Palm-Tech
home inspection software

How To:

Transfer a Library File from one PC to Another

This step by step How To article explains how to move a library file from one PC to another.

For a complete list of available How To documents visit the Support section of our website: www.palm-tech.com/support/

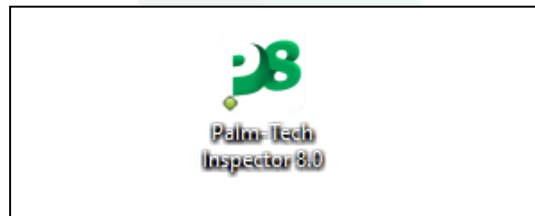**Library files contain key information such as: all your dropdown items, disclaimers, ratings and more. If you are using Palm-Tech on multiple PCs, or are setting up a new one, you will most likely want to move your library between the PCs. For most inspectors, the library file that will be used is named 'Default.ptlix'.**
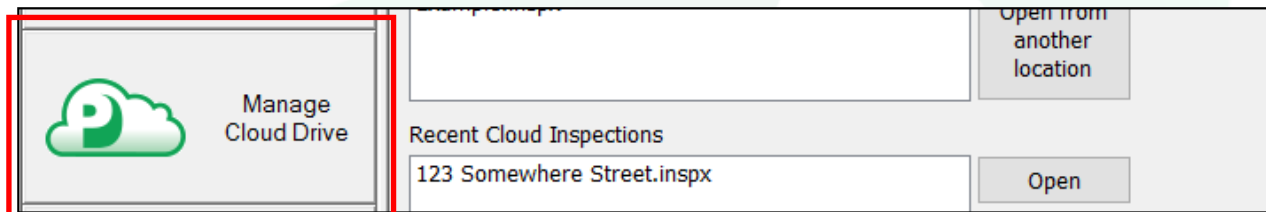
There are three main ways to transfer a library file from one PC to another. We'll cover all three methods in this document starting with the simplest (and recommended method). The three ways are: Using your cloud drive, doing a backup/restore, and manually grabbing the library file and moving it between PCs.
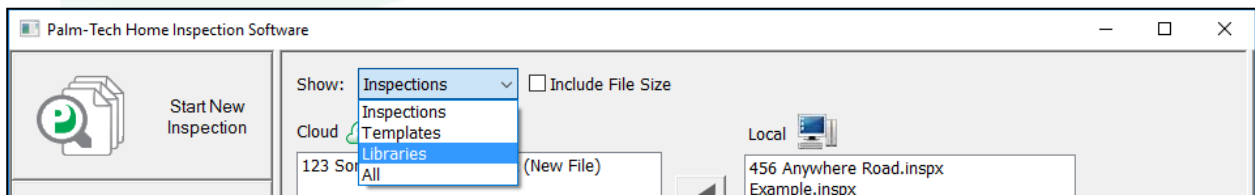
<u>Using the Cloud Drive</u>

1. The first step is to open the Palm-Tech program by double clicking on the icon on your desktop.

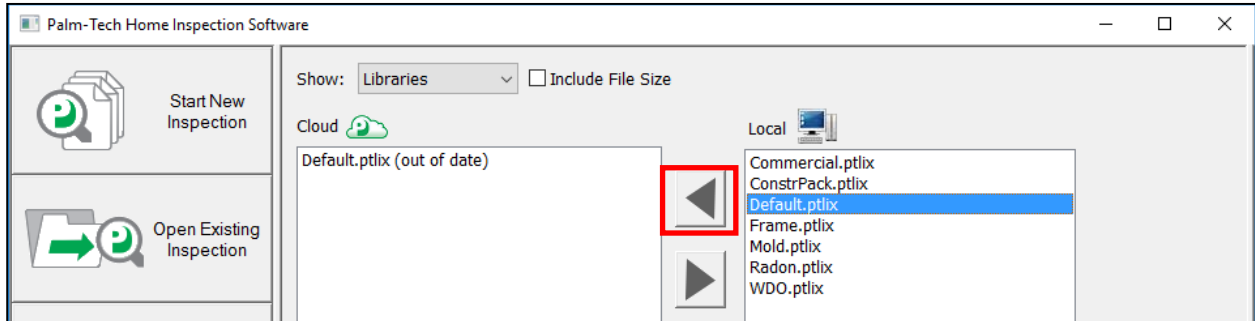2. Once the main program appears, click on the 'Manage Cloud Drive' tab on the left hand side.

