Backing Up ProSystem *fx* Practice Management

December 2011

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Chapter 1

SQL Management Studio Express

Preparing the SQL Server Database

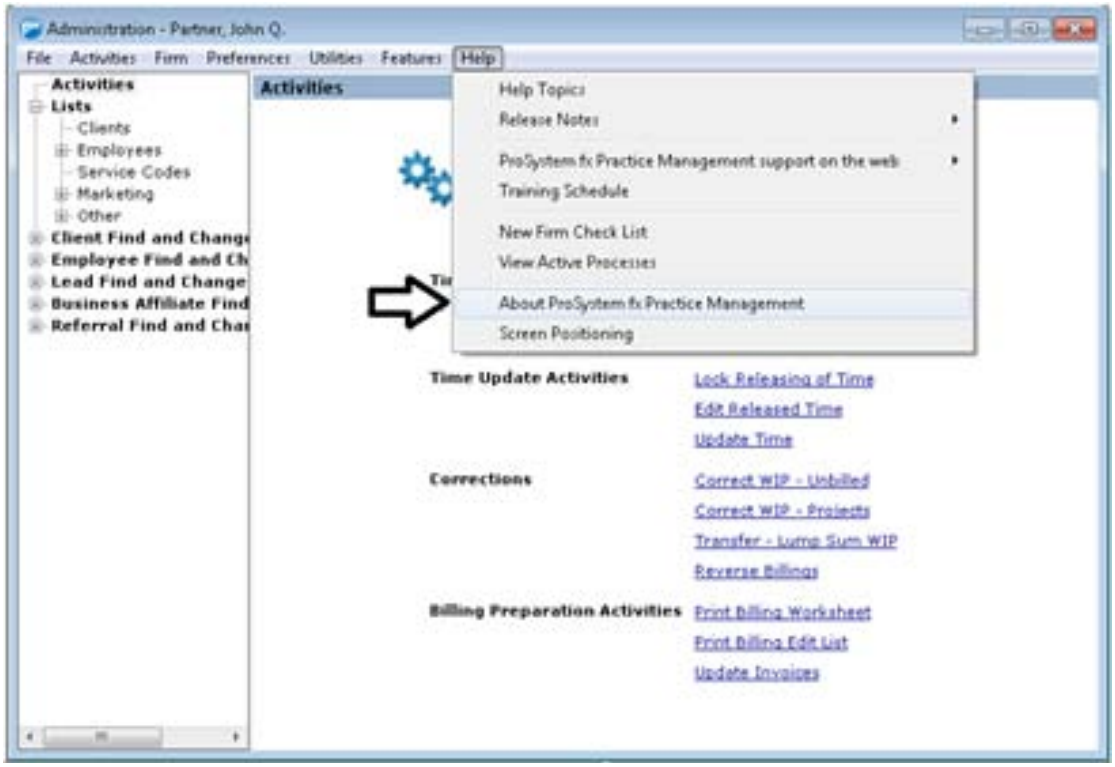
There are several steps to set up a scheduled backup. You must perform these steps at the server hosting the SQL database.

Before starting this procedure there are a number of items to prepare. Complete these steps before moving on as they will be used later.

Find the SQL Server and Database Names

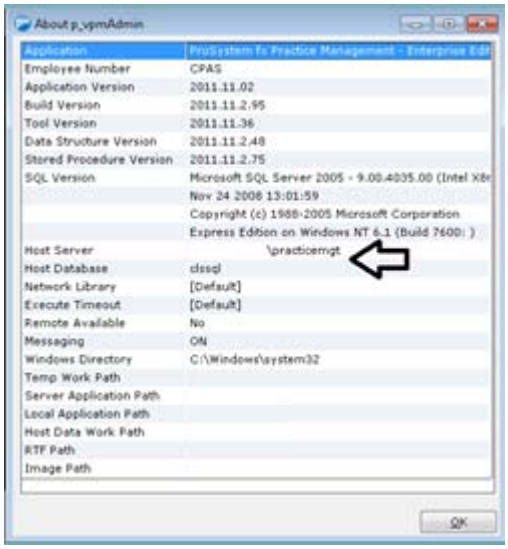
This information is easily available from inside the Practice Management software.

1. Go **Help > About ProSystem *fx* Practice Management**.



2. Click **Additional Info...** on the *About ProSystem fx Practice Management* dialog.

3. Write down the **Host Server** and **Host Database** from the *About* dialog. If there is more than one database in use, perform this step for each database.



4. Create a folder on a local drive of the server hosting the Practice Management SQL Server to store the Backup file and the files created in this document.

5. Decide on a time to perform the backup. Schedule the backup when no staff are logged in to the Practice Management software.

   Note: The backup may be included as a part of a subsequent separate backup, if needed.

6. Locate the 'sa' account password in the SQL Administrator account. If no changes have been made to the default information, the password is PracticeUser1.

Download and Install SQL Management Studio Express

SQL Management Studio Express is a free download from the Microsoft Web site. Follow these instructions to download and install SQL Management Studio Express on your server.

