ProSystem *fx*[®] Engagement

Database Backup and Restore Instructions
<u>Version 5.7</u>
Instructions

Fall 2008



Table of Contents

Overview	3
Removing Prior Versions of the Utility	3
Backup Considerations	3
Running the Backup Utility (with User Interface)	5
Running the Backup Utility (using Scheduler)	11
Restore Considerations	13
Running the Restore Utility (Restore all Office Server databases)	14
Running the Restore Utility (Restore Individual Binder Database Information)	20

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.
 - 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.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Welcome to the ProSystem <i>fx</i> Engagement Database Backup & Restore Wizard	
	This wizard guides you through the selection of the following settings when you back up or restore ProSystem <i>fx</i> Engagement office server databases:	
	Confirm back up and restore requirements	
	Select to back up or restore	
	For back up, specify the backup file name and path	
	For restore, select the backup file to be restored	
	 Select individual binders if restoring only binder database information 	
	To continue, click Next.	
	Database Backup & Restore Utility Version 5.0.100.1026 Copyright © 2007, CCH, a Wolters Kluwer business. All Rights Reserved.	
	< <u>Back</u> Next > Cance	:

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

iga ion T	Ifirm Back Up and Restore Requirements To backup or restore a database, confirm that you understand the requirements below.	<u>e</u>
	WARNING: You are about to back up or restore the SQL 2005/EXPRESS databases on this Office Server, including the CentralAdmin database and all bin databases including applicable binder database information. IT IS IMPORTANT that you understand that this database backup process does NOT back up workpaper folders. Workpaper folders for each Central File Room on this Office Server MUST be backed up manually. During both backup and restore, the access to the database will be restricted to the backup or restore process. If synchronizations are initiated during this time, the synchronizations will fail. If you are restoring individual binder database information, please be advised that the following conditions may cause the restored copy of the binder to be overwritten during the next Admin synchronization, resulting in data loss.	
[✓ I have read and understand the above warning.	
	< <u>B</u> ack <u>N</u> ext >	Cancel

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**.

Pfx Engagement Database Backup	e & Restore Wizard	
Select Backup or Restore Option Select to back up or restore, and a	a, File Name and Path specify the file name and path.	B
Backup or restore option Backup Restore Binders only Backup file details File name and path:	Option description: FULL back up of the office server CentralAdmin database and all bin databases including individual binder database information. Browse	
	< <u>Back</u> <u>N</u> ext > C	ancel

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

Review the backup set	agement Database Backup and Restore Wizard ings	
The backup settings you	have choosen are as follows	
Database Backup &	Restore Summary Report	• <u>P</u> rint
		Save <u>A</u> s
Backup & Restore I	nformation	
Option selected: File Name: Path:	Full backup KS11WS000011315_Full 05112007 16 43 27.bak C:\Users\robbs.KS11WS000011315.000\Documents	
•	, •	T
Click the Back Up button	to start the backup process	

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

fx Engagement Database Backup & Restore Wizard	
Backup Status	
Pfx Engagement Database Backup & Restore is backir	ng up (full) the office server databases and binders.
CentralAdmin	
	< <u>B</u> ack <u>N</u> ext > Cancel

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.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Completing the Pfx Engagement Database Backup and Restore Wizard	
	SUCCESSFUL BACKUP:	
	The backup process completed successfully. Click View Log to review the databases that were backed up. The log has been saved in the \Pfx Engagement\Admin\Utilities\Backup Restore folder.	
	Backup Status	
	Total Databases: 2	
v	Failed databases: 0 <u>View Log</u>	
	Successful databases: 2	
	< <u>B</u> ack <u>Finish</u> Cancel	

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.

Scheduled Task Wiza	ď	X
2	This wizard helps you schedule a task for Windows to perform. You select the program you want Windows to run, and then schedule it for a convenient time. Click Next to continue.	
	< <u>B</u> ack <u>Next</u> > Cance	9

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

Scheduled Task Wizard	I	
	Click the program you want Windows To see more programs, click Browse	s to run.
1	Application	Version 🔼
Y1	RABBYY FineReader 5.0 Sprint	5.0.0.498 (pri
	🖄 Acrobat Reader 5.1	5.1.0.200209
	🜱 Activate Product	
Same 1	ActiveX Control Test Container	6.0.8063
	Add New Client	3, 3, 7, 0
	💟 Address Book	6.00.2900.21 🧹
		Browse
	< <u>B</u> ack <u>N</u> ext >	Cancel

