ProSystem *fx*© Engagement

Database Backup and Restore Instructions

Version 5.7

Instructions

Fall 2008

CCH
a Wolters Kluwer business

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Overview

This utility has been created to aid administrators in the backup and restore process for the ProSystem *fx* Engagement CentralAdmin and bin databases. Please note that the SQL databases used for Engagement may not be backed up using your standard backup procedures. Because direct access to the databases is required, you must either use this utility to back up the database files, or use a SQL Agent available from your third party backup software vendor. For additional information on configuring a SQL Agent, please refer to the ProSystem *fx* Networking Best Practices document located in the Documents folder on the ProSystem *fx* Engagement CD or contact Engagement Customer Support.

This utility is designed for back up and restore of the CentralAdmin database and all bin databases for a single main or secondary office server. This utility will need to be run separately on each Office Server in your ProSystem *fx* Engagement environment.

IMPORTANT: To restore a single deleted binder to a Central File Room you must use the ProSystem *fx* Engagement Database Backup & Restore Utility. Your third party backup and restore software is unable to restore a single binder that has been deleted from the Central File Room.

Also, the Database Backup & Restore Utility is the best tool to assist you in migrating the ProSystem *fx* Engagement Administrator module from one server to another.

Removing Prior Versions of the Utility

Prior versions of the Backup and Restore utility are not compatible with Engagement v. 5.7 and backup files (*.bak) from previous versions of the utility may not be restored to v. 5.7. **Ensure that a current backup is completed before and after converting to v. 5.7.**

The installation of the Engagement Administrator module will automatically install the updated Database Backup and Restore Utility to the x:\Pfx Engagement\Admin\Utilities\Backup Restore directory. After the installation, please verify the current backup procedures. See the **Running the Backup Utility (using Scheduler)** section below.

Note: A new.bak file is created with each backup process.

Backup Considerations

This utility will create a single backup file that contains the backup of the office server CentralAdmin database and each bin database. The backup of each bin database will include individual binder database information. (If you installed ProSystem *fx* Engagement to the default installation path, the database files that will be backed up are located in the following directory: x:\Pfx Engagement\Admin\Data.)

If a failure occurs while backing up a specific database, that database will be skipped and this information will be reported in a log file. The log file will be located in the same directory as the BackupRestoreUtil.exe with the default name of LogFileForBRMMDDYYYY – HH MM SS. The backup process will continue after such a failure occurs to ensure the remaining databases are properly backed up. If a failure occurs with a specific database during a backup, please contact Engagement Customer Support for assistance.

The following should also be considered when performing a database backup:

Additional files to be backed up: To ensure a complete backup, the files in the following folders will need to be backed up separately using your current backup methods. (The files stored in these

folders are not included in the backup that is generated by the ProSystem *fx* Engagement Database Backup & Restore Utility):

1. Workpapers folder
2. Admin Packages folder
3. Archive folder
4. Transition Binder Packages folder

IT IS IMPERATIVE that the workpaper backup and the SQL database backup are completed together and that no changes occur to either during the backup.

Back up the database backup file: In addition to backing up the folders listed above with your current backup methods, be sure to also back up the database (.bak) file.

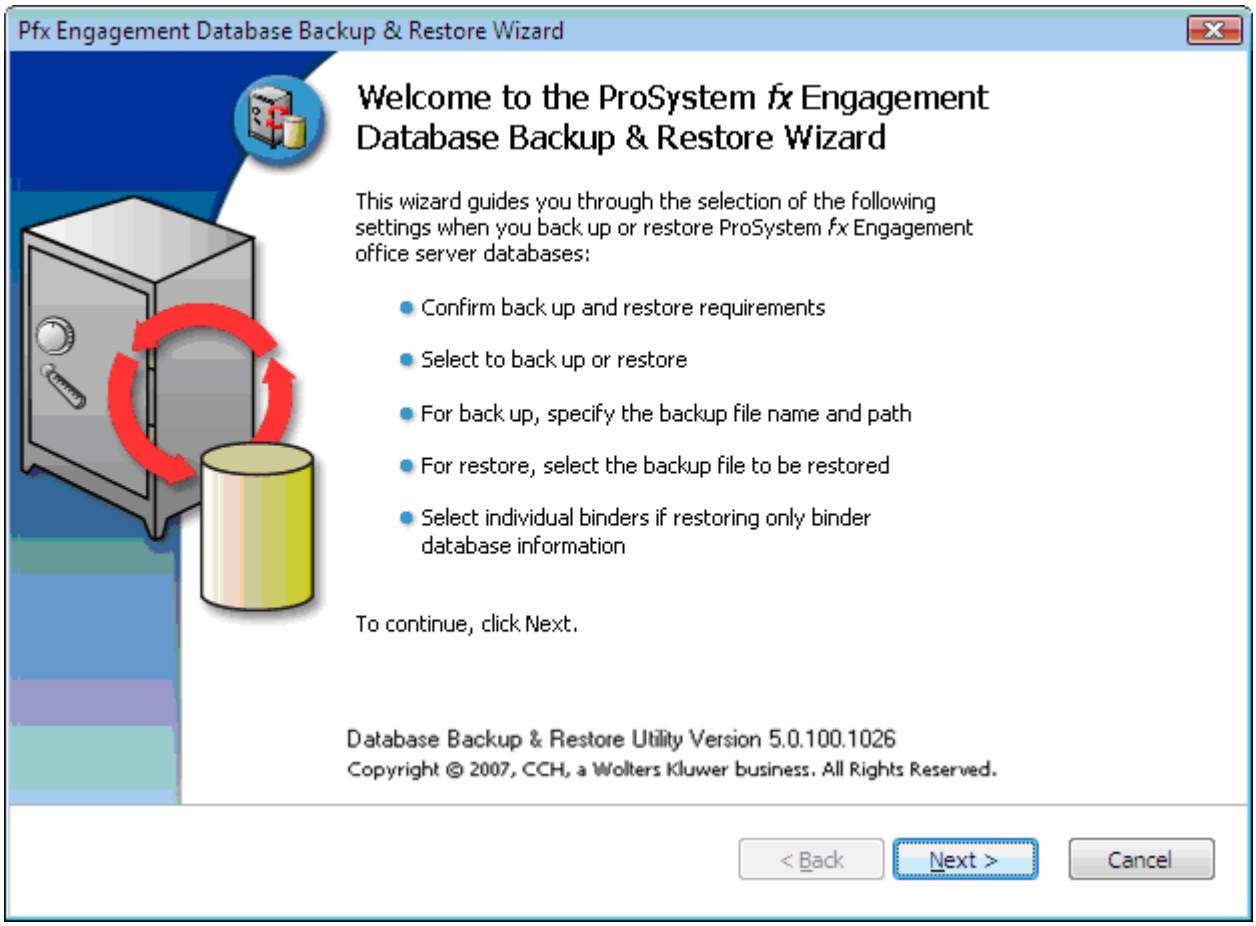
Disable synchronization: We highly recommend you disable admin and binder synchronization before beginning the backup process to ensure that the databases and workpapers contain identical information. During the time of the backup process, synchronization will not be allowed. Users attempting to synchronize during this time will receive an error.

Close ProSystem *fx* Engagement Administrator: To run the Database Backup & Restore Utility, the ProSystem *fx* Engagement Administrator application will need to be closed.

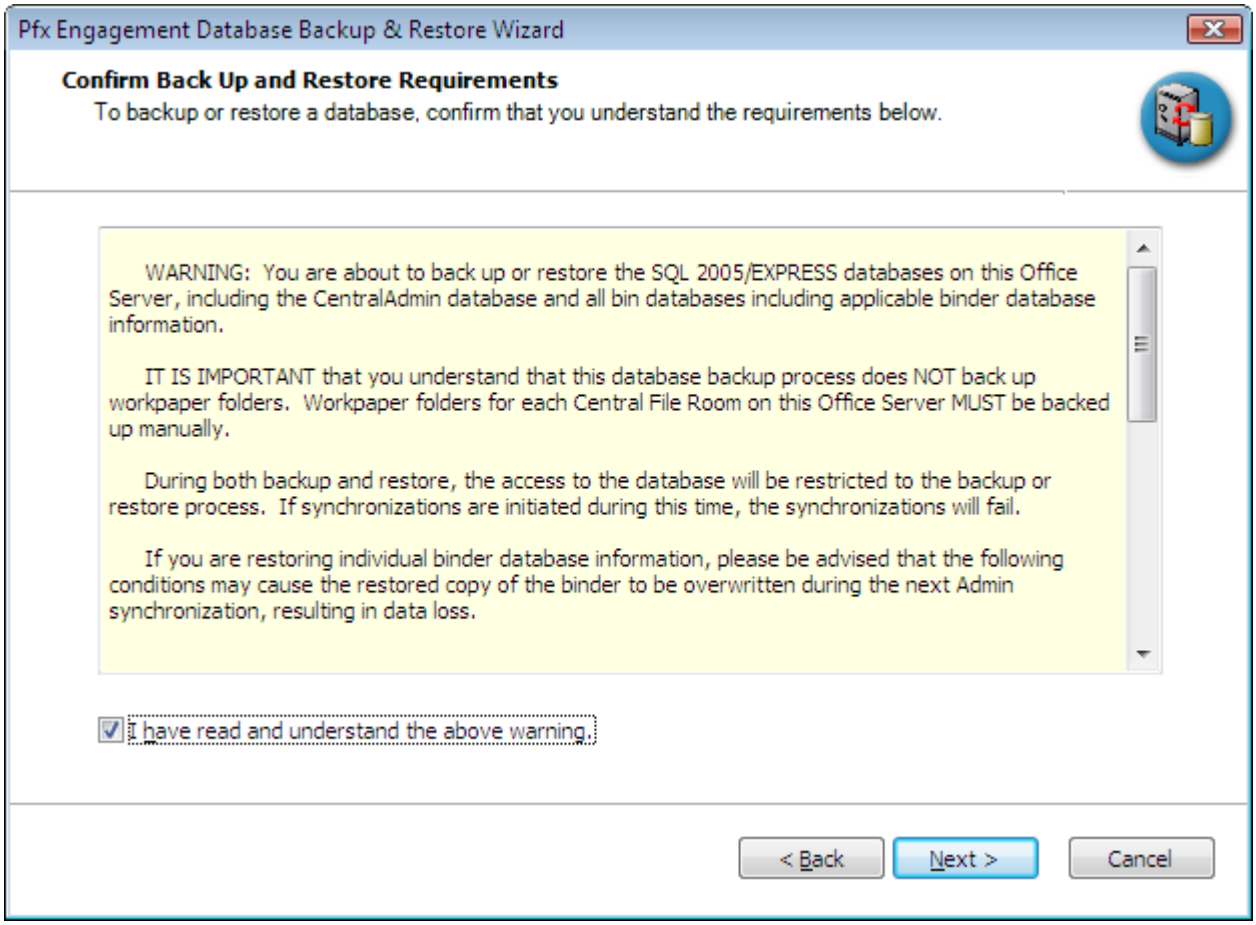
Running the Backup Utility (with User Interface)

The following steps will guide you through the Backup process:

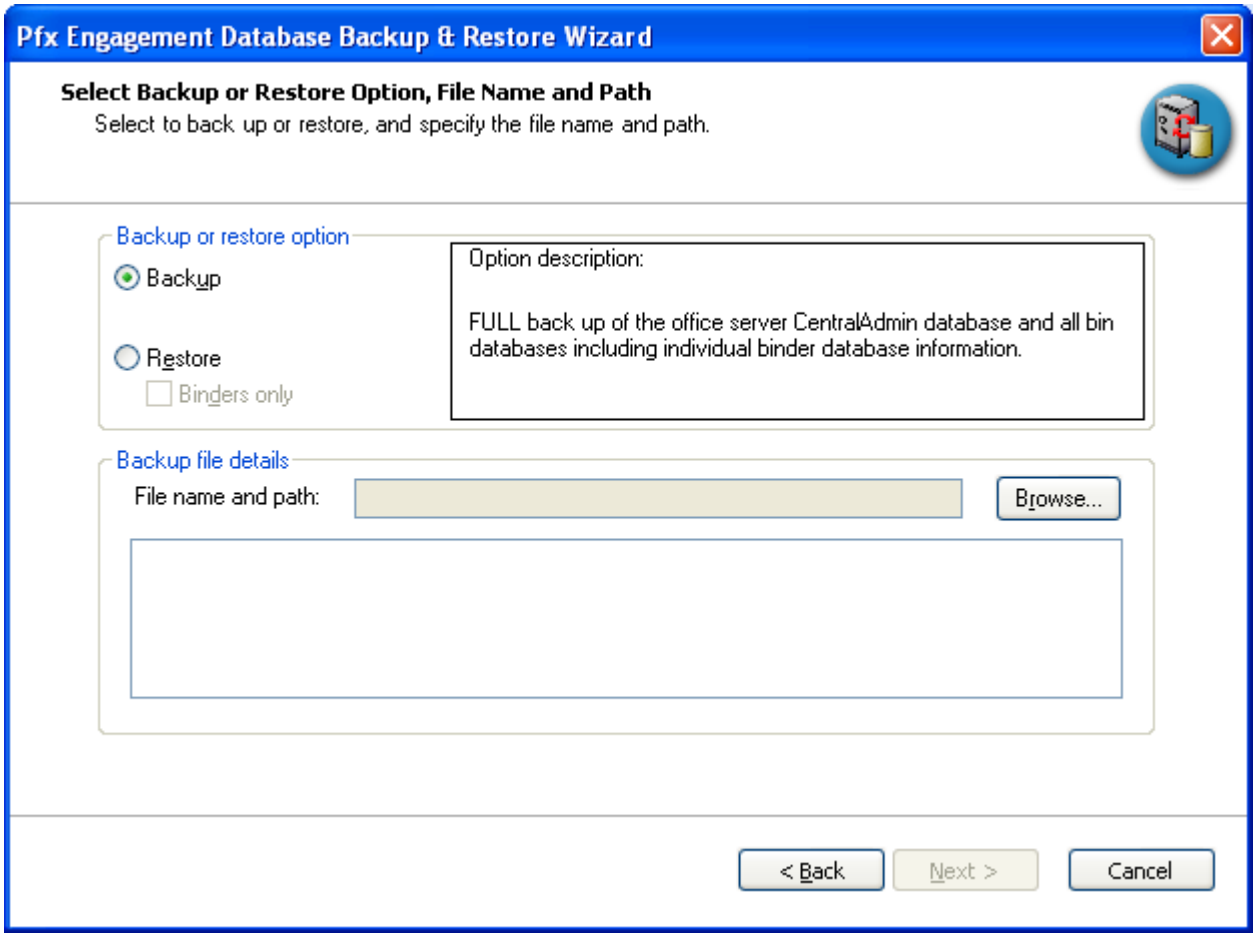
1. Launch the Database Backup & Restore Wizard using one of the following two methods:
    a. Select **Start/Programs/ProSystem fx Engagement/Utilities/ProSystem fx Engagement Database Backup & Restore Utility.**
    b. In Windows Explorer, double-click on **BackupRestoreUtil.exe**. (The BackupRestoreUtil.exe will be located in the x:\Pfx Engagement\Admin\Utilities\Backup Restore directory.)
2. Select **Next** from the *Welcome* dialog.



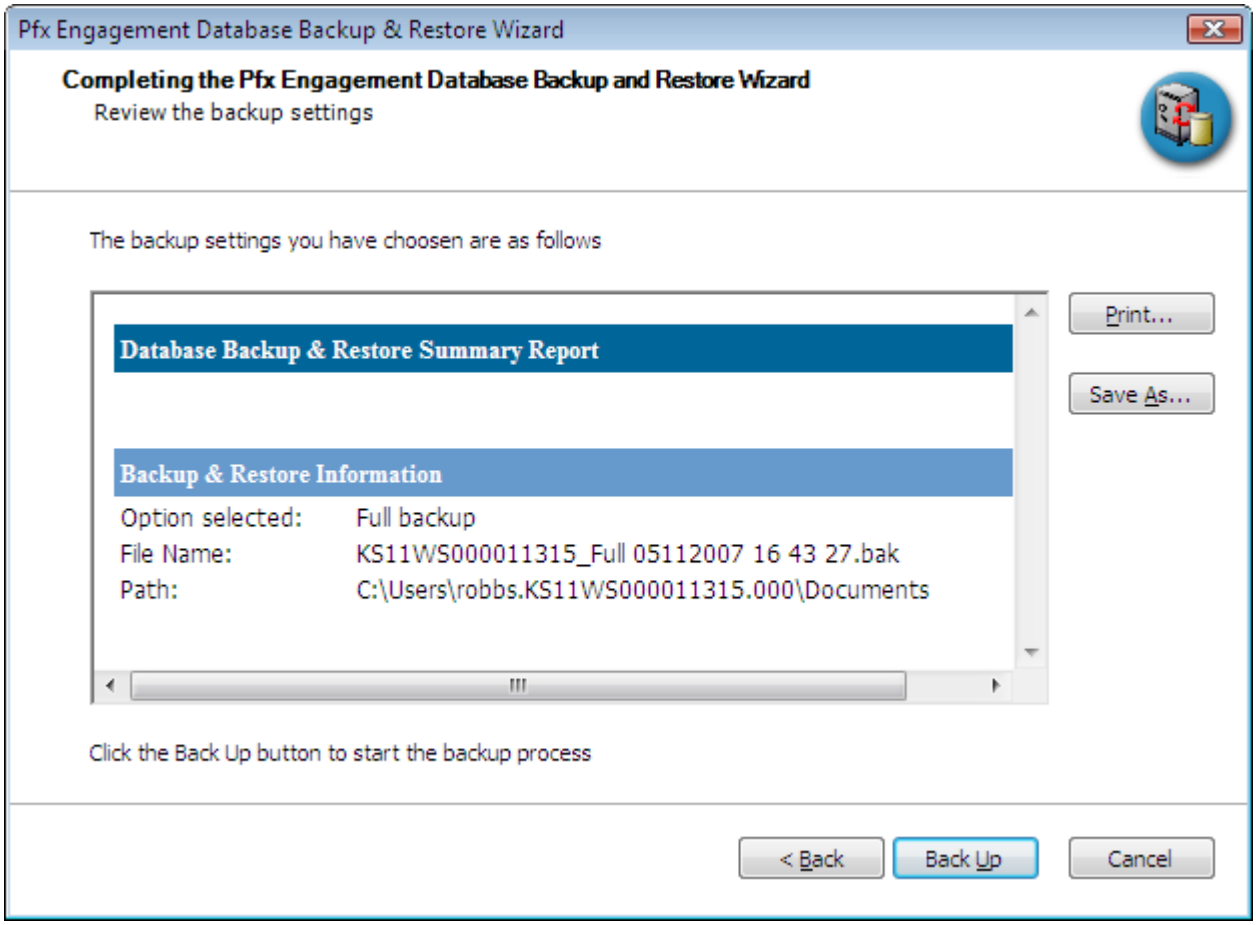
3. After you have read and understand the information regarding backup, check the box and select **Next**.



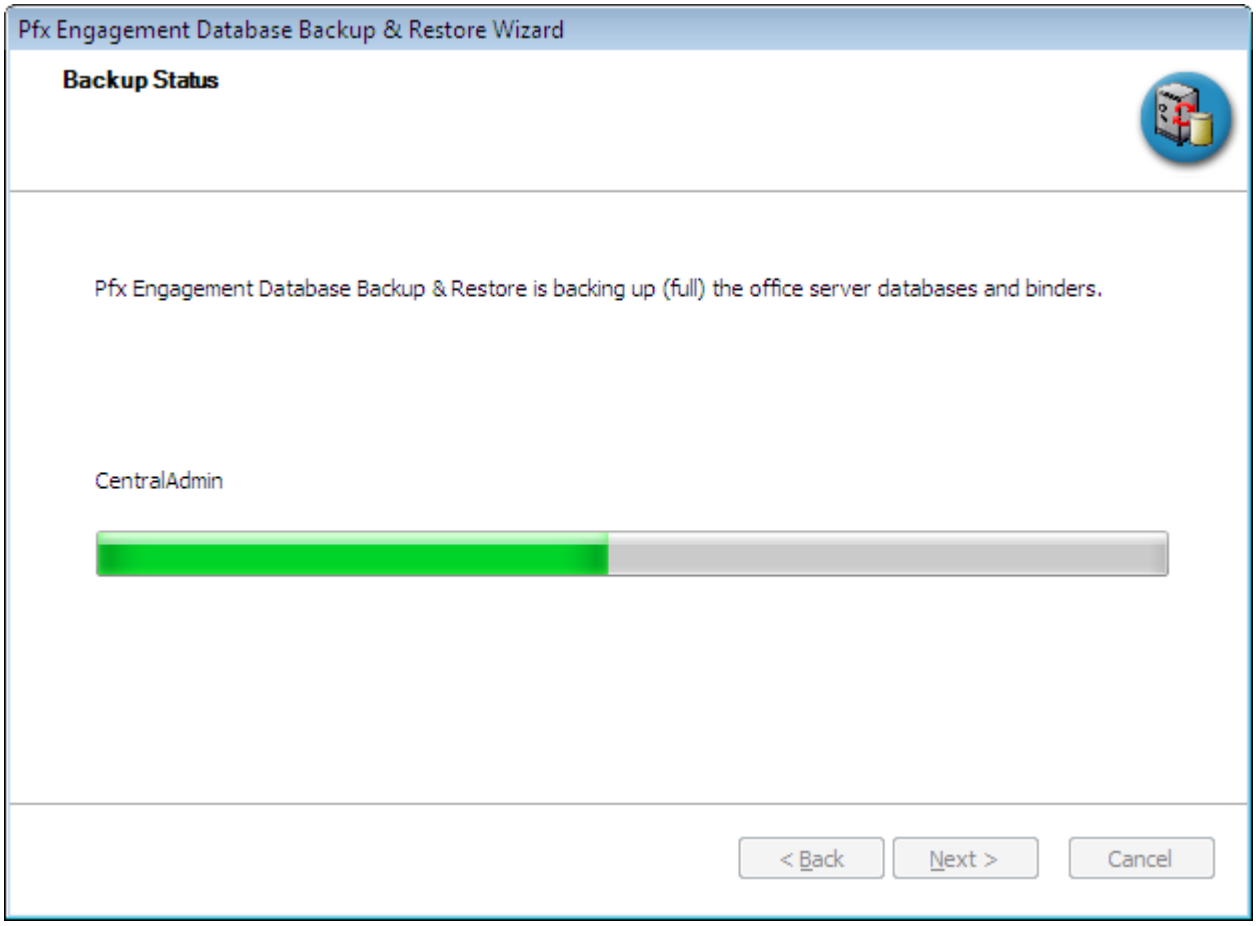
4. Select the **Backup** radio button. Provide the location where the files are to be stored by selecting **Browse**. The selected location must be on a local drive/directory or a mapped network drive. If you select a mapped network drive, the user account under which the SQL Server service is running must have credentials to write to that mapped network location. Select **Next**.