Download SQL Management Express:

1. Go to http://www.microsoft.com
2. Select **Downloads > Download Center.**
3. Enter **Management Studio** in the search box to find a list of available downloads. One of the first results will be *Microsoft® SQL Server® 2008 Management Studio Express*. If preferred, *Microsoft® SQL Server® 2005 Management Studio Express* is also compatible with ProSystem *fx* Practice Management.
4. Select **Microsoft® SQL Server® 2008 Management Studio Express** and read the Overview and Instructions.

   Note: The ProSystem *fx* Practice Management installation also installs SQL Server and .NET Framework 2.0 to the Server.
5. Download this tool to the Server

Install SQL Management Express:

Once the tool is downloaded, you are ready to install.

1. Click **Run**. A wizard displays walking you through the installation process.
2. Accept the license agreement and follow the instructions to install SQL Server Management Studio Express on your server.

   Note: It does not need to be installed on a workstation also.

Chapter 2

BACKING UP PROSYSTEM *FX* MANAGEMENT

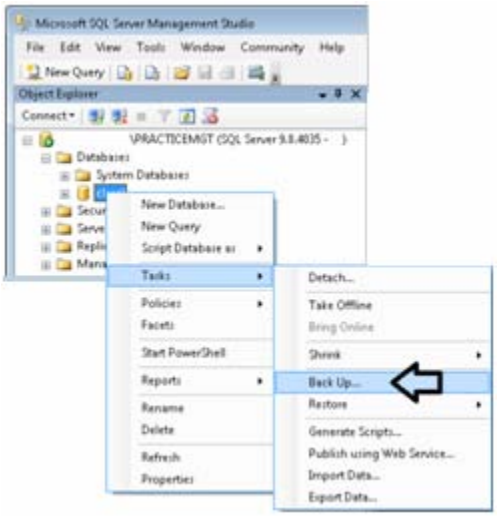
Creating a Back Up Script with Management Studio

Follow these instructions to make a single backup. You will create a script file that will then be used to make the scheduled backup. If more than one database needs to be backed up, you must repeat these steps for each database, and create a separate script file each time.

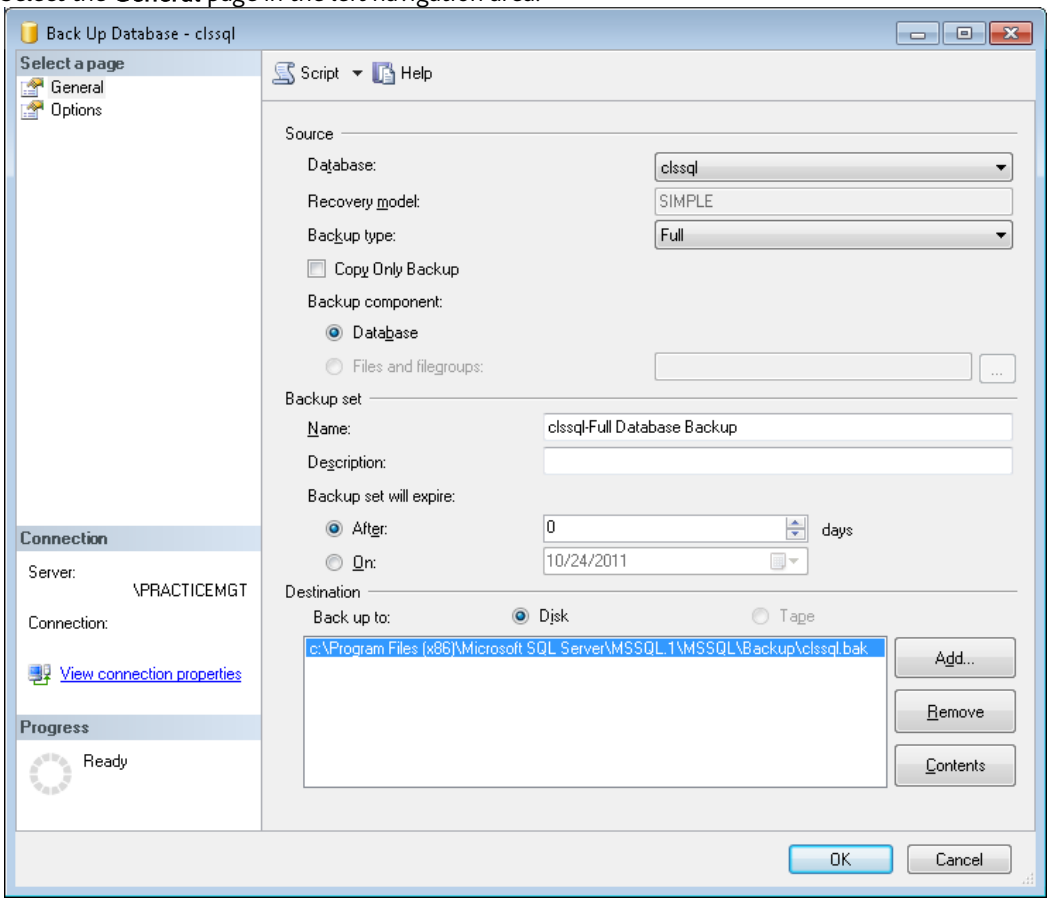
1. Select **Start > Programs > Microsoft SQL Server 2005 or 2008 > Server Management Studio Express**. The *Connect to Server* dialog displays.