3. Next, click on the dropdown next to 'Show' at the top and select 'Libraries'.
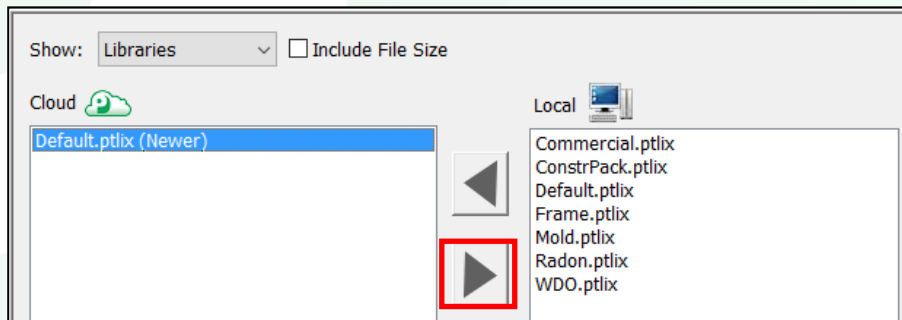
4. You will now see a listing of all of the libraries on your Local PC and on your cloud drive. The main library is 'Default.ptlix' and this is the one we want to move over. To do this, click on 'Default.ptlix' under local and then click on the top arrow (down the middle of the box) to send it to your cloud drive.

5. The library file will now be on your cloud drive. The final step will be to open Palm-Tech on the PC you want to move it to, click on 'Manage Cloud Drive', select 'Libraries' and then click on 'Default.ptlix' from the Cloud list and click on the button to send it to the local drive.

6. This will send the library from your cloud to the local PC. If the file already exists on the PC then the version of the library on the PC will be overwritten with the one on the cloud drive.
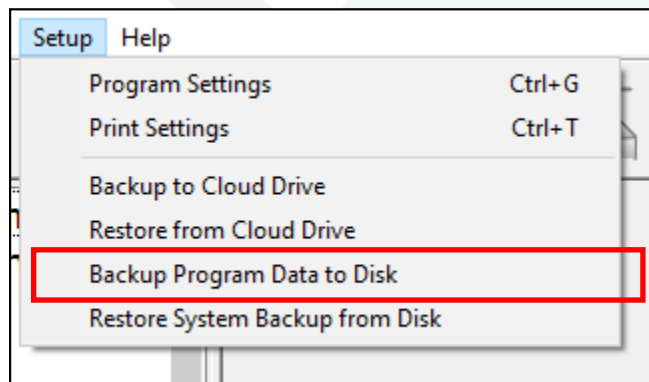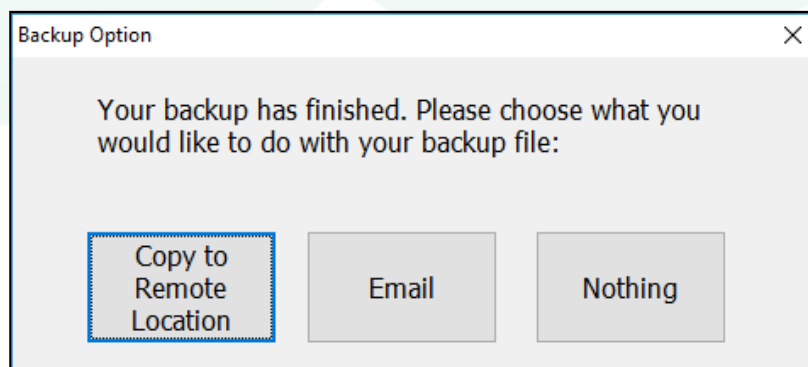
Doing a Backup/Restore

The second way to move the library from one PC to another is to do a backup and restore. It is important to note that with this process, you will be moving all of your libraries and all of your templates over to the PC and not just a single library. If you are looking to simply move one library to the second PC, then follow the steps on the pages above using the Cloud Drive method.

Creating the Backup

1. With the program already open, the first step is to click on Setup->Backup Program Data to Disk.
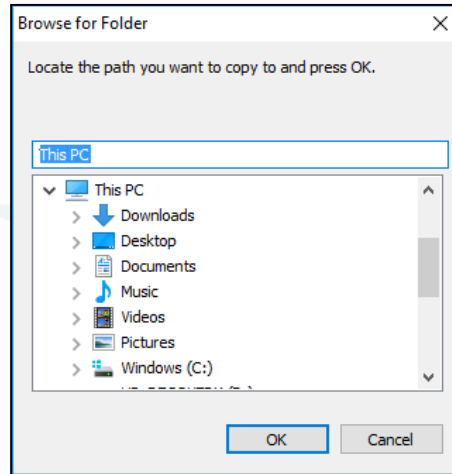

