs. If you create individual jobs to back up individual databases within the instance, it will show you the database name; pbsdata00, pbsdata01...

Storage Details



The screenshot shows the Passport CloudSave™ application window. The 'File' menu is open, and 'Storage Details' is highlighted. A red arrow points to this menu item. The main window displays the following settings:

- Job Name: 12345 Backup
- Instance Name: HP-IAWPE008 (with a 'Browse...' button)
- Database Name: pbsdata00 (with a dropdown arrow and 'All Databases' checked)
- Sys Admin: PBSBACK Password: [masked] (with a 'Show' button)
- Start: 4/ 3/2026 11:00:00 PM
- Frequency: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, All Days
- Backup Directory: D:\PBSBACK (with a 'Browse...' button)

Backup Advanced Settings:

- Expire: 5/ 3/2026 3:57:56 PM
- Enabled
- Send a text message in case of failure to a phone number (847) 555-7799
- Email results From: psibackup@pass-port.cor To: psi@pass-port.com

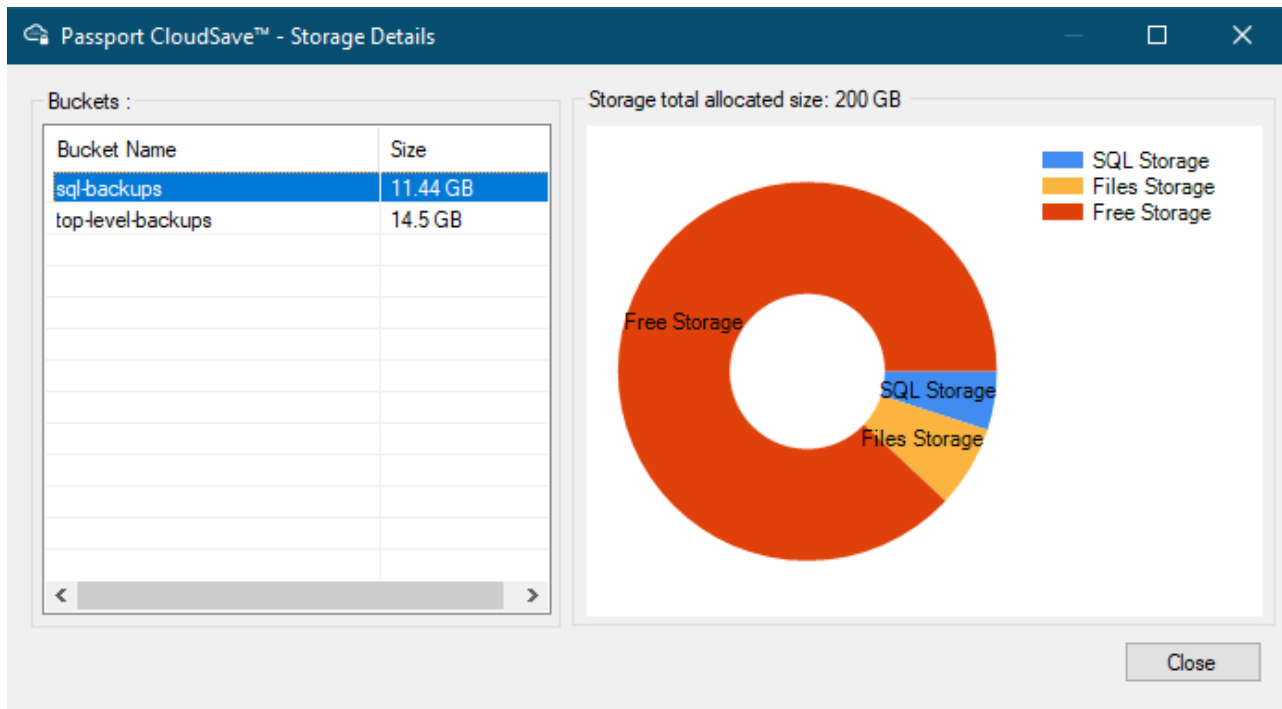
Cloud Options:

- Limit number of cloud backup files for 27 Day
- Encrypt

Buttons: Create, Cancel

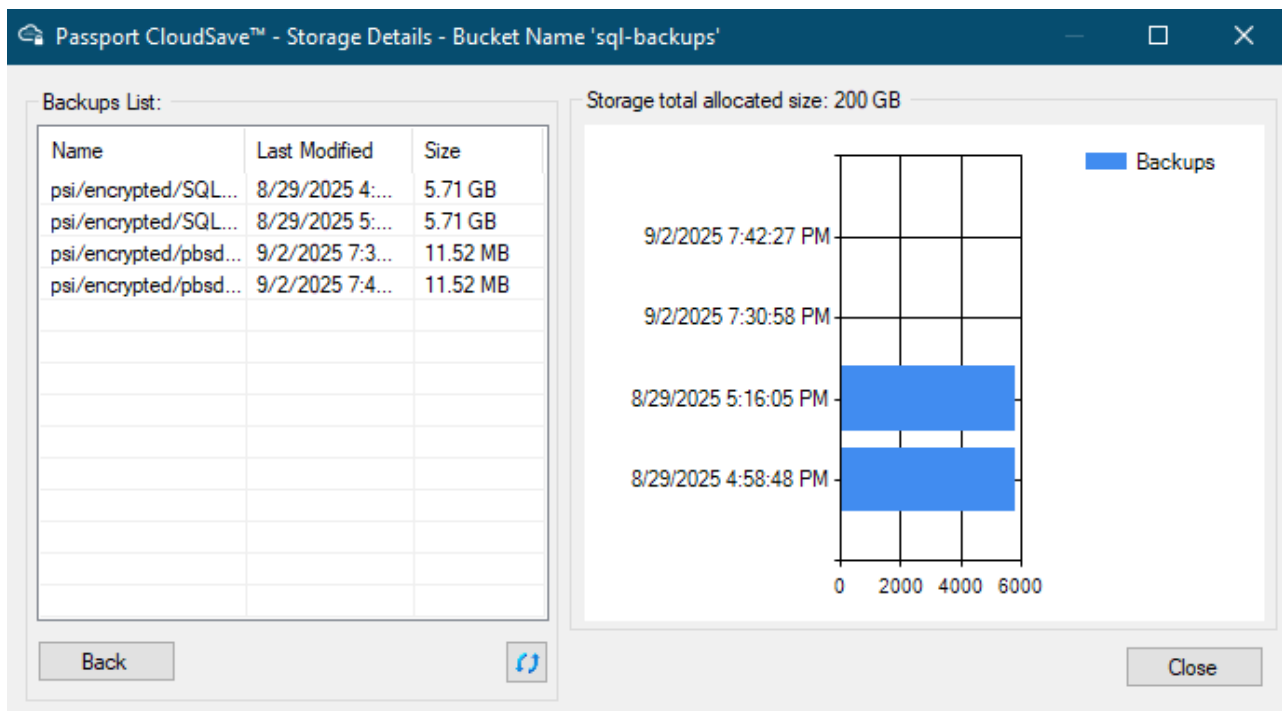
Status bar: Backup Directory set to: D:\PBSBackup

Reviewing your information is as simple as opening **Passport CloudSave**, selecting *File*, and *Storage Details*.



A new Window will appear, showing the total space allotted within your account, how much data is being stored in your SQL folder, how much is being stored in your file folder, and how much remains in free storage. This image shows we have about 90% of our 200 GB of space available. This will change over time as we create additional backups and store them in the cloud.