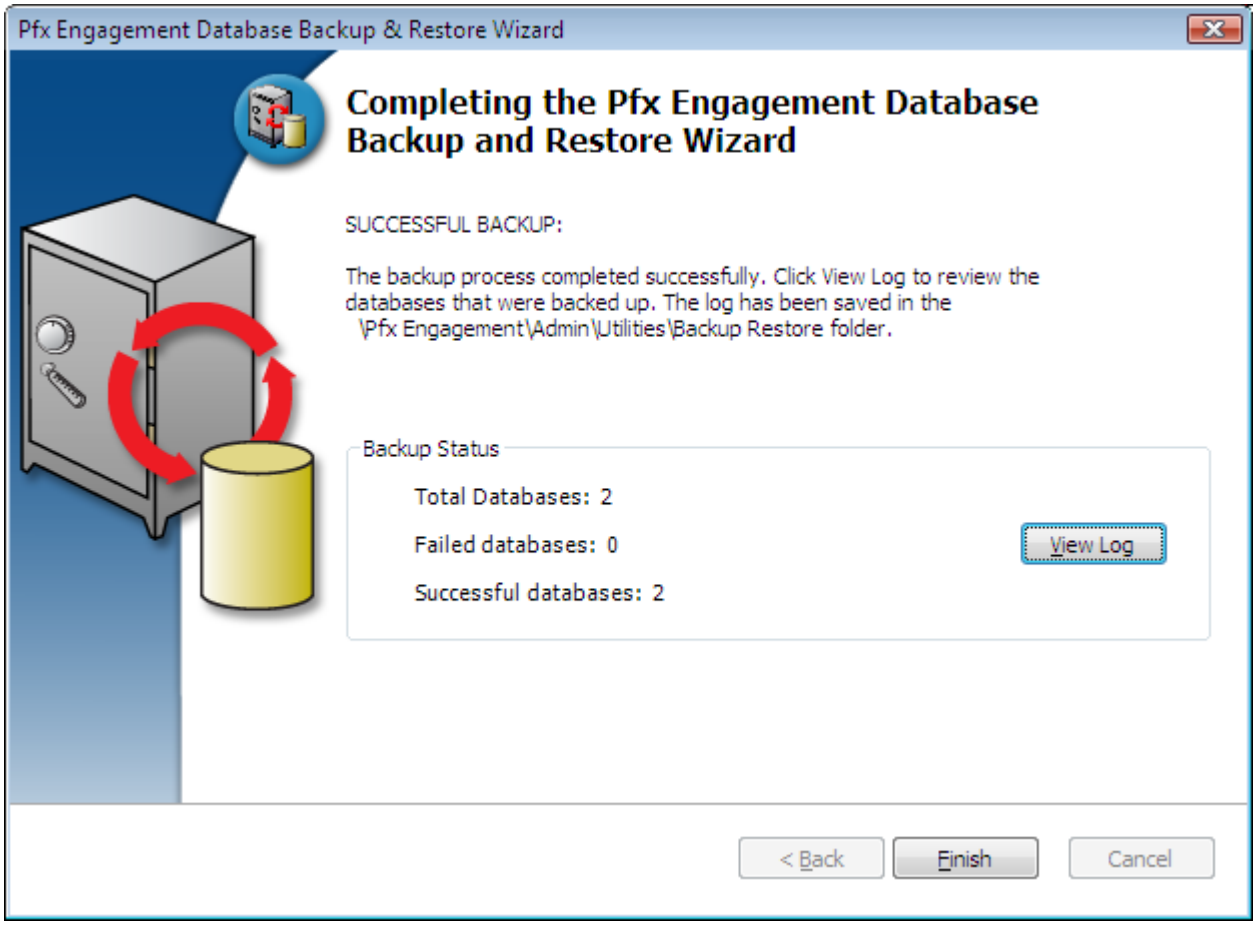
5. Review the backup settings and select **Back Up** to begin the backup process.



6. A progress indicator page will display to show you the progress of the backup.



7. Once complete, the *Database Backup & Restore Wizard Completion* page will display the number of databases that were successfully backed up and the number that failed to be backed up. Select **View Log** to view a log detailing the backup information for each database. Select **Finish** to exit the wizard.



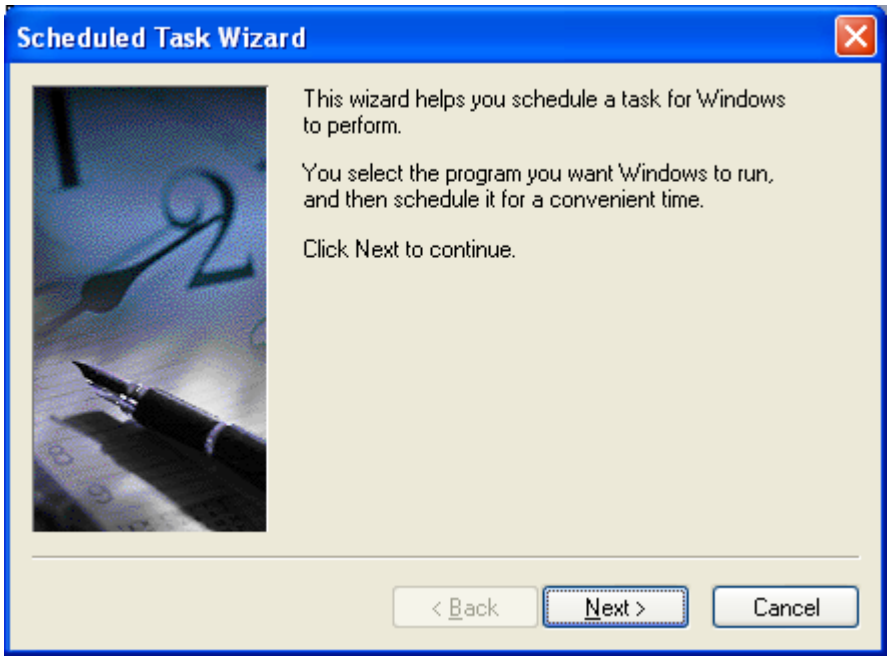
Note: At the end of the process, only one .bak file will be created. This single file will contain the backups for all of the Office Server databases. The default name for the backup file is Office Server Name_Full MMDDYYYY HH MM SS.bak.

Running the Backup Utility (using Scheduler)

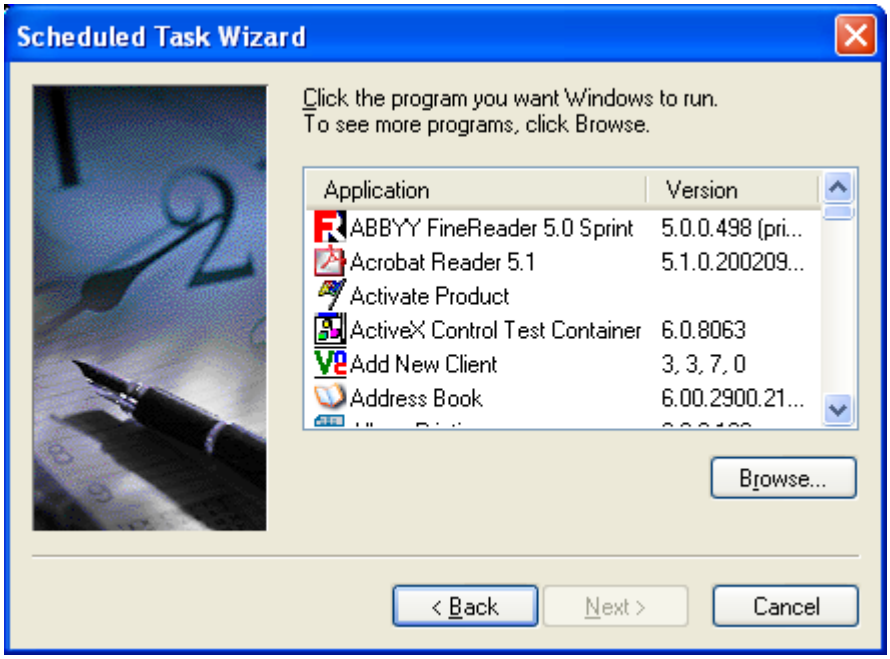
By running this utility via task scheduler, we assume you have agreed to the warning in step 3 above in the User Interface section.

Creating a new task:

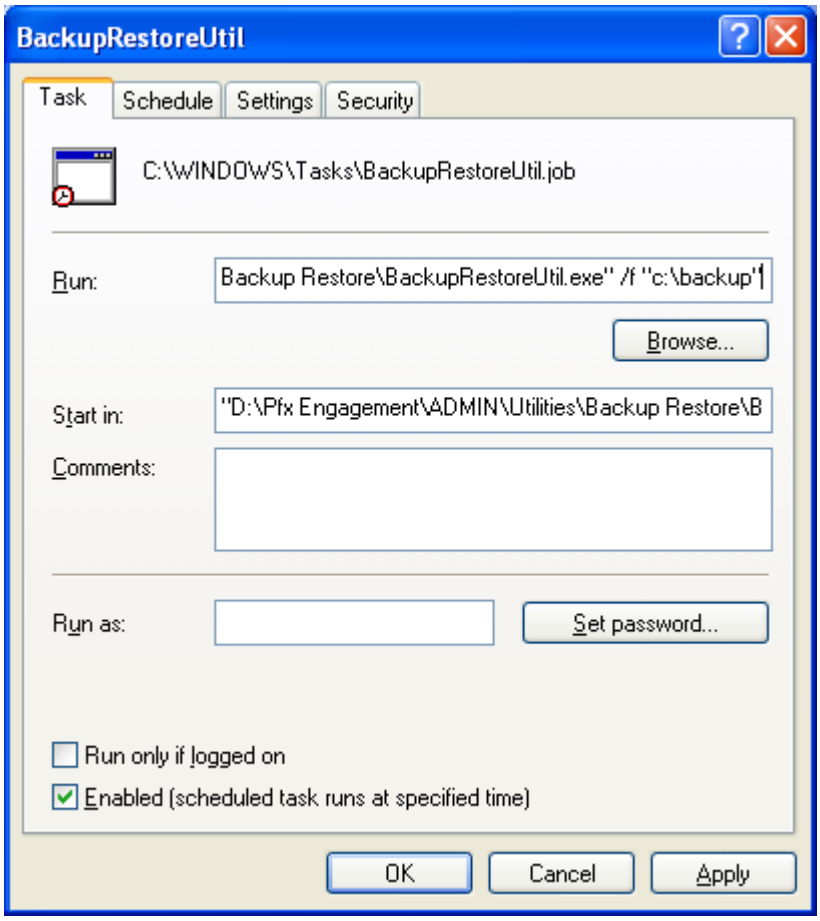
1. Open Microsoft Scheduler.
2. Select **Add New Task**.
3. Select **Next** on the *Scheduled Task Wizard Welcome* screen.