2. Next, you will be prompted with the following 'Your backup has finished. Please choose what you would like to do with your backup file:'. You have three options to choose from: Copy to Remote Location, Email and Nothing. You will want to choose the option that will be the most convenient for you to move the newly created backup file to the PC that you would like to restore it on. Detailed explanations of each option are below.
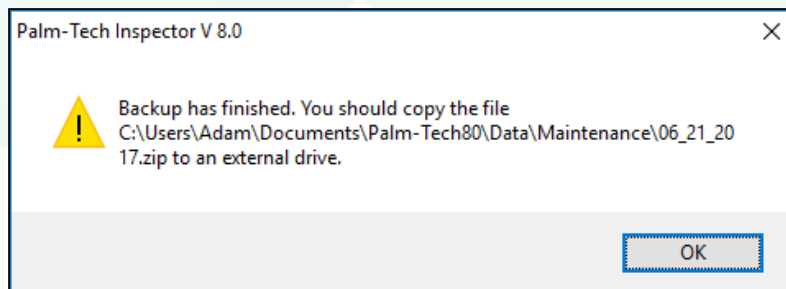
Copy to Remote Location – If you choose this option you will be prompted with a screen that allows you to navigate to a folder of your choosing to save the created backup file. This option works great if you have a USB drive plugged in, have a network location you want to save it too or if you know exactly where you want it to go.

Email - If you choose this option and you use an email program that is installed locally on your device then the program will automatically open your email, start a new email and attach the backup file to it so you can easily send it off. If you use a web based email (gmail, yahoo, etc) then the program will not be able to open your email program automatically.

Nothing – If you choose this option then the program will create your backup and automatically save it in C\Documents\Palm-Tech80\Data\Maintenance. The backup file will be named the current day's date and will be a '.zip' file. A message will appear like the one below showing you the exact path of the file:
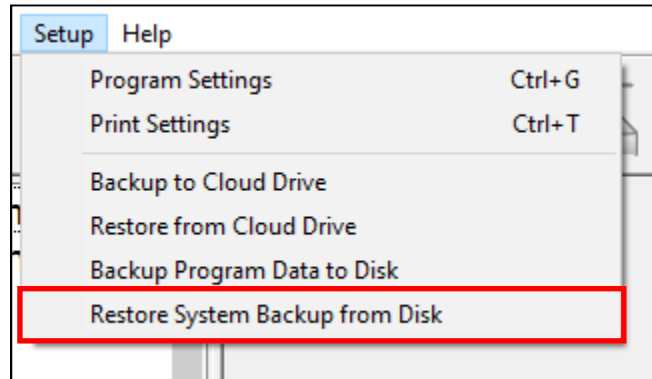

3. Now that the backup has been created and moved to the new PC that we want to restore it on, we are ready to restore it.
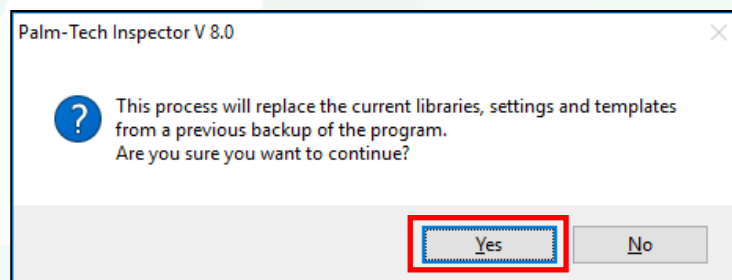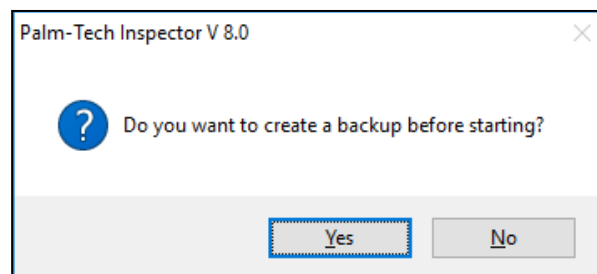
Restoring the Backup

1. To restore the newly created backup you will first need to make sure that the backup file was moved successfully to the new PC. Once this is complete, the first step is to go to Setup->Restore System Backup from Disk.