2. Select the Host server from the drop-down list. If it is not in the list, enter the information in the Server name field.
3. Select SQL Server Authentication in the **Authentication** field and enter the SQL Administrator account (sa) user name and password.
4. Click **Connect**.
5. Click **Databases** in the Object Explorer dialog to expand the list of available SQL databases.

6. Right-click your firm's ProSystem *fx* Practice Management SQL database and select **Tasks > Back Up**. The *Back Up Database* dialog displays.



7. Select the **General** page in the left navigation area.



   a. Verify the Database name in the **Name** field. The ProSystem *fx* Practice Management SQL database selected in the previous step is selected by default.

      Note: Master, Model, Tempdb, and MSDB are also listed as databases to backup. These four databases are system databases and should not be backed up for this procedure.

b. Enter a description of the backup in the **Description** box, if preferred.

c. Verify that the default value of 0 is specified in the **Backup set will expire > After** box.

d. Select **Disk** in the Destination section.

   Note: The destination box may already list a file in the Back up to box. If so, click **Remove** to delete the path listed.

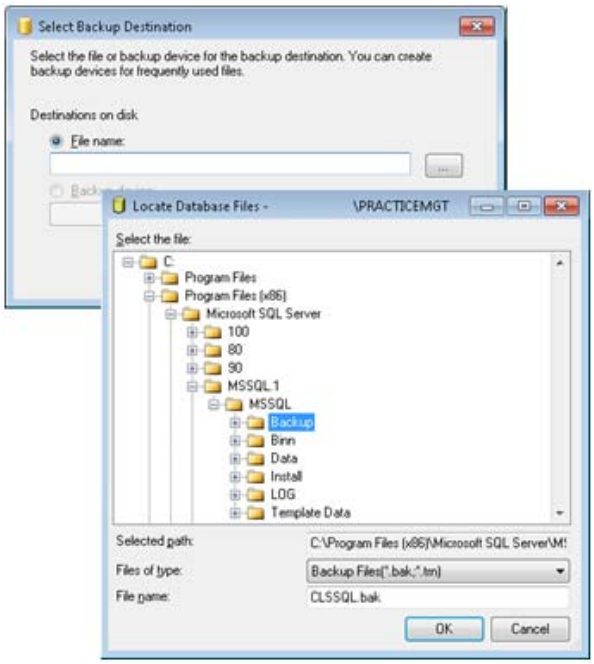
e. Click **Add** to add the correct path. The *Select Backup Destination* dialog will open.

   i. Click the **...** browse button to open a folder tree. .

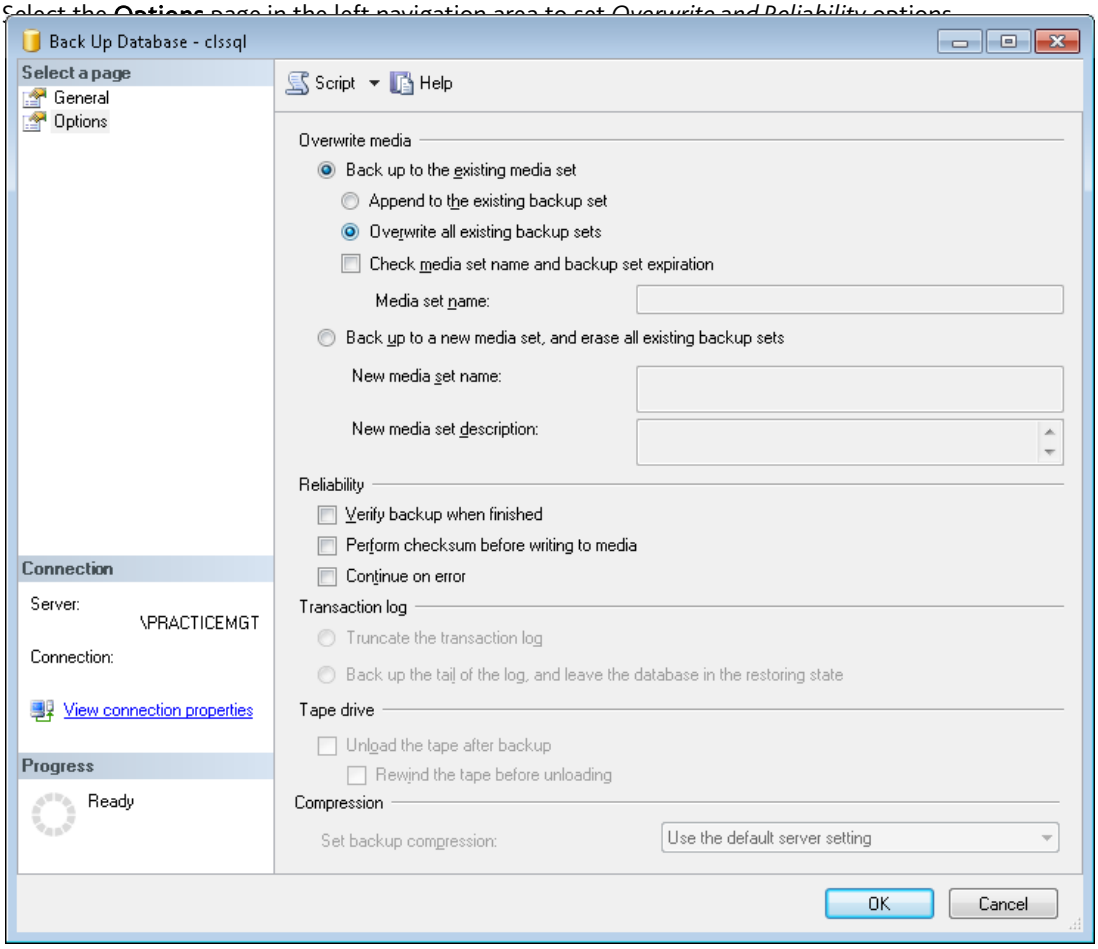
   ii. Browse to the folder created for the backup and enter the name of the file in the File name field.