4. Choose the BackupRestoreUtil.exe application by selecting the **Browse** button and navigating to its location (x:\Pfx Engagement\Admin\Utilities\Backup Restore).



5. After adding all of the settings for the new task, right click on the new task and select **Properties**.



6. In the Run box, you will need to add the proper switch and path information. After the existing path add ***/f*** (this must be entered in lowercase text) followed by a space and then add the destination path where you would like the backup files to be placed.
   (e.g. "D:\Pfx Engagement\ADMIN\Utilities\Backup Restore\BackupRestoreUtil.exe" ***/f*** "c:\backup").

NOTE: The command line parameter /f **must** be entered in lowercase. Using an uppercase F will result in an incomplete backup.

7. Click Apply or OK to save the information.

Restore Considerations

Restore is a critical part of the disaster recovery process. Due to the nature of the application and the fact that the application document control relies on the database to ensure workpaper integrity, very specific restore procedures must be followed.

> **Note:** While the restore process can be performed on your own, we strongly recommend you contact Engagement Customer Support at 1-800-PFX-9998 option 6, followed by option 2, before attempting to restore any data.

If a failure occurs while restoring a specific database or binder, that database / binder will be skipped and this information will be reported in a log file. The log file will be located in the same directory as the BackupRestoreUtil.exe with the default name of LogFileForBRMMDDYYYY – HH MM SS
The restore process will continue after such a failure occurs to ensure the remaining databases or binders are properly restored. Should a failure occur with a specific database or binder during the restore process, please contact Engagement Customer Support for assistance.

The following should also be considered when restoring databases or binders:

Additional files to be restored: This utility will restore the office server bin databases and the CentralAdmin database contained within the selected backup file. If selected, the utility can restore individual binder database information only. It will NOT restore the central file room workpapers or other files that were backed up separately – those files must be restored separately.

To ensure a complete restore, the files in the following folders will need to be restored separately using your current restore methods (The files stored in these folders are not included in the backup that is generated by the ProSystem *fx* Engagement Database Backup & Restore Utility):

1. Workpapers folder
2. Admin Packages folder
3. Archive folder
4. Transition Binder Packages folder

IT IS IMPERATIVE that the workpapers and SQL databases are restored and completed together and that no changes occur to either during the restore. When restoring individual binder database information, do not restore the workpapers for all binders in the database. Restore only the workpapers for the individual binder database information being restored.

Disable synchronization: We highly recommend you disable admin and binder synchronization before beginning the restore process. During the time of the restore process, synchronization will not be allowed. Users attempting to synchronize during this time will receive an error.

Review administrative changes since last backup: When restoring from backup, you will need to be aware of what administrative changes may have taken place since this backup took place. If any of the following changes occurred since this back up, please contact Engagement Customer Support for assistance:

- Create or delete central file room
- Change workpaper location
- Add, remove or reassign licenses
- Workpapers checked in/out

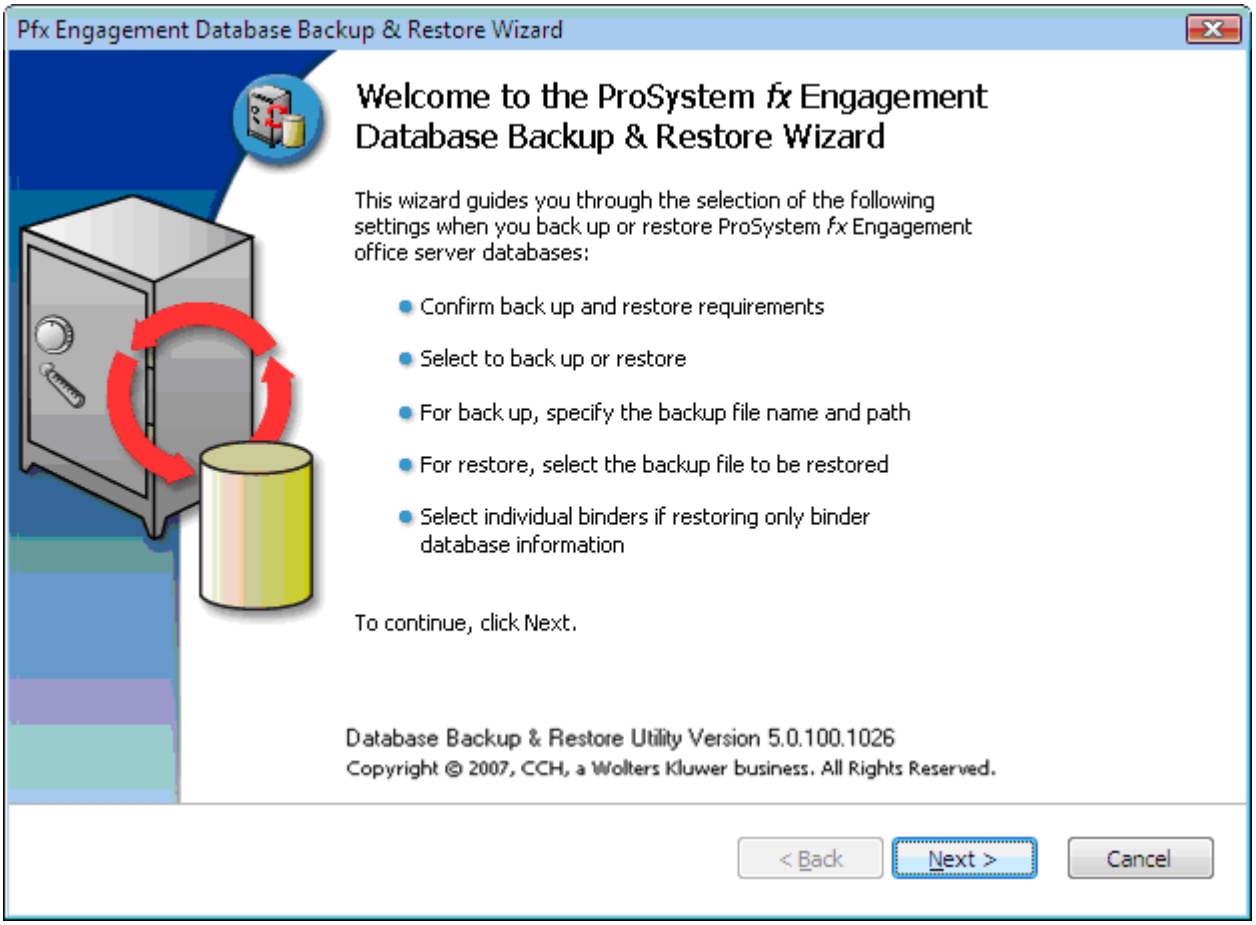
- Add or remove staff members
- New binders synchronized to central file rooms

Close ProSystem *fx* Engagement Administrator: To run the Database Backup & Restore Utility, the ProSystem *fx* Engagement Administrator application will need to be closed.

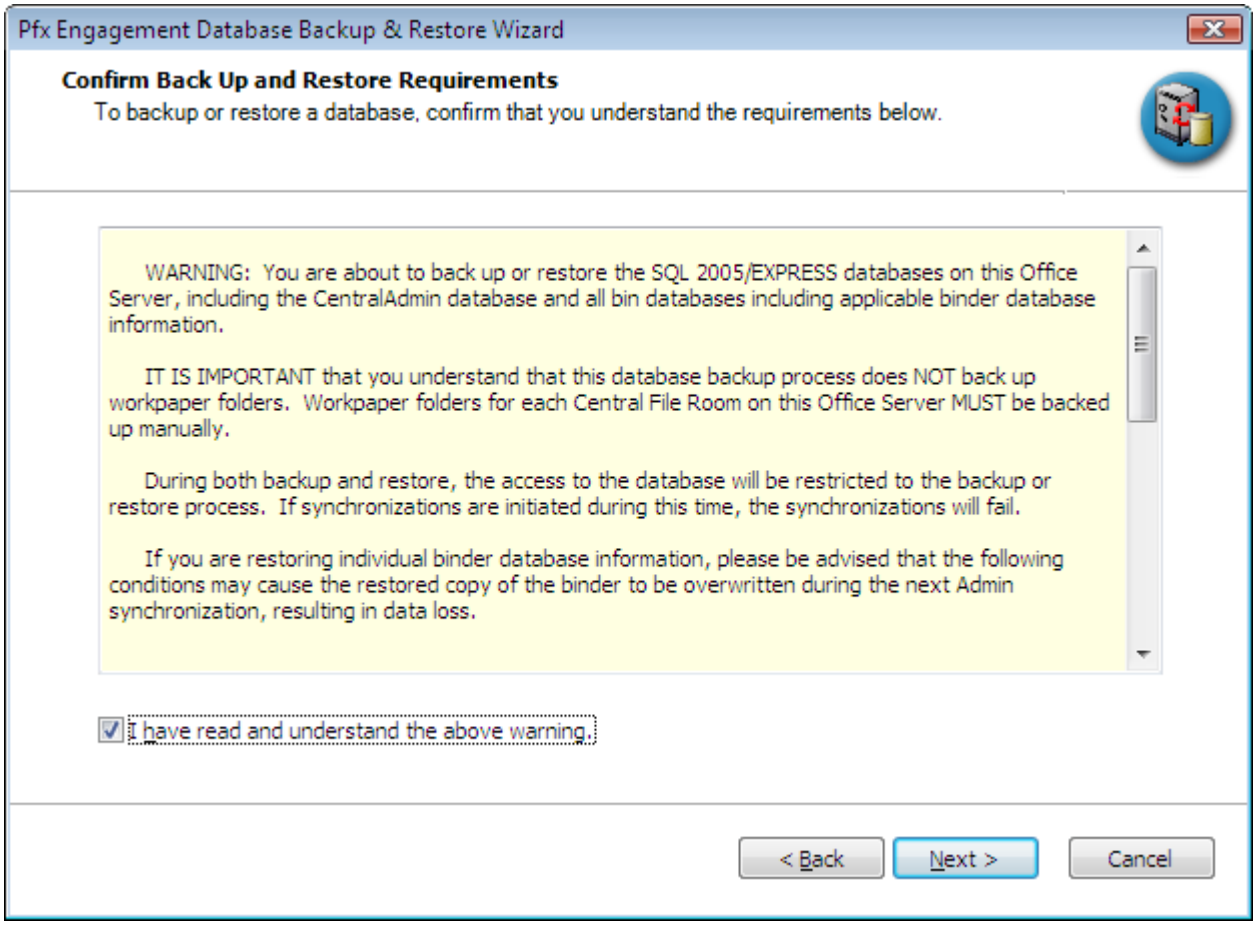
Running the Restore Utility (Restore all Office Server databases)