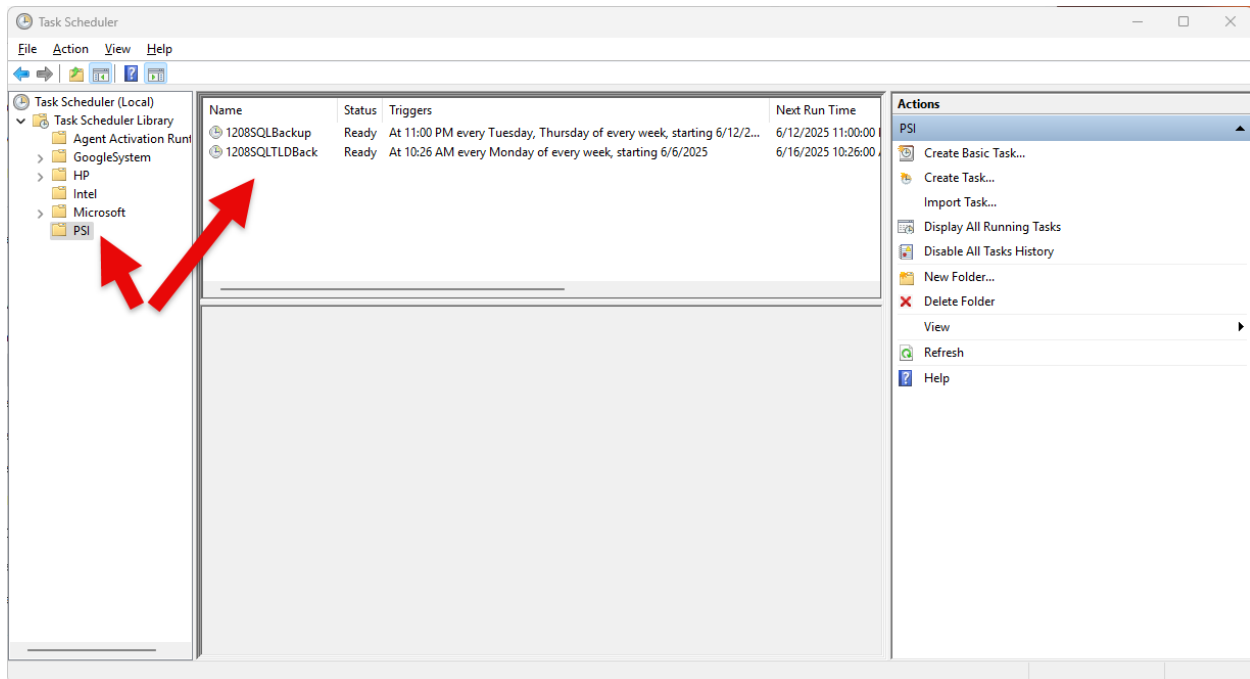
Double click a folder (*top-level-backups* in this example) to get a list of stored backups in the cloud.



This will allow you to manage your storage space and ensure you have plenty to achieve your backup goals.

Removing Jobs from Task Scheduler

If you've made a mistake in your saved task, you may edit basic date and time related tasks details of the job in the *Windows Task Scheduler*. If the error is in the phone number, email address, or similar information, you will need to remove the job and run **Passport CloudSave** to create a new one. Open *Windows Task Scheduler*, click on the *Task Scheduler Library*, then *PSI*:

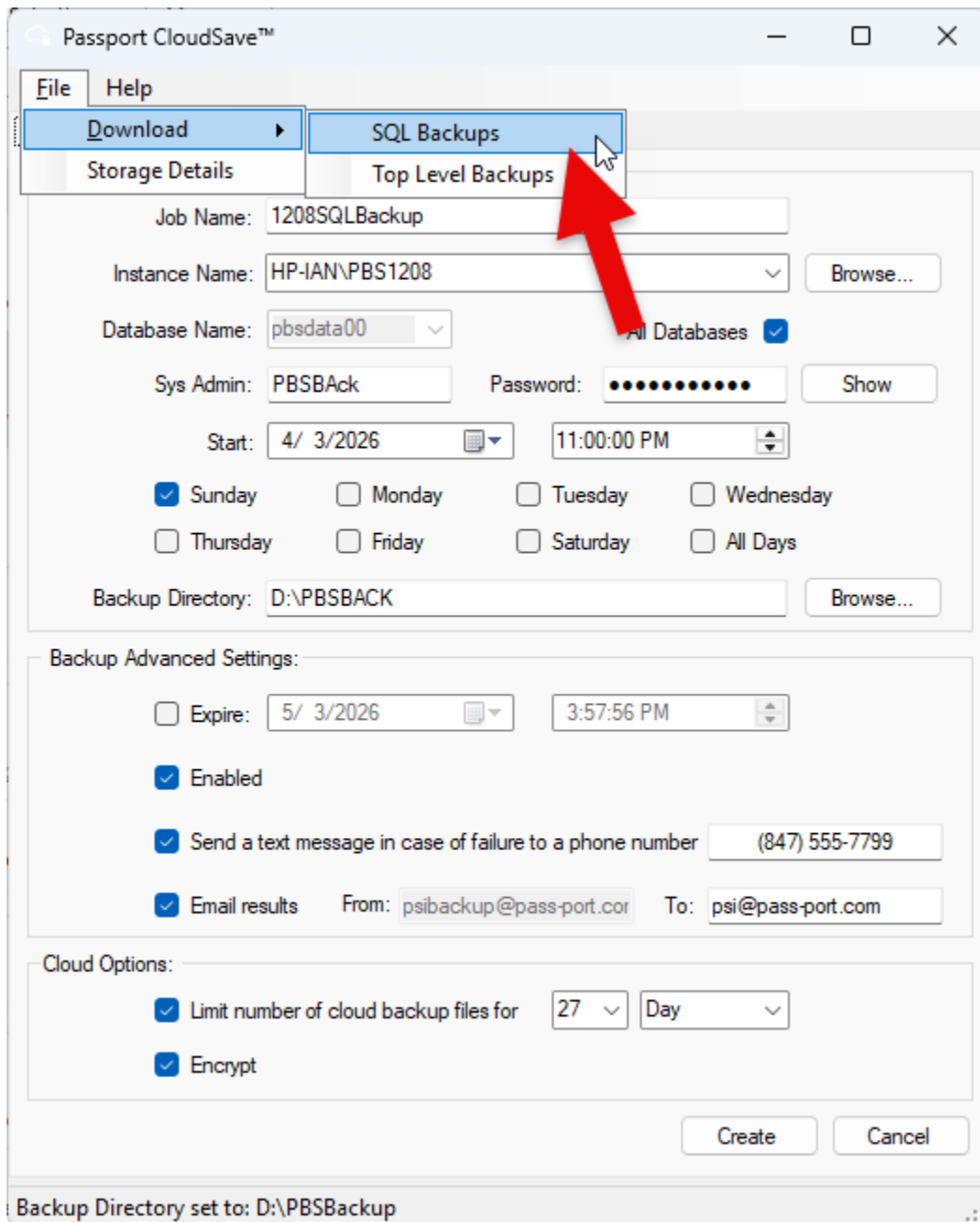


The *PSI* folder contains all jobs created using the **Passport CloudSave**. Double click on a job to open and edit. For details not stored in Task Scheduler, highlight the errant job, right click, and delete. It will remove the job, at which point you can create a new one in **Passport CloudSave**.