2. Next a message appears asking if we are sure that we want to start the process of restoring a backup. Click on 'Yes'.
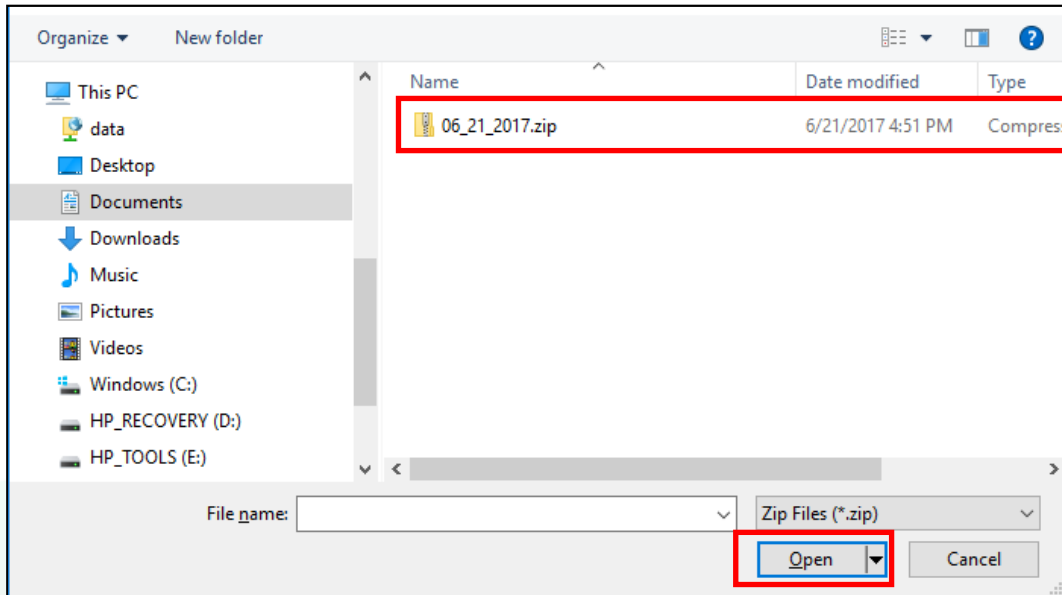

3. Next a message will appear asking if you want to create a backup of the information that is currently on the PC. If this is a PC that you have done some customizing on or worked with, and there is any chance that you would want to go back to the libraries, templates, or settings that are on there, click on 'Yes'. If this is a new PC and you haven't done any work with Palm-Tech yet then you can simply click on 'No'.
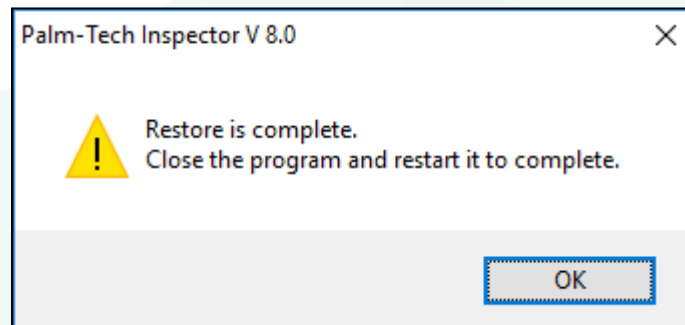
4. Now a screen will appear that will allow us to navigate to the location of the backup file we created and then moved to the PC. Once you navigate to where the file is located, click on it and then click on 'Open'.

5. A message will now appear stating 'Restore is complete. Close the program and restart it to complete'. This means that the restore has been successful.

6. Completely close out of everything related to Palm-Tech and when you reopen it, all of the files from the backup will be available for use.

Manually Moving a Library Over

The last method is to manually move the library from one PC to another.

1. The first step is to close out of all programs related to Palm-Tech.

2. Next, open up File Explorer (or you Documents folder) and navigate to your Palm-Tech80 Folder. It will be located in C\Documents\Palm-Tech80

3. Now, double click on the 'Data' folder.

Name	Date modified
Archive	6/22/2017 11:27 AM
Data	6/22/2017 11:53 AM
Example.inspx	5/22/2017 11:40 PM

4. In the Data folder you'll see a list of files. You'll want to locate the file named 'Default.ptlix'.

Name	Date modified	Type	Size
Templates	6/22/2017 11:28 AM	File folder	
Commercial.ptlix	5/4/2017 9:28 AM	PTLIX File	
ConstrPack.ptlix	5/4/2017 9:28 AM	PTLIX File	
Default.ptlix	5/4/2017 9:28 AM	PTLIX File	
Frame.ptlix	5/4/2017 9:28 AM	PTLIX File	
log.txt	6/22/2017 11:32 AM	Text Document	
Mold.ptlix	5/5/2017 4:26 PM	PTLIX File	

5. From here you'll need to take this file and move it to the second PC. You can do this via email, a network drive, USB drive etc. Once it is on the PC you'll simply need to navigate to the same folder (C\Documents\Palm-Tech80\Data) and save the library in it.