The following steps will guide you through the Restore process:

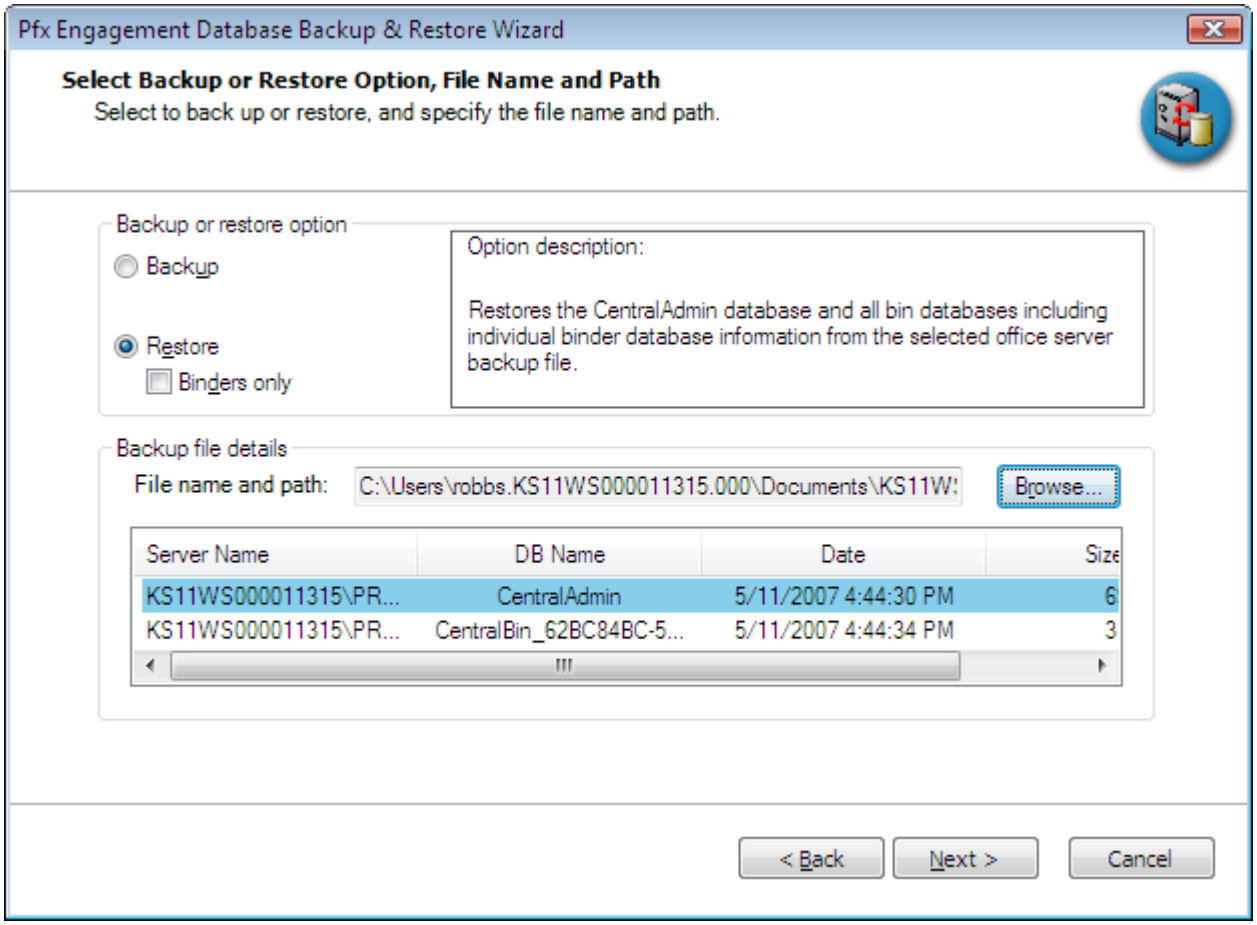
1. Launch the Database Backup & Restore Wizard using one of the following two methods:
   a. Select **Start/Programs/ProSystem fx Engagement/ProSystem fx Engagement Database Backup & Restore Utility**.
   b. In Windows Explorer, double-click on **BackupRestoreUtil.exe**. (The BackupRestoreUtil.exe will be located in the x:\Pfx Engagement\Admin\Utilities\Backup Restore directory.)
2. Select **Next** on the *Welcome page***.**



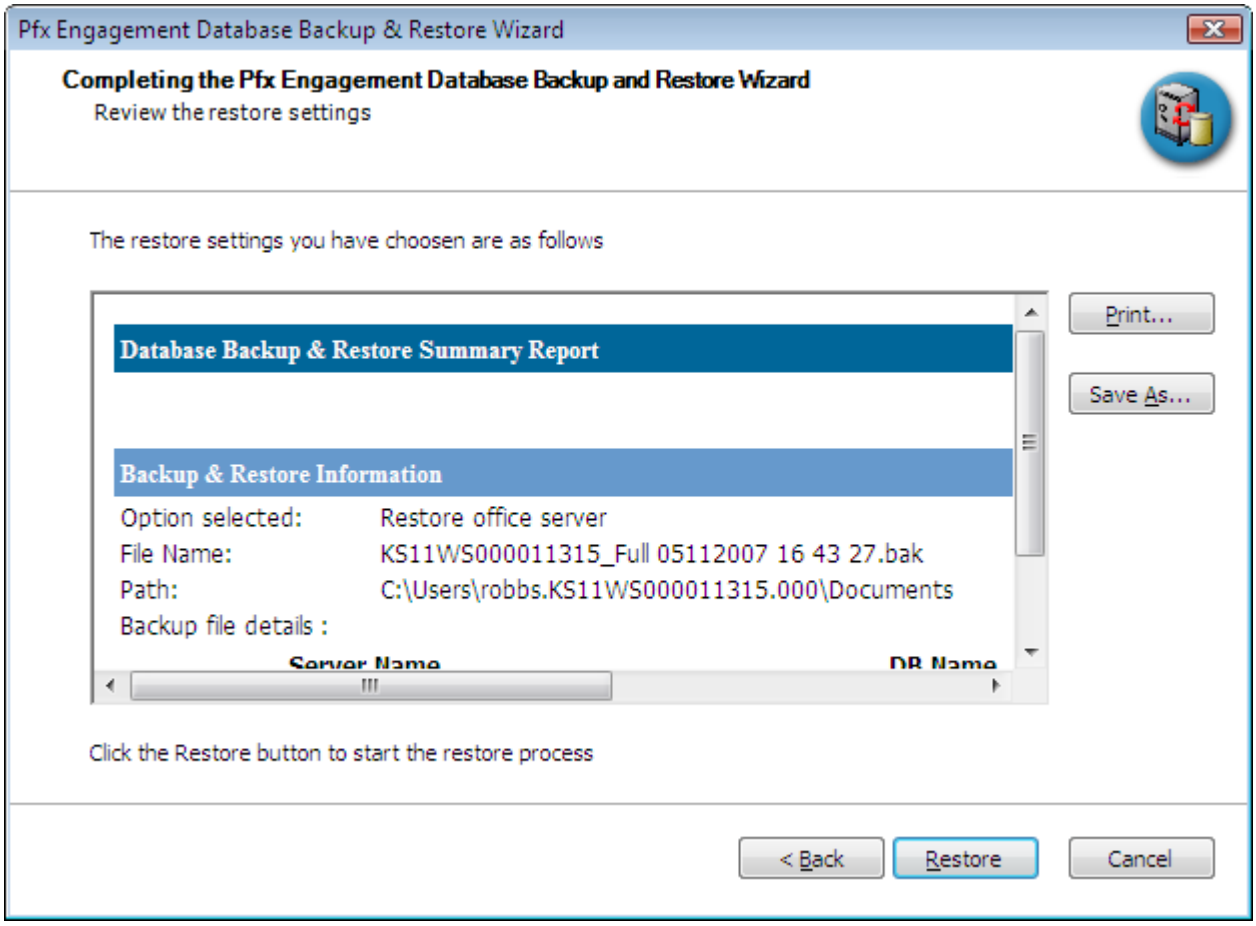
3. After you have read and understand the information regarding restore, check the box and select **Next**.



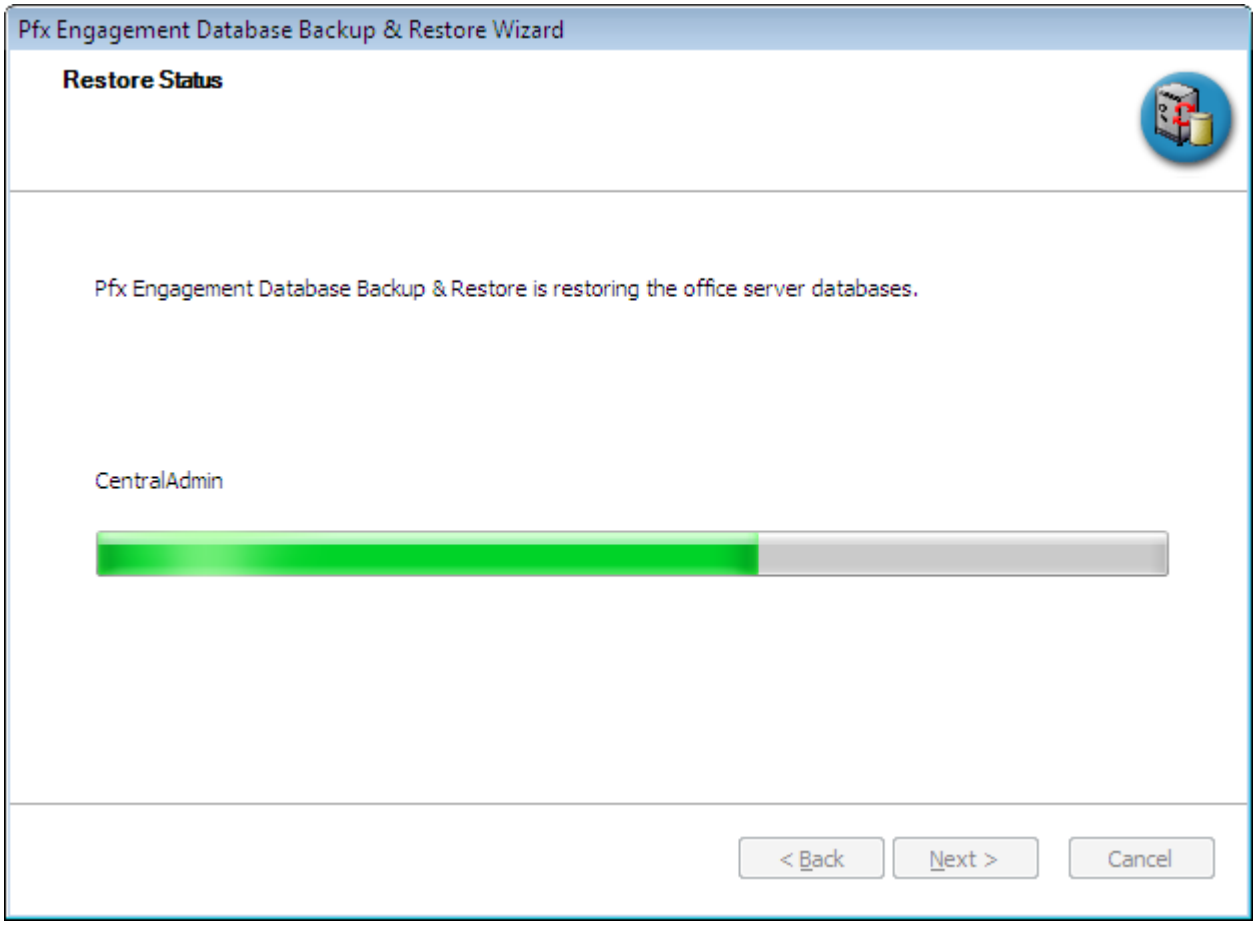
4. Select the **Restore** radio button. Browse for the backup file [.bak] to be restored. The Office Server databases within the selected backup file will display in the list. Select **Next**.