   iii. Add .BAK to the end of the file name.

   iv. Click **OK** to close the window and click **OK** on the Select Backup Destination window. The path and file name will now be listed in the Destination grid.



8. Select the **Options** page in the left navigation area to set *Overwrite and Reliability* options.

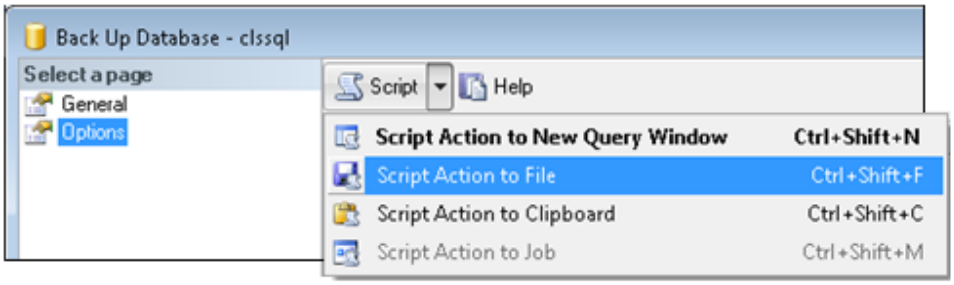


   a. Select **Back up to the existing media set** and **Overwrite all existing backup sets**.

   b. Select **Verify the backup when it is finished** to make sure your backup will be available should you need to restore it. This option may make the backup process significantly longer.

Note: If a test run is wanted, click **OK**. The backup will run, but the script file will not be created. If test is run, steps 6 through 8 must be repeated.

9. Select **Script > Script Action to File** to save your backup instructions to a Script so you can select the script to run the backup in the future.



10. Browse to the location of the backup file.

11. Enter the name of your backup script and click **Save**. Your script will be saved with a .SQL file extension. Repeat this process for each database requiring a backup, with a different name for each script.

Running a Back Up Script with a Batch File

This script file will run the batch file you created in the previous section. Multiple databases can be backed up by adding the command to the batch file for each script file.

1. Open Notepad.
2. Enter the following command:

   SQLCMD.EXE -S*YourServer\Instance* **-Usa -P***password* **-i** *"path\script.sql"*

   - *YourServer\Instance* is the host server found earlier.
   - *Password* is the sa password
   - *"path\script.sql"* is the path to the script file plus the script file's name. Make sure to have quotes before and after this item.

   Note: The command is case sensitive and the "–S", "-U" and "-P" must be upper case while the "-i" and "sa" are lowercase.
3. Test the command.
   a. Click **Start > Programs > Accessories > Command Prompt**.
   b. Copy the command from the text file and paste it in the command prompt window.
   c. Press the **Enter** key to test for errors.

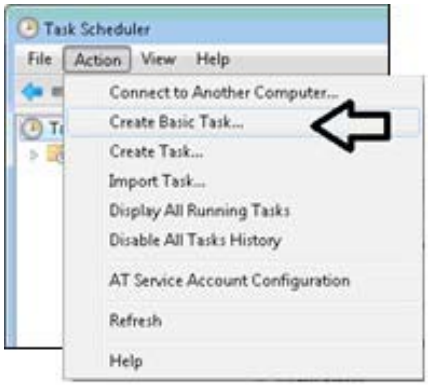
      If the prompt does not run correctly, review and correct the command text in your text file.
4. Select **File > Save As**.
5. Browse to the folder you wish to save the batch file.
6. Enter the name of the batch file with the file extension **.bat**.
7. Click **Save**.

   Note: To run the batck file, double-click the file in Windows Explorer. A dialog opens with a black background, showing numbers counting to one hundred by tens. The Windows folder option **Hide extensions for known file types** must be disabled to view the file.

