

Backup/Restore Portfolio

A customized Unfair Advantage portfolio system is a beautiful thing. Each individual portfolio can hold the key to the unique trading strategies used for each of your trading systems, complete with your own user-defined continuous series for individualized analysis. A comprehensive portfolio can represent perhaps an hour or more of time spent defining a unique set of markets and parameters. Why wouldn't you want to preserve a backup copy -- just in case something happens to your portfolio file?

Reasons to back up your portfolio:

- In case of file corruption
- In case of unwanted changes by the user
- In case a new UA installation requires deletion of your working portfolio
- In case a UA upgrade damages your portfolio

Making a Portfolio Backup

If you have customized your portfolios and any of the above scenarios leaves you with no portfolio file (or an unwanted one) you'll probably want to restore your backup copy of your portfolio listings. Doing so will eliminate the need to re-enter your lists of files and charts and, perhaps more importantly, specifications for the custom computed contracts you wish to view. Of course, this process requires that you first backed up your existing portfolio file, as described here, before deleting or overwriting it, and before the damage occurred.

Any time you back up your entire \UA directory, your portfolio file is included automatically. If your latest \UA backup was made since any portfolio changes, it is probably not necessary to make a separate portfolio backup. See [Backing Up UA](#) for instructions on backing up the full Unfair Advantage system.

You can save a copy of your portfolio file separately with these steps:

1. Right-click your computer's START button, then click "Explore." In the left window of your screen, scroll to the \UA folder.
2. Double-click the \UA folder to reveal the \ARCHIVES folder within, which you should double-click to view a list of files (on right side of your screen).
3. Click the **portfile.adm** file, then click the Edit menu at the top of your screen. From that menu, click "Copy."
4. Navigating back in the left window of your screen, click the \TEMP folder. If your TEMP folder holds your last UA backup (in the \UAbackup directory), we recommend you place your current portfolio with your previous backup of the entire software system. To do so, double-click the \UAbackup folder, then double-click ARCHIVES.
5. Go to the Edit menu and click "Paste."

When properly done, this operation creates a duplicate copy of your portfile.adm file in your \UAbackup\UA\ARCHIVES directory, just as it would be if you had backed up the entire UA system.

An alternate method is to store the portfile.adm file in another directory of your choice. To do so, in step 4, instead of going to the UAbackup folder, select the directory where you want to place your backup portfolio file.

Restoring a Portfolio

Follow these steps to restore your backup portfolio file.

If your portfolio file was backed up as part of your last full Unfair Advantage (\UA) backup, or you stored your latest portfolio backup within your \UA backup, you can restore that copy as follows:

1. Right-click your computer's START button and click "Explore."
2. Navigate through the left window to the \UAbackup folder. Click it to reveal its contents, then double-click the UA folder. From there, click the ARCHIVES folder and, finally, click the **portfile.adm** file.
3. Go to the Edit menu and click "Copy."
4. Back in the left window of your directory tree, click your \UA folder. From there, click ARCHIVES.
5. Go back to the Edit menu and click "Paste." You may be asked if you want to overwrite an existing file. Answer YES.

This should restore your previous portfolio to the current UA directory.

If your portfolio file was backed up separately (not part of a full \UA backup), use the steps above, but in Step 2, navigate to the folder where your backup portfolio file was stored.

An alternate method of restoring a preserved portfolio is to use UA's "[Import portfolio](#)" option on the Portfolio menu, which will add the stored portfolio to your current portfolio.