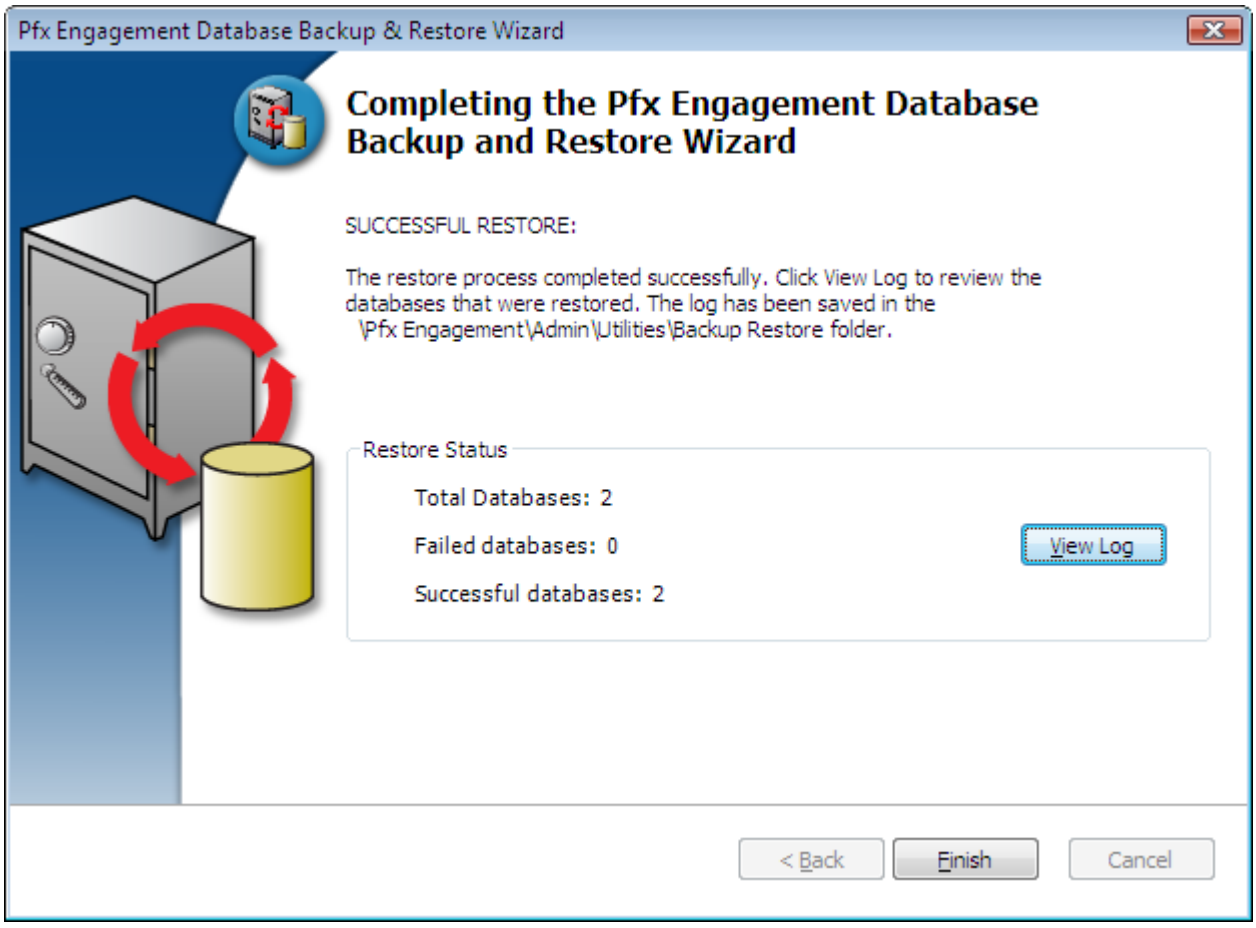
5. Review the restore settings and select the **Restore** button to begin the restore process.



6. A progress indicator page will display to show you the progress of the restore.



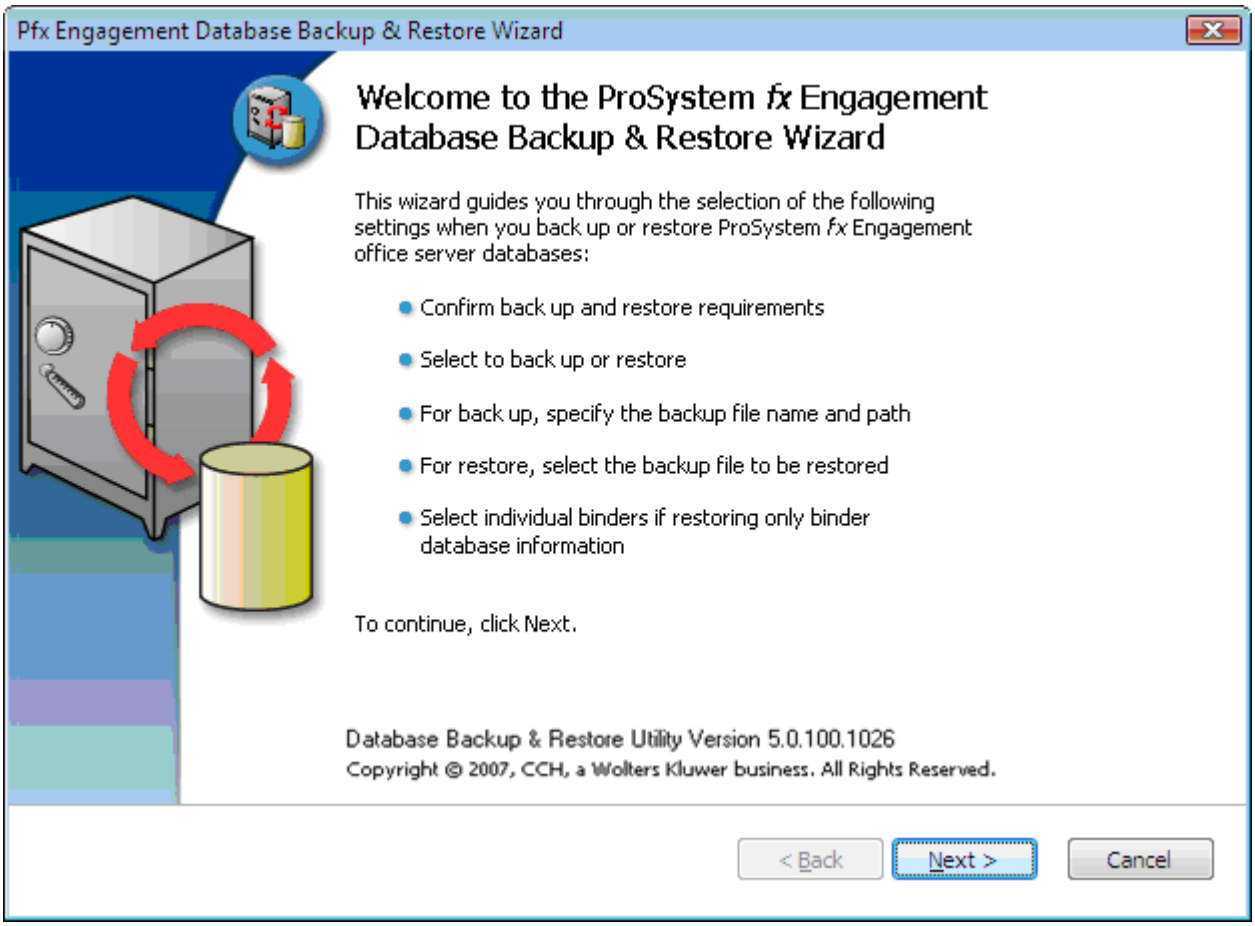
7. Once complete, the *Database Backup & Restore Wizard Complete* page will display the number of databases that were successfully restored and the number that failed to be restored. Select **View Log** to view a log detailing the restore information for each database. Select **Finish** to exit the wizard.