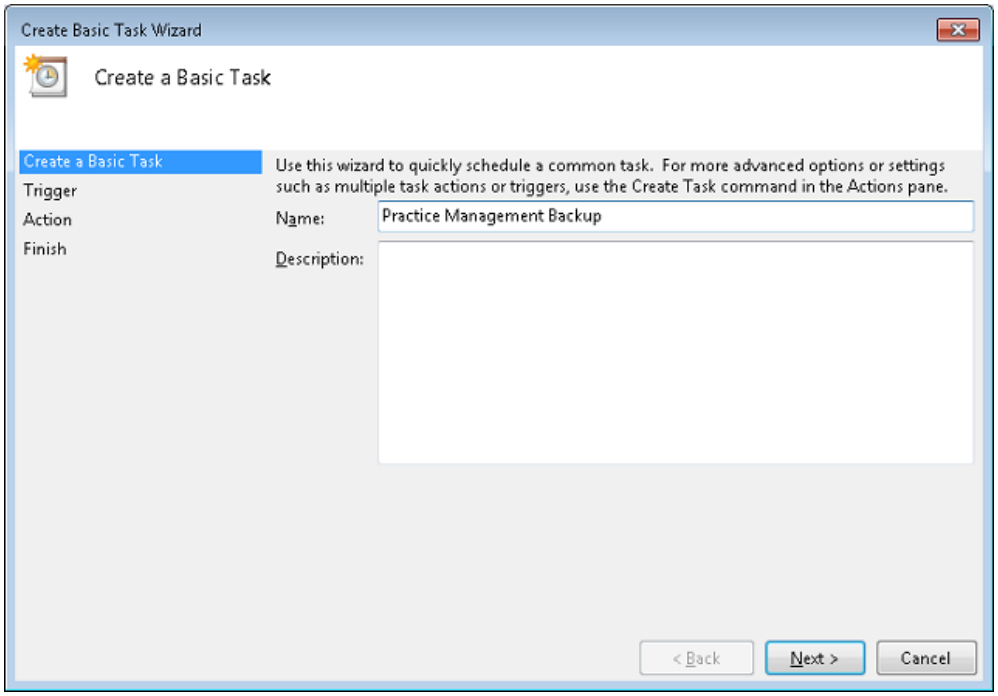
Scheduling a Batch File

Use the following instructions to set up a task in Windows Task Scheduler to run the batch file. These specific instructions are for Server 2008. Other versions of Windows have similar functionality.

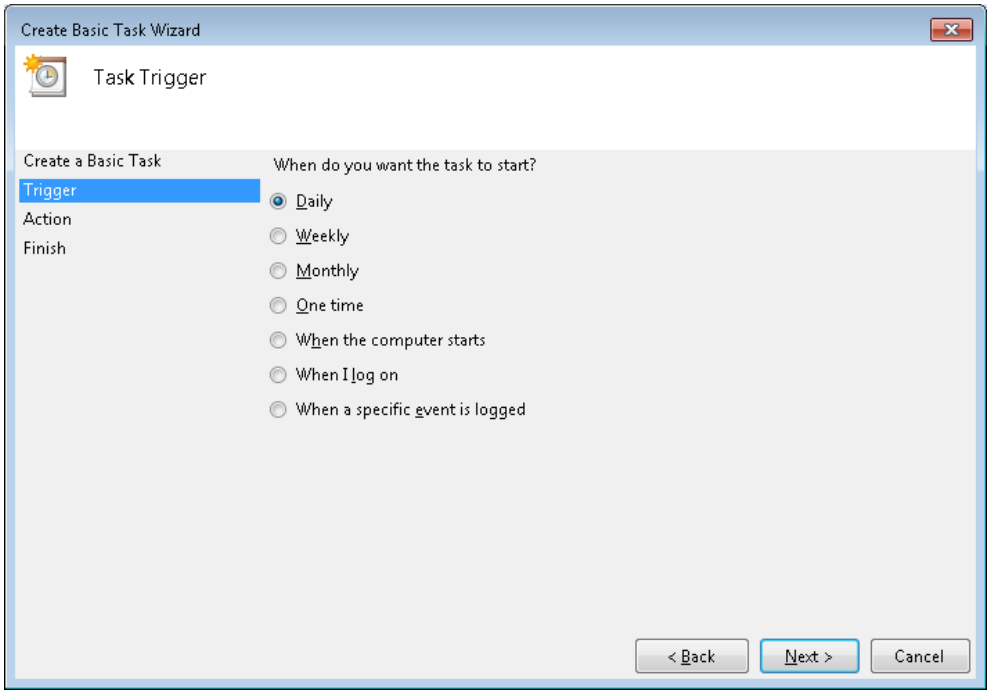
1. Click **Start > All Programs > Accessories > System Tools > Task Scheduler.**
2. The *Task Scheduler* dialog opens. Click **Action > Create Basic Task…**