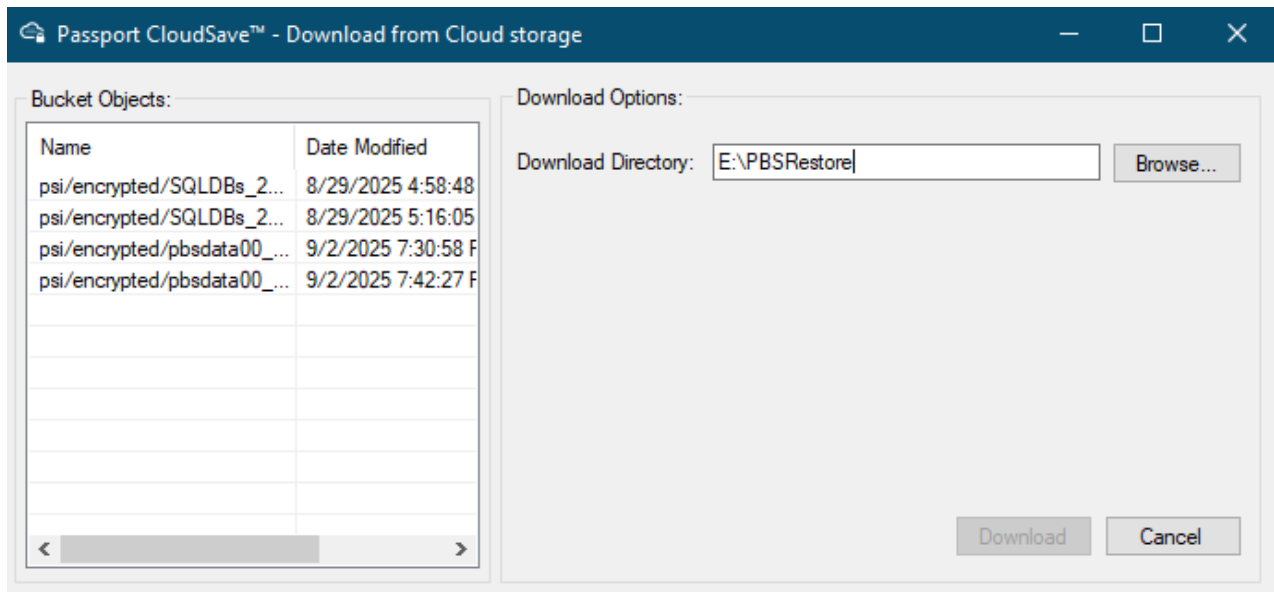
Restoring a Backup

Restore your Top-Level directory *and* your SQL database(s) are separate processes.

To download your backups, simply click on *File*, then *Download*:

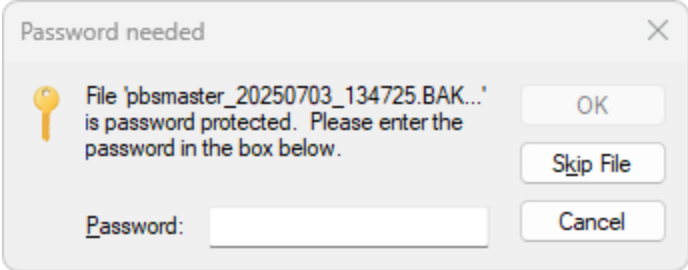


Select the backup from *Bucket Objects*, choose a *Download Directory*, and click *Download*:



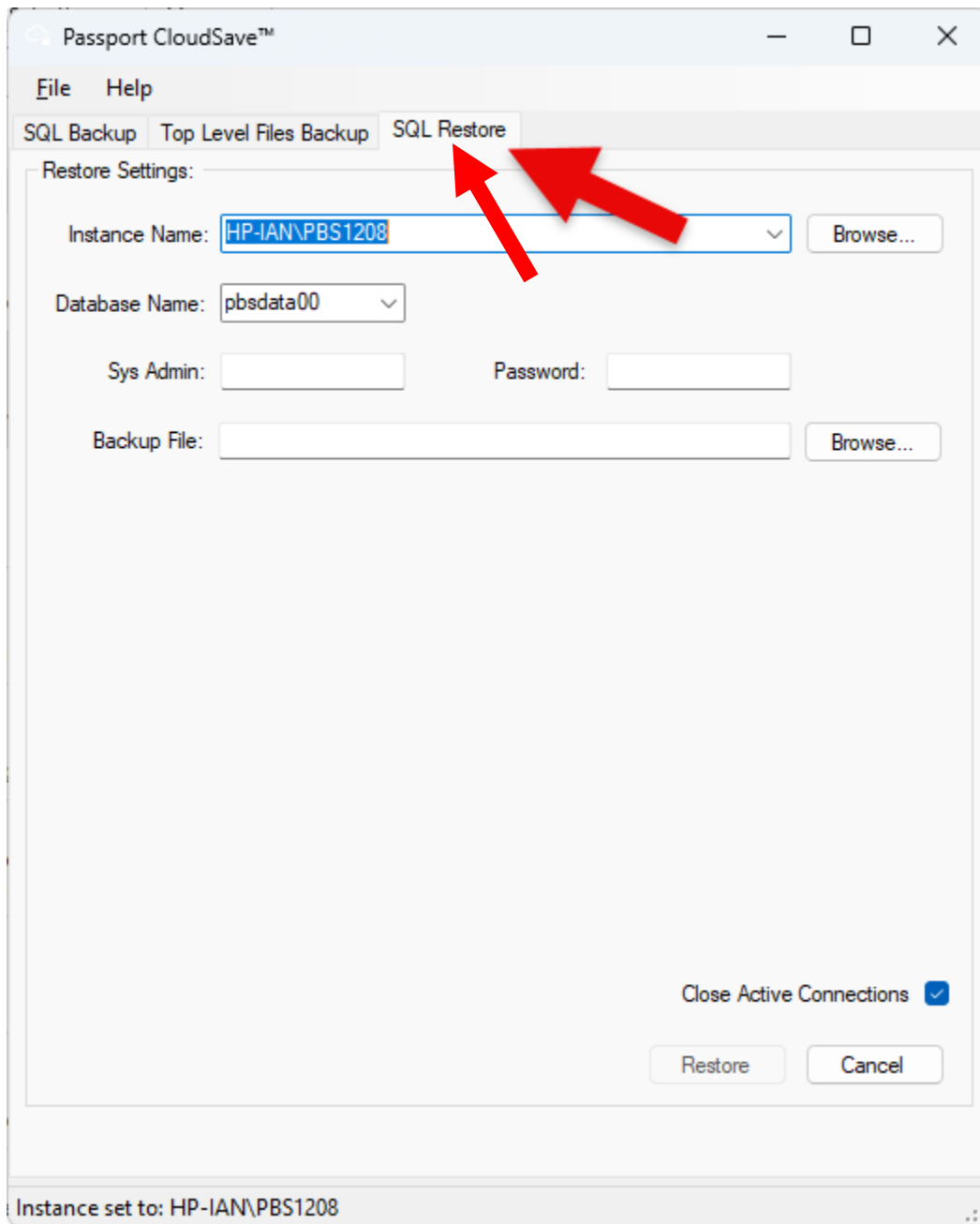
Backups can be large files. Download times depend on their size and your internet speed. Please be patient and let the download complete. The application will download and, if applicable, decrypt the file. The zip file will be in your chosen folder, ready to extract.