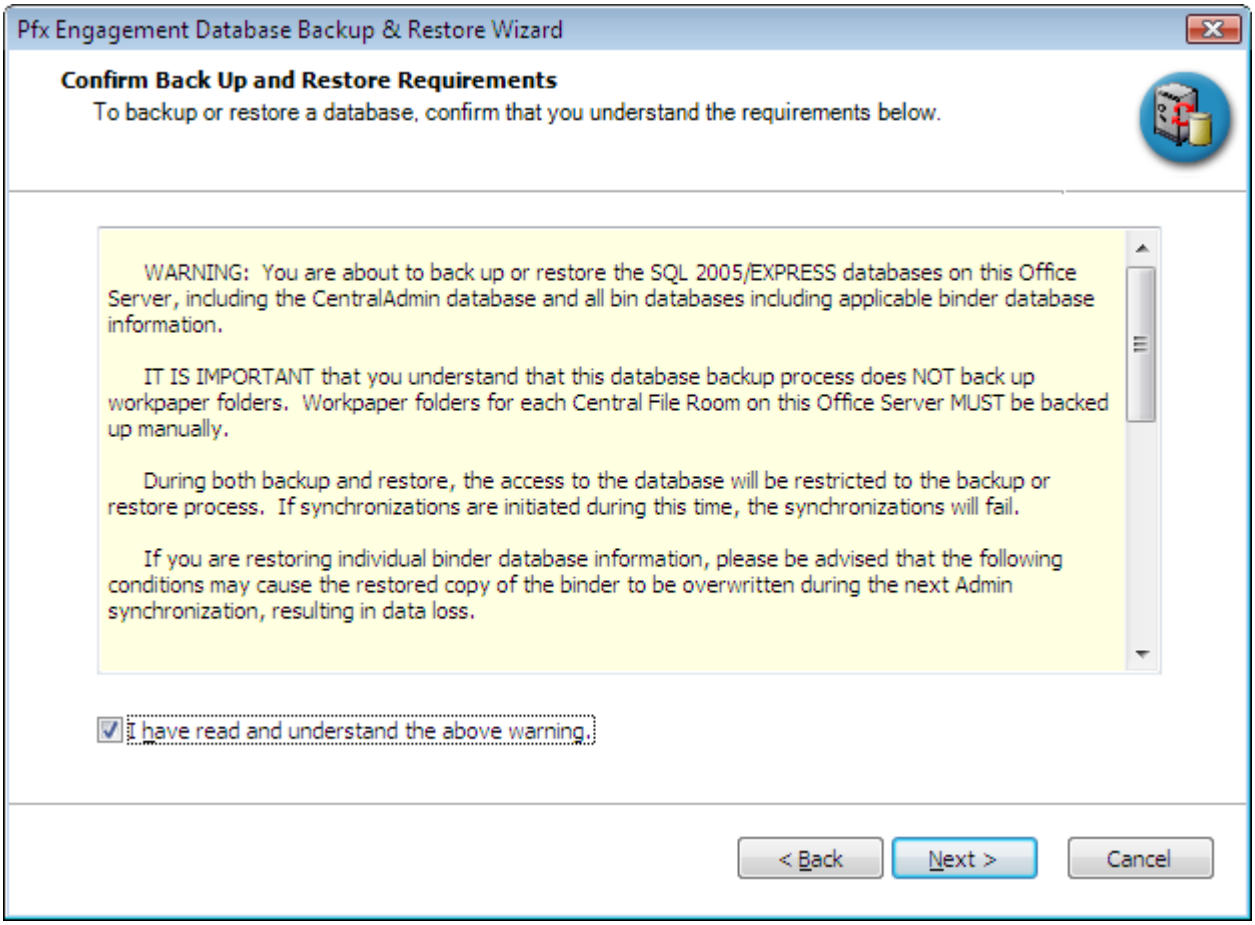
Running the Restore Utility (Restore Individual Binder Database Information)

The following steps will guide you through running the Restore process to restore individual binder database information:

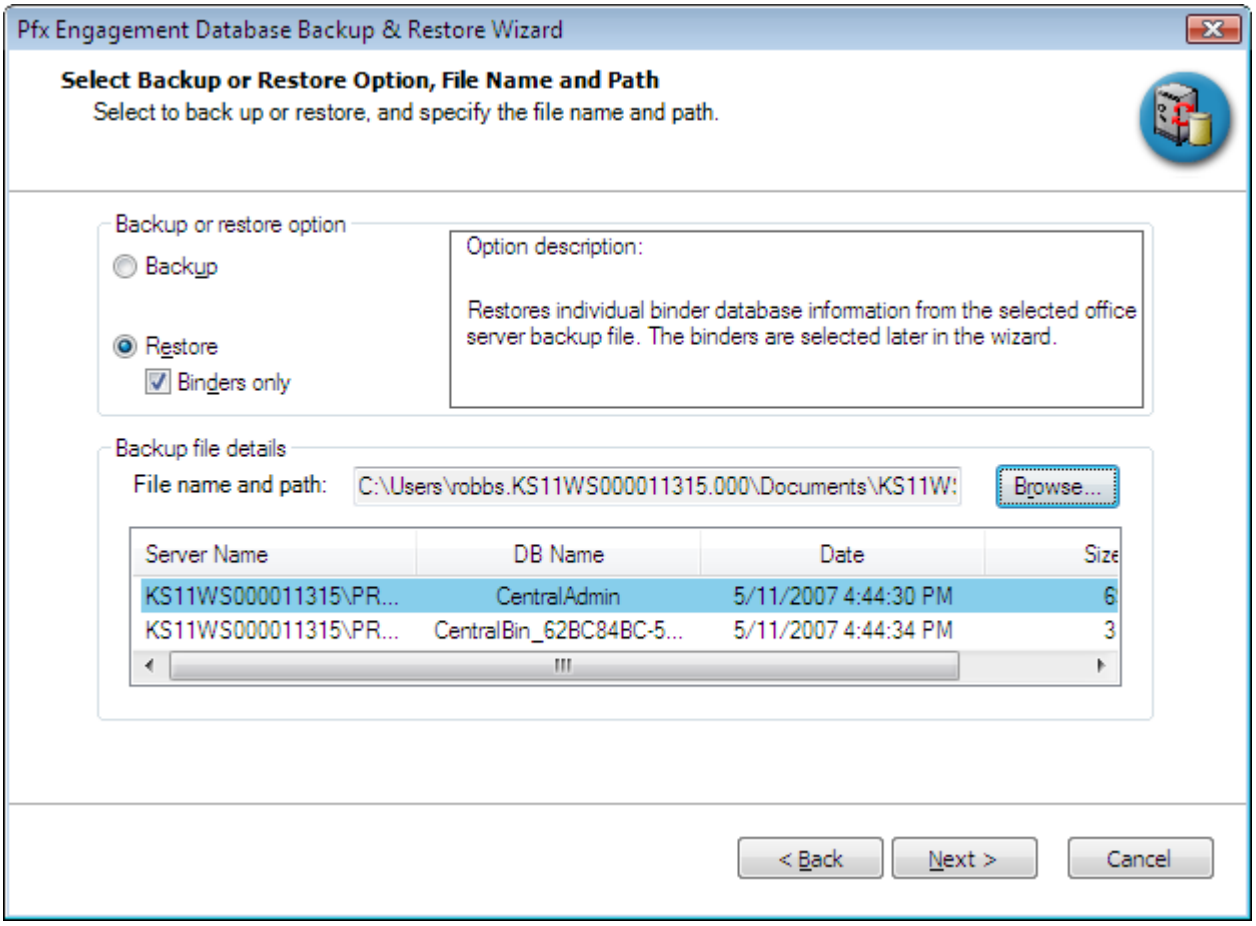
1. Launch the Database Backup & Restore Wizard using one of the following two methods:
    a. Select **Start/Programs/ProSystem fx Engagement/ProSystem fx Engagement Database Backup & Restore Utility**.
    b. In Windows Explorer, double-click on **BackupRestoreUtil.exe**. (The BackupRestoreUtil.exe will be located in the x:\Pfx Engagement\Admin\Utilities\Backup Restore directory.)
2. Select **Next** on the *Welcome* page.



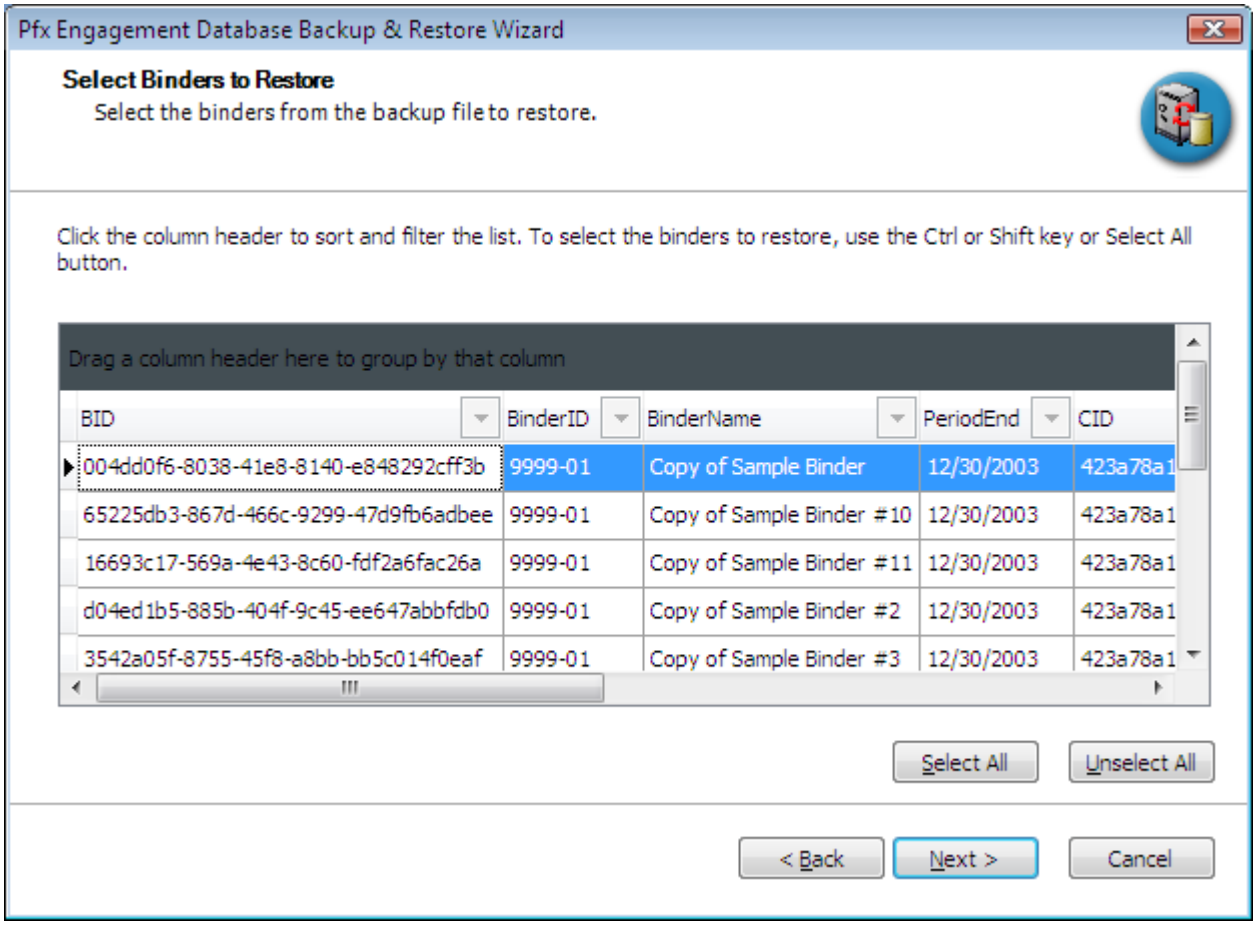
3. After you have read and understand the information regarding restore, check the box and select **Next**.