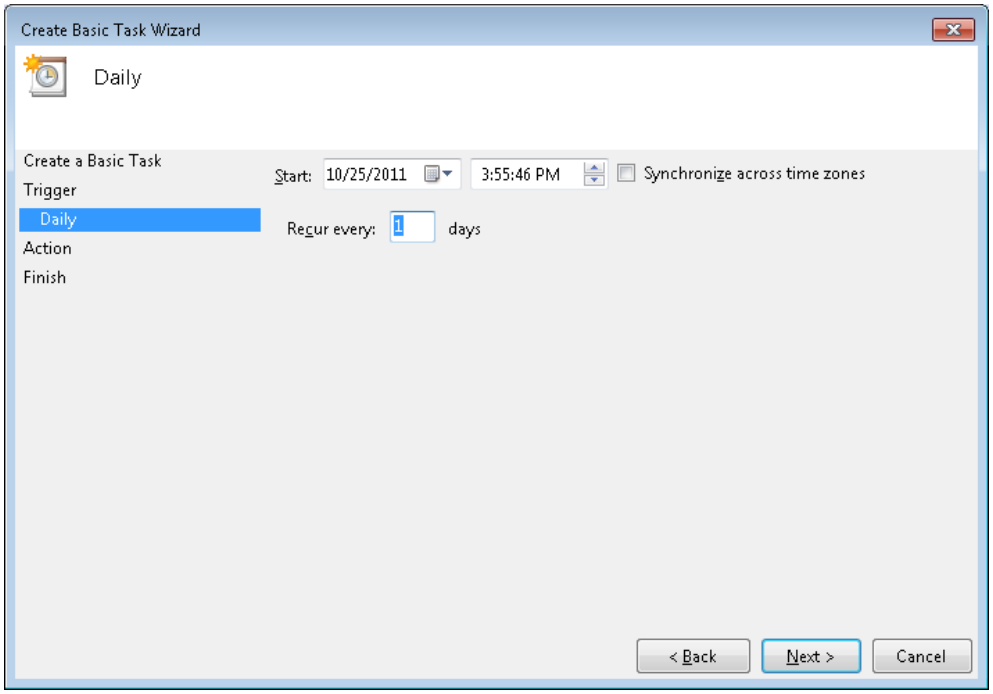
3. Enter a descriptive name in the Name box, and click **Next**.



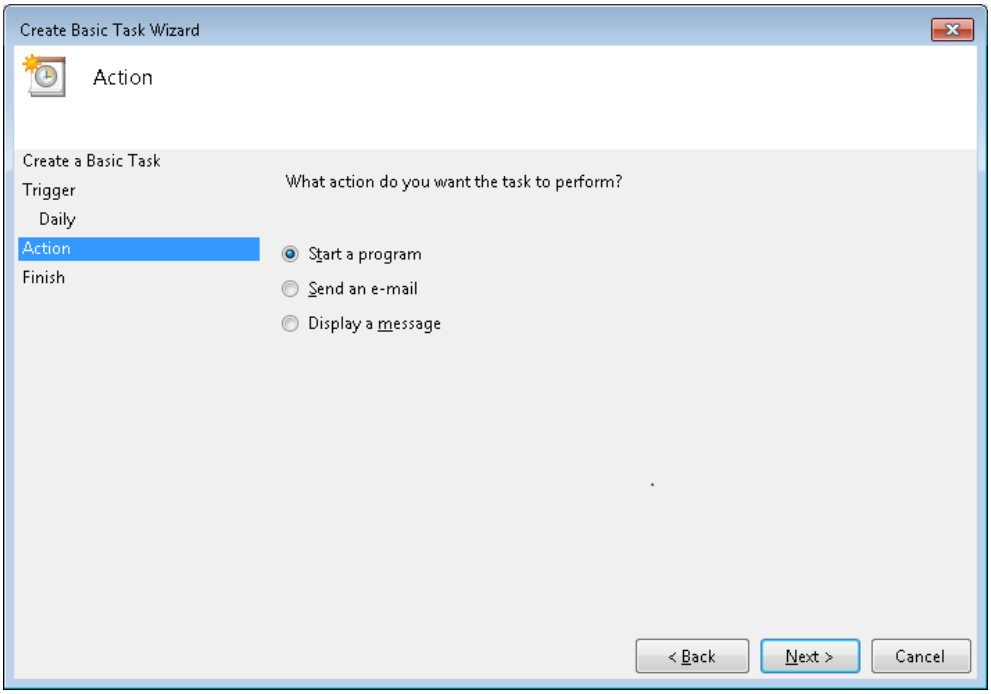
4. Leave **Daily** selected on the Trigger page, and click **Next**.