When you attempt to copy the contents or unzip your file, you will be prompted for the server administrator's password, entered when creating the **Passport CloudSave** job.

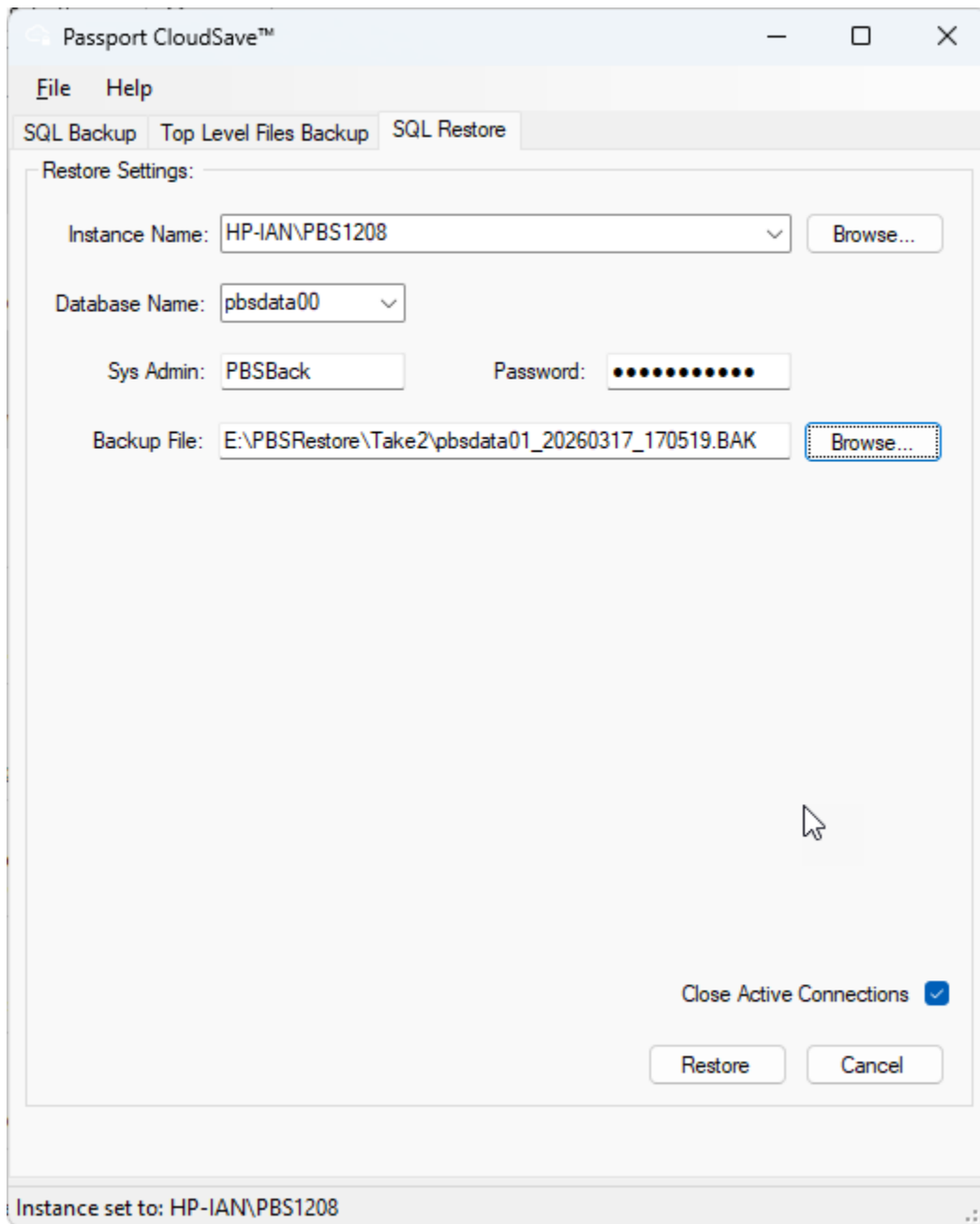


To restore a Top-Level backup, open the zip file and copy its contents to your Top-Level directory, overwriting any old files (assuming there are any).

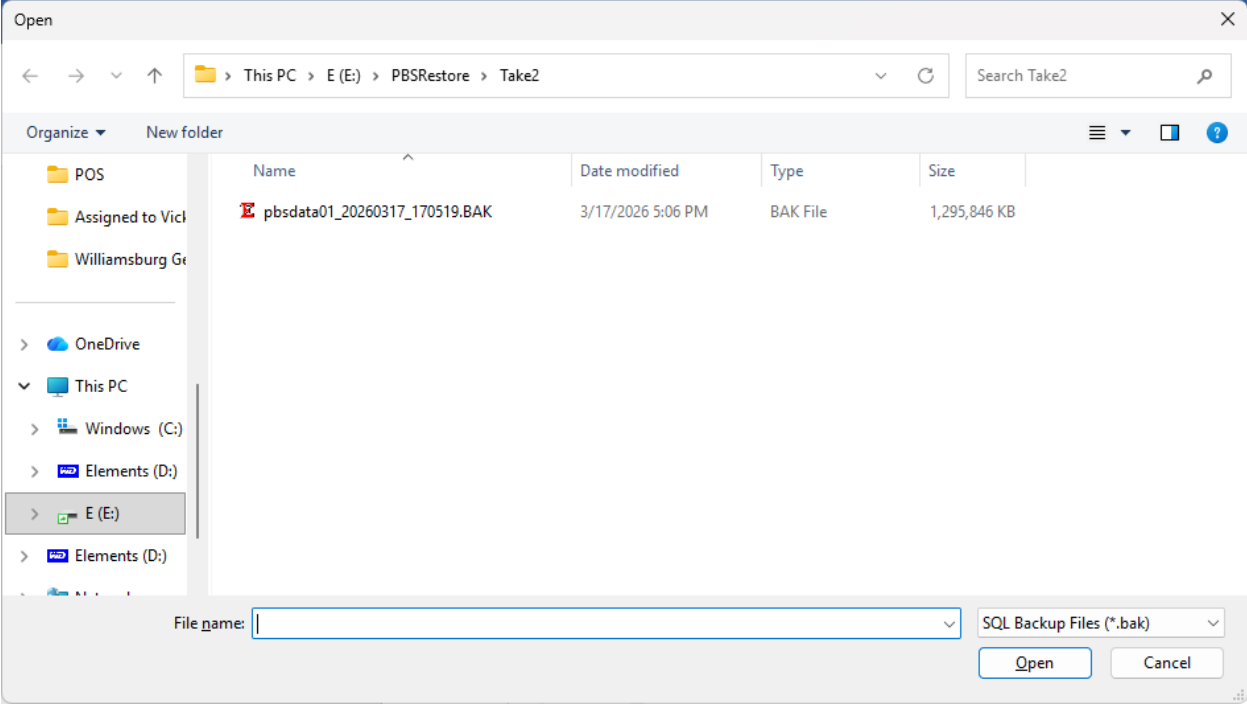
To restore an unzipped SQL backup from your restoration folder, use the *SQL Restore* option in **Passport CloudSave**. It's important to have all users log out of PBS before restoring your SQL Server. Select the instance and database names:

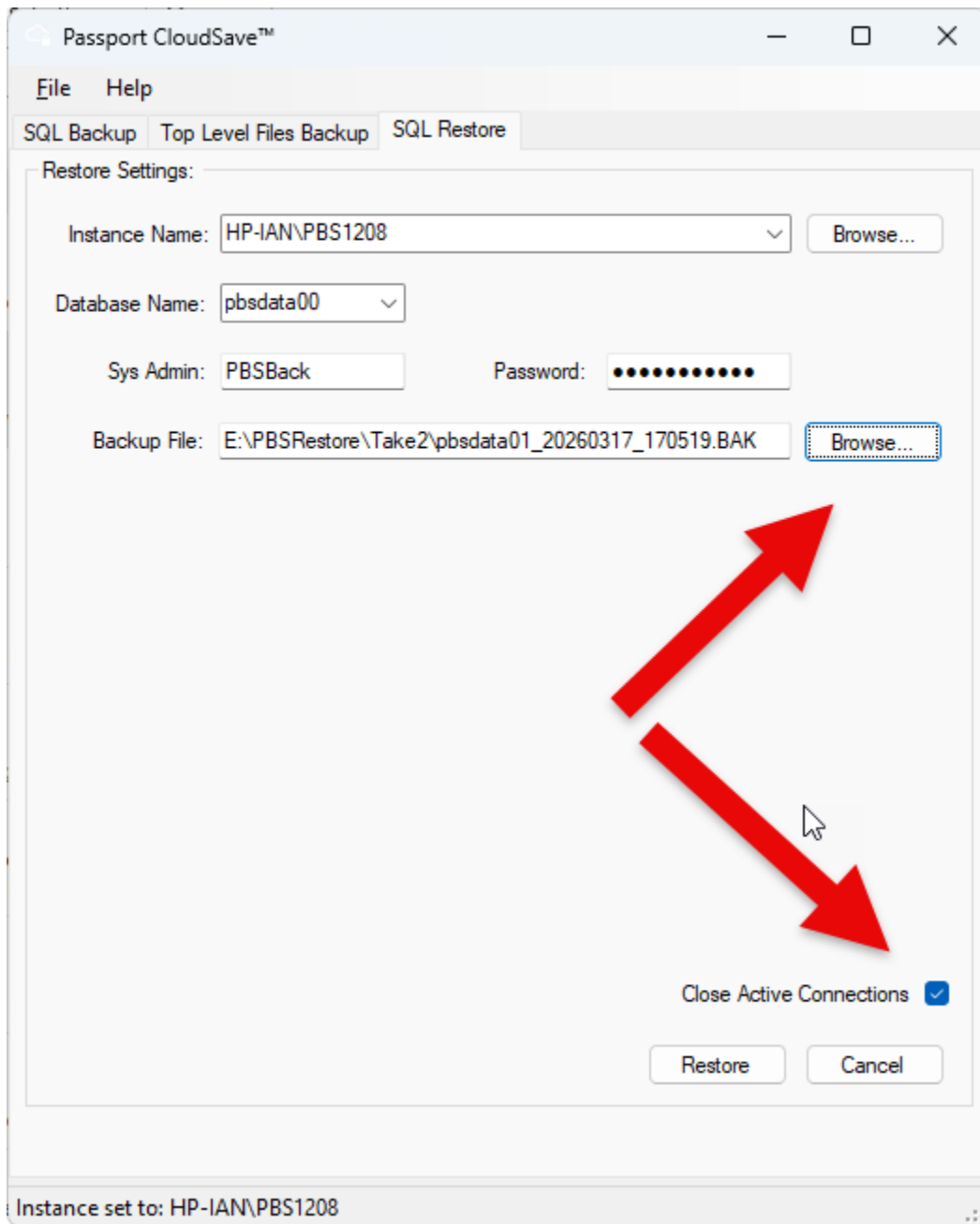


Enter the Sys Admin login and password. This is the SQL login created for doing your backups.



Now select the backup file you wish to replace. If you need to restore multiple databases, you will restore these one at a time. SQL database restoration is faster than TLD restoration.





All active users should be logged off at this stage, but the check box to *Close Active Connections* will force close any open sessions, then click *Restore*.

Repeat this process for each database you need to recover.