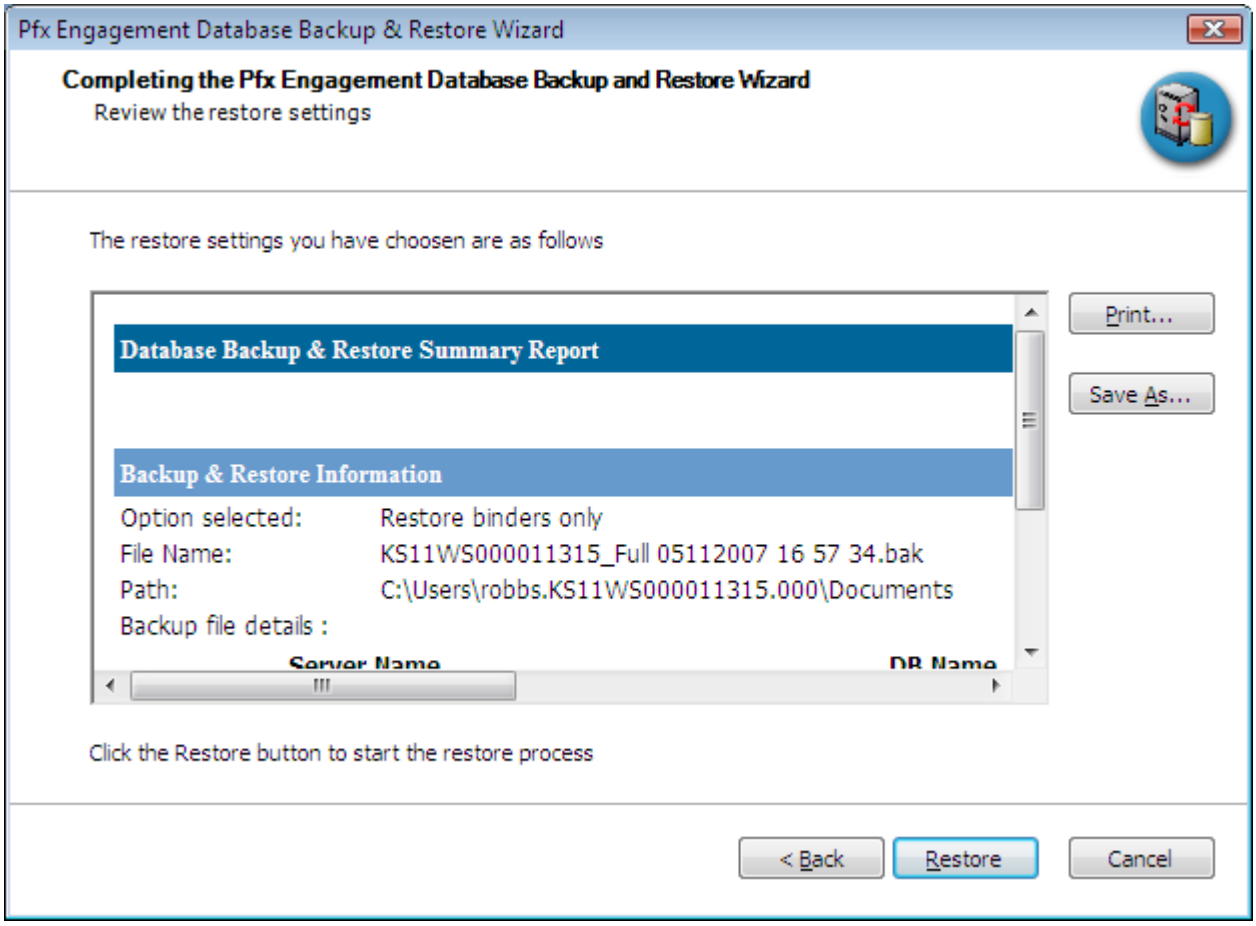
4. Select the **Restore** radio button and the **Binders only** check box. Browse for the backup file [.bak] from which to restore the binder database information. The Office Server databases within the selected backup file will display in the list. Select **Next**.



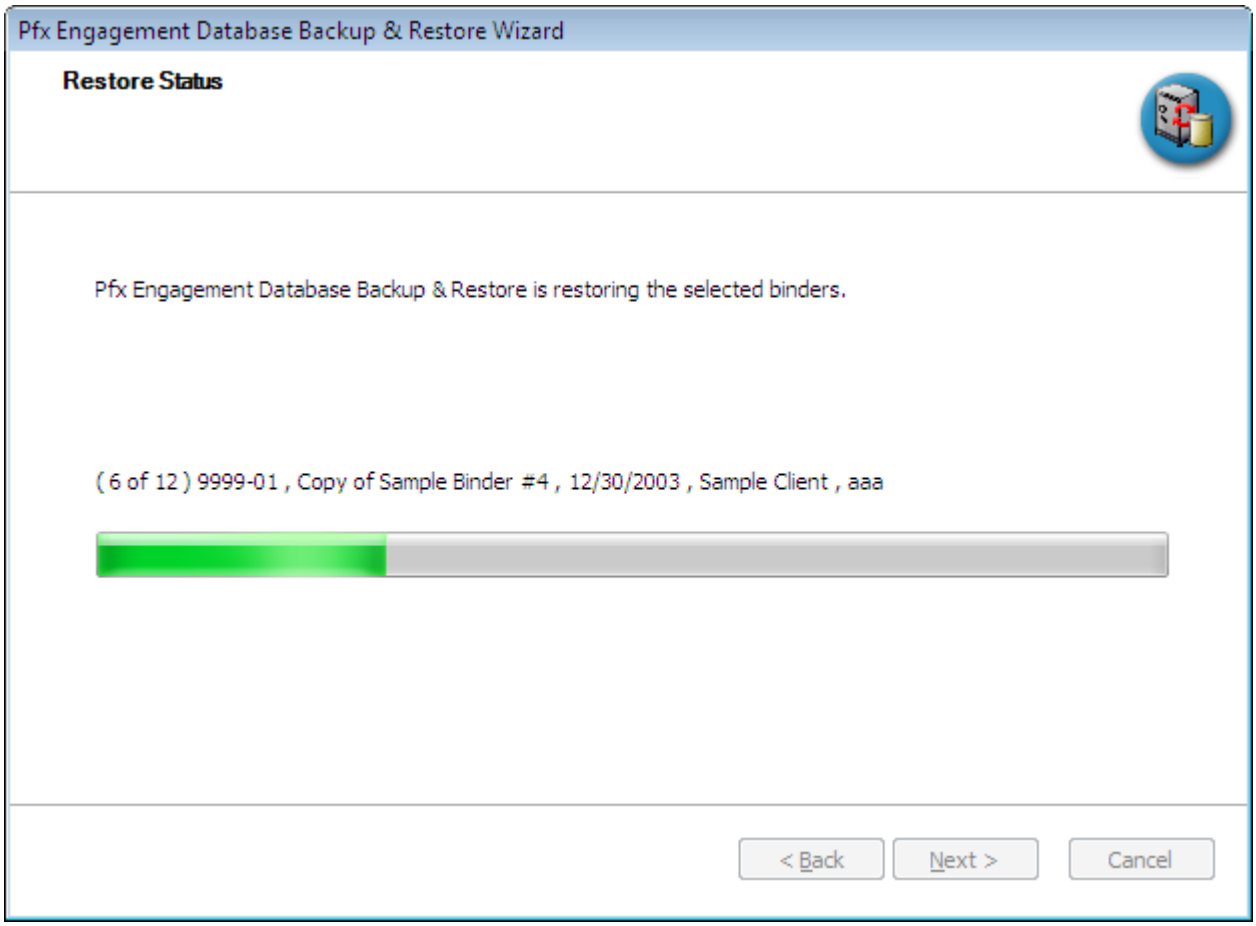
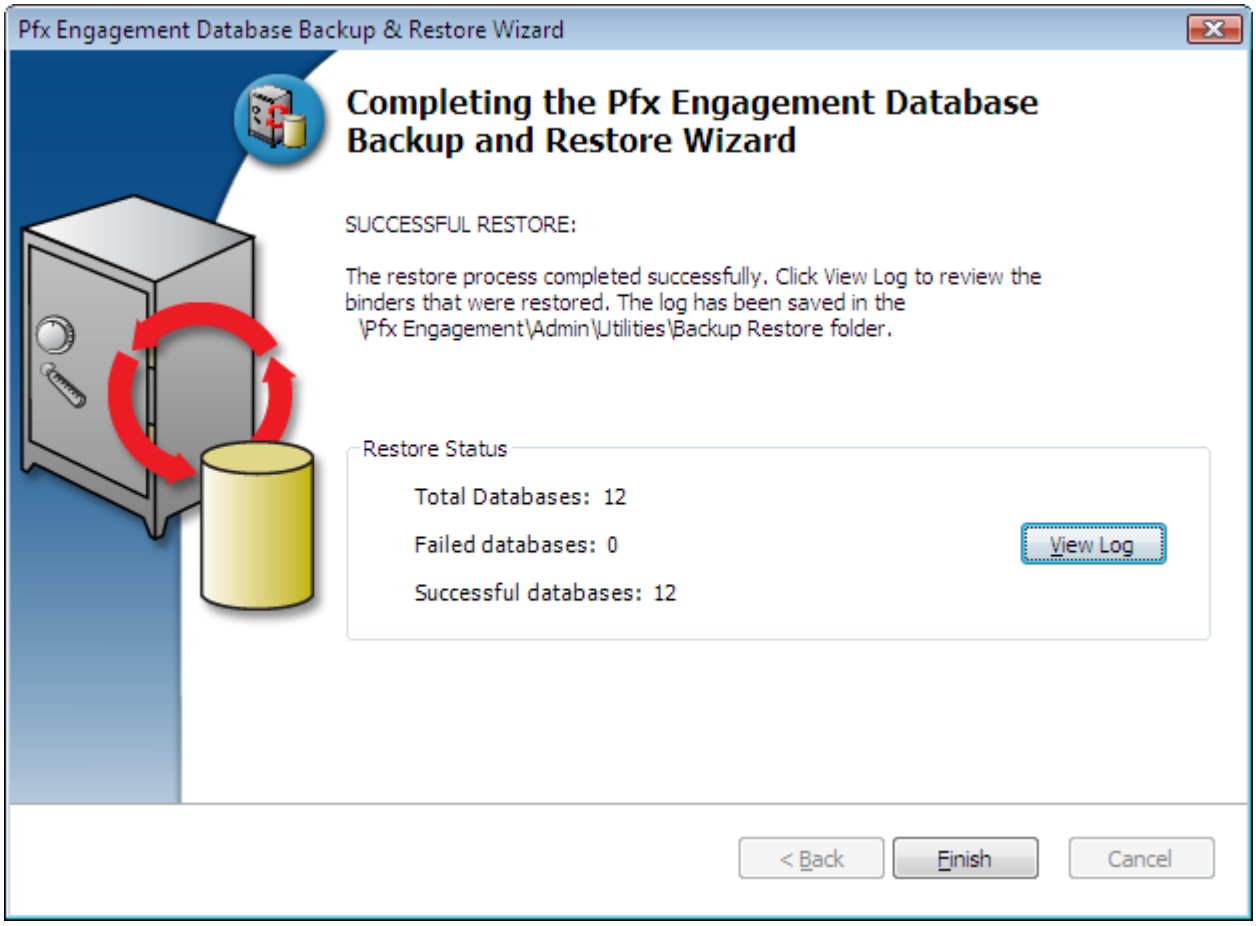
5. Highlight the individual binder to be restored. To select multiple binders to restore, use the Ctrl or Shift key while highlighting the binders or click the **Select All** button. Select **Next**.



6. Review the restore settings and select **Restore** to begin the restore process.



7. A progress indicator page will display to show you the progress of the restore.



8. Once complete, the *Database Backup & Restore Wizard Complete* page will display the number of binders where the database information was successfully restored and the number that failed to be restored. Select **View Log** to view a log detailing the restore information for each binder. Select **Finish** to exit the wizard.