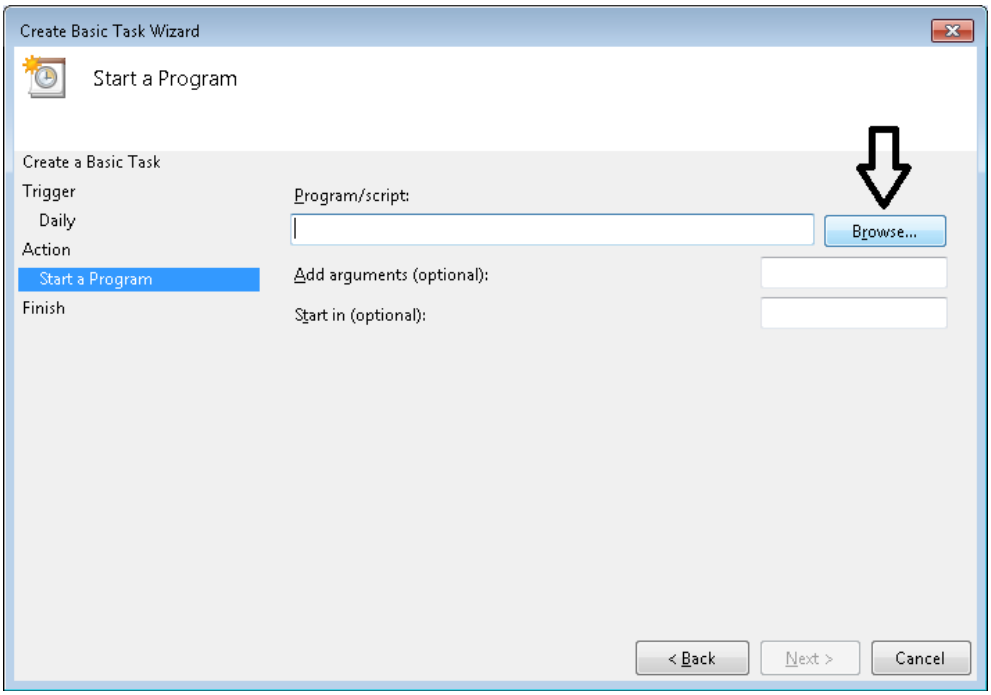
5. Enter the start time for the backup, leave the **Recur Every option** at one day, and click **Next**.



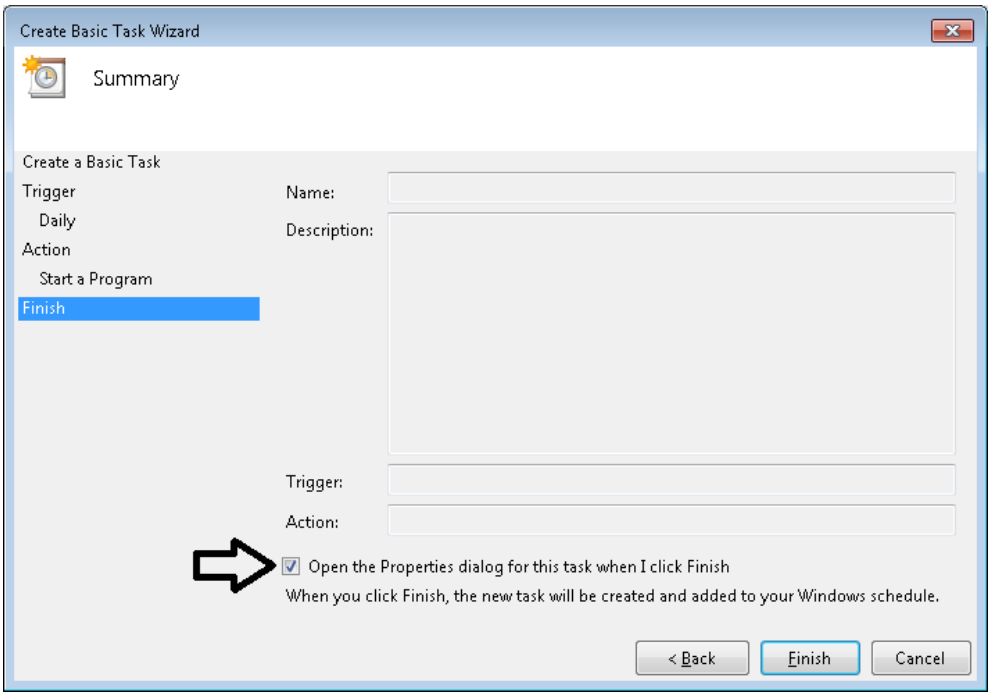
6. Leave **Start a program** selected and click **Next**.



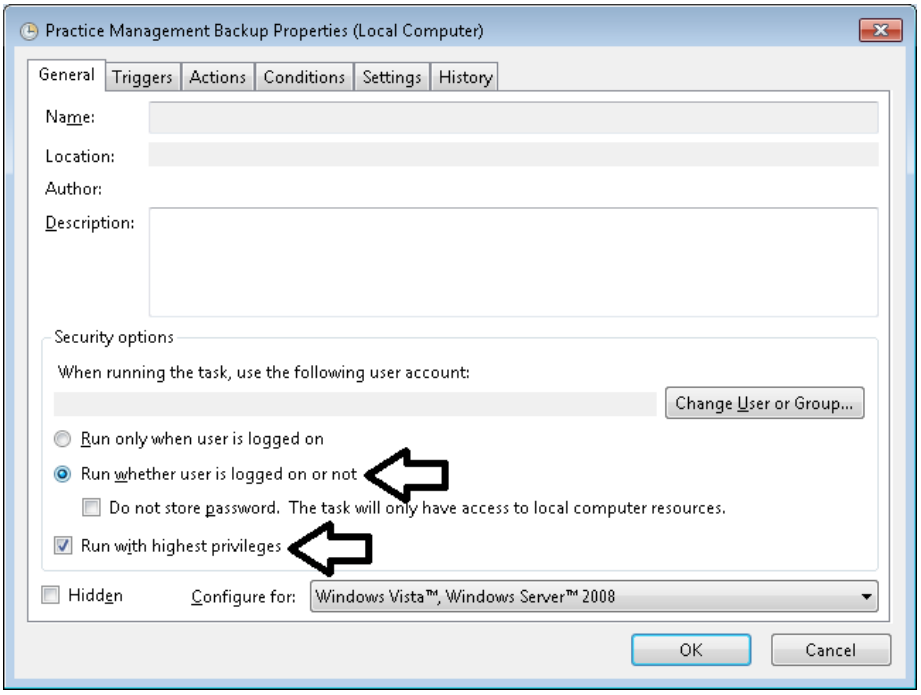
7. Click **Browse** and browse to the batch file you created earlier. Select the batch file, click **Open**, and then click **Next**.