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

BackupRestore	Util 🦳 🔀
Task Schedul	e Settings Security
C:\WI	NDOWS\Tasks\BackupRestoreUtil.job
<u>R</u> un:	Backup Restore\BackupRestoreUtil.exe'' /f ''c:\backup'
	Browse
S <u>t</u> art in:	"D:\Pfx Engagement\ADMIN\Utilities\Backup Restore\B
<u>C</u> omments:	
R <u>u</u> n as:	Set password
Run only if Jo	ogged on
✓ Enabled (sch	neduled task runs at specified time)
	OK Cancel <u>A</u> pply

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

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.
 - 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*.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Welcome to the ProSystem <i>fx</i> Engagement Database Backup & Restore Wizard	
	This wizard guides you through the selection of the following settings when you back up or restore ProSystem <i>fx</i> Engagement office server databases:	
	Confirm back up and restore requirements	
	Select to back up or restore	
	For back up, specify the backup file name and path	
	For restore, select the backup file to be restored	
	Select individual binders if restoring only binder database information	
	To continue, click Next.	
	Database Backup & Restore Utility Version 5.0.100.1026 Copyright © 2007, CCH, a Wolters Kluwer business. All Rights Reserved.	
	< <u>B</u> ack <u>Next</u> > Cance	I

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

ngag C onfi To	gement Database Backup & Restore Wizard irm Back Up and Restore Requirements b backup or restore a database, confirm that you understand the requirements below.	
s ii v u u r	WARNING: You are about to back up or restore the SQL 2005/EXPRESS databases on this Office Server, including the CentralAdmin database and all bin databases including applicable binder database information. IT IS IMPORTANT that you understand that this database backup process does NOT back up workpaper folders. Workpaper folders for each Central File Room on this Office Server MUST be backed up manually. During both backup and restore, the access to the database will be restricted to the backup or restore process. If synchronizations are initiated during this time, the synchronizations will fail. If you are restoring individual binder database information, please be advised that the following conditions may cause the restored copy of the binder to be overwritten during the next Admin synchronization, resulting in data loss.	
v	I have read and understand the above warning.	
	< <u>B</u> ack <u>N</u> ext > C	Cancel

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**.

Backup or restore option Backup	Option des	scription:		
Restore Binders only	Restores t individual backup file	he CentralAdmin binder database e.	database and all bin databas information from the selected	es including office server
Backup file details File name and path:	C:\Users\robbs.KS11	WS000011315.0	000\Documents\KS11W:	Browse
Server Name	DB N	ame	Date	Size
KS11WS000011315\	PR Central	Admin	5/11/2007 4:44:30 PM	6
KS11WS000011315\	PR CentralBin_62	2BC84BC-5	5/11/2007 4:44:34 PM	3
•	1	11		- F

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

Review the restore settin	igs		a a a a a a a a a a a a a a a a a a a
The restore settings you h	ave choosen are as follows		
			Print
Database Backup & F	Restore Summary Report		
			Save <u>A</u> s
		Ξ	
Backup & Restore In	formation		
Option selected:	Restore office server		
File Name:	KS11WS000011315_Full 05112007 16 43 27.bak		
Path:	C:\Users\robbs.KS11WS000011315.000\Documents		
Backup file details :		-	
< Sorv	III DR Nama		
Click the Restore button to	o start the restore process		

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

Pfx Engagement Database Backup & Restore Wizard	
Restore Status	
Pfx Engagement Database Backup & Restore is restoring the off	ice server databases.
CentralAdmin	
	< <u>B</u> ack <u>N</u> ext > Cancel

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.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Completing the Pfx Engagement Database Backup and Restore Wizard	
	SUCCESSFUL RESTORE:	
	The restore process completed successfully. Click View Log to review the databases that were restored. The log has been saved in the \Pfx Engagement\Admin\Utilities\Backup Restore folder.	
	Restore Status	
	Total Databases: 2	
Ψ	Failed databases: 0	
	Successful databases: 2	
	< <u>B</u> ack <u>E</u> inish Cancel	

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.
 - 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.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Welcome to the ProSystem <i>fx</i> Engagement Database Backup & Restore Wizard	
	This wizard guides you through the selection of the following settings when you back up or restore ProSystem <i>fx</i> Engagement office server databases:	
	Confirm back up and restore requirements	
	Select to back up or restore	
	For back up, specify the backup file name and path	
	For restore, select the backup file to be restored	
	Select individual binders if restoring only binder database information	
	To continue, click Next.	
	Database Backup & Restore Utility Version 5.0.100.1026 Copyright © 2007, CCH, a Wolters Kluwer business. All Rights Reserved.	
	< <u>Back</u> Cance	!