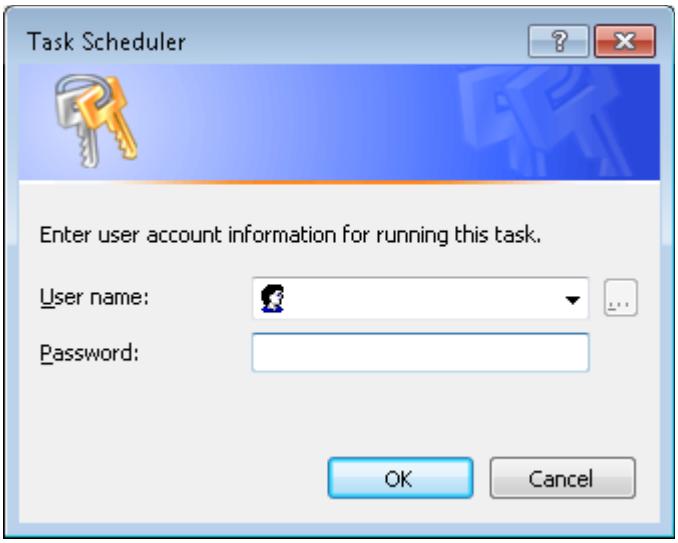
8. Select the **Open the Properties dialog for this task when I click Finish** box and click **Finish**. The *Properties* dialog opens.



9. On the general tab, select **Run whether user is logged on or not** and check **Run with highest privileges**.



10. Click **OK**.
11. Enter the user name and password for the Windows user account, and click **OK**.



To test the task, right-clicking it in Task Scheduler and click **Run**.

Notes:

- The Windows user account you log in to must have local administrator permissions.
- Check the backup file for a changed modified date for the first few days to make sure the task is running as scheduled.
- If the password for the Windows account changes, then reopen this task and enter the user name and new password.

Other Items to Backup

The Practice Management server install folder is called CPAS. We recommend backing up this folder with the database during your normal nightly backup process. Recovering the folder and its files will make recovering from a major server issue easier and quicker.

If the entire folder cannot be backed up, there are two folders that should be backed up:

- **CPAS\vpm\rtf** folder, which is named the same as the database.
- **CPAS\vpm\images** folder, if pictures are used in the header or footer of invoices and statements.

These items will need to be backed up using the server backup procedure.

Moving and Renaming the Backup

The backup process described above creates the backup on the same machine as the SQL server. If you do not store the backup in an additional location, it can be lost during a major server issue.

Tip: It is advised to include the backup file in the normal nightly backups for the server. Moving the backup file off the server is the only way to make sure it is available in the event of a major server issue.

You can also create a batch file that will move the backup file to another location, such as a network drive. The backup process described below overwrites the backup file created the last time the script ran. This prevents the backups from overusing hard drive space. Occassionally, it is useful, or required, to keep multiple backups for a database. Use the following procedure to make a batch file that will:

- Move a backup file to a new location
- Add the date and time to the file name

Do create the batch file, do the following:

1. Open Notepad.
2. Enter the following command:

   Copy "*OriginalBackuplocation**BackupFile*.**BAK**" "*NewBackupFolder*"

   @echo off

   for /F "tokens=2-4 delims=/ " %%i in ('date /t') do set yyyymmdd=%%k%%i%%j

   echo Date: %yyyymmdd%

   for /F "tokens=1-2 delims=: " %%l in ('time /t') do set hhmm=%%l%%m

   echo Time: %hhmm%

   REM -- or use both

   echo %yyyymmdd%%hhmm%

   rem -- here is the copy command with just the date appended

   RENAME "*NewBackupFolder**BackupFile*.**BAK**" *BackupFile***%yyyymmdd%%hhmm%.BAK**

   - *OriginalBackuplocation* – Folder path to the location the backup is created in.
   - *BackupFile* – name of the file created by the backup process. Do not include the BAK extension.
   - *NewBackupFolder* – folder path or storing the backup files.

3. Test the command.
   a. Click **Start > Programs > Accessories > Command Prompt**.

b. Copy the command from the text file and paste it in the command prompt window.

c. Press the **Enter** key to test for errors.

   If the prompt does not run correctly, review and correct the command text in your text file.

4. Select **File > Save As**.
5. Browse to the folder you wish to save the batch file.
6. Enter the name of the batch file with the file extension **.bat**.
7. Click **Save**.
8. Set up a separate scheduled task for this batch file and schedule it after the backup task has been completed.