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

Pfx Engagement Database Backup & Restore Wizard	-
Confirm Back Up and Restore Requirements To backup or restore a database, confirm that you understand the requirements below.	B
WARNING: You are about to back up or restore the SQL 2005/EXPRESS databases on this Office Server, including the CentralAdmin database and all bin databases including applicable binder database information. IT IS IMPORTANT that you understand that this database backup process does NOT back up workpaper folders. Workpaper folders for each Central File Room on this Office Server MUST be backed up manually. During both backup and restore, the access to the database will be restricted to the backup or restore process. If synchronizations are initiated during this time, the synchronizations will fail. If you are restoring individual binder database information, please be advised that the following conditions may cause the restored copy of the binder to be overwritten during the next Admin synchronization, resulting in data loss.	
✓ I have read and understand the above warning.	
< <u>Back</u> <u>N</u> ext >	Cancel

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**.

Backup or restore option	Option description:		
Restore Image: Binders only	Restores individual binder server backup file. The bi	r database information from the s inders are selected later in the w	selected offic vizard.
Backup file details File name and path: C:\Us Server Name	ers\robbs.KS11WS000011315 DB Name	5.000\Documents\KS11W; Date	Browse Size
KS11WS000011315\PR	CentralAdmin	5/11/2007 4:44:30 PM	6
		E/11/2007 A-AA-2A DM	2
KS11WS000011315\PR	CentralBin_62BC84BC-5	3/11/2007 4.44.34 PM	5

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**.

Select Binders to Res Select the binders f	tore rom the backup file to	o restore.			282
Click the column header button.	to sort and filter the lis	st. To select	the binders to restore, us	e the Ctrl or Shi	ift key or Select
Drag a column header ł	nere to group by that	column			
BID	-	BinderID	BinderName	- PeriodEnd	I 🔽 CID
004dd0f6-8038-41e8	8140-e848292cff3b	9999-01	Copy of Sample Binder	12/30/20	03 423a78a
65225db3-867d-466c	-9299-47d9fb6adbee	9999-01	Copy of Sample Binder	#10 12/30/20	03 423a78a
16693c17-569a-4e43	-8c60-fdf2a6fac26a	9999-01	Copy of Sample Binder	#11 12/30/20	03 423a78a
d04ed1b5-885b-404f	9c45-ee647abbfdb0	9999-01	Copy of Sample Binder	#2 12/30/20	03 423a78a
3542a05f-8755-45f8-	a8bb-bb5c014f0eaf	9999-01	Copy of Sample Binder	#3 12/30/20	03 423a78a
•					•
				Select All	<u>U</u> nselect

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

The restore settings you h	ave choosen are as follows		
me restore settings you n			Print
Database Backup & R	Restore Summary Report		
		=	Save <u>A</u> s
Backup & Restore Inf	formation		
Option selected: File Name: Path:	Restore binders only KS11WS000011315_Full 05112007 16 57 34.bak C:\Users\robbs.KS11WS000011315.000\Documents		
Backup file details :	or Nama	-	
<			
Click the Restore button to	start the restore process		

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

Pfx Engagement Database Backup & Restore Wizard	
Restore Status	
Pfx Engagement Database Backup & Restore is restoring the	selected binders.
(6 of 12) 9999-01 , Copy of Sample Binder #4 , 12/30/2003	; , Sample Client , aaa
	< <u>B</u> ack <u>N</u> ext > Cancel

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.

Pfx Engagement Database Bac	kup & Restore Wizard	×
B	Completing the Pfx Engagement Database Backup and Restore Wizard	
	SUCCESSFUL RESTORE: The restore process completed successfully. Click View Log to review the binders that were restored. The log has been saved in the \Pfx Engagement\Admin\Utilities\Backup Restore folder.	
	Restore Status Total Databases: 12 Failed databases: 0 Successful databases: 12	
	< <u>B</u> ack <u>Finish</u> Cance	