



## Backing Up and Restoring in Version 12

Property Management Solutions for Over 30 Years

This document covers 4 areas.

- 1) The [options](#) for making compressed copies of the essential database files from within the PROMAS program.
- 2) The choices of what to backup off-network for use in the event that it is needed.
- 3) Copy backup [off-line](#).
- 4) How to [restore](#) a backup.

### OVERVIEW

We cannot stress enough how important it is to back up your PROMAS files. The general guideline is to backup whenever you have entered more transactions than you want to re-enter, but the norm is to do daily backups. Things happen, and you don't want to spend time trying to recreate days, weeks, or months of data.

The primary reason for having access to a backup is to recover from something that happened to the current live database. You may need to restore a backup if the hard drive fails, is damaged, stolen or deleted. Having multiple backups to fall back on is essential if one or more of the database files are damaged but not recognized as damaged for a period of time.

Automated backups initiated from the PROMAS program are stored on the same hard drive as the database. They in turn should be backed up and/or copied to an offsite location. Having the backups in more than one off-network location is recommended.

Often, the only time you realize that a file is damaged or missing is when the program that created it attempts to read it. The backup program has no way of telling whether the information it is backing up is valid or not, it can only verify that it reads the information correctly from the hard drive. Consider the example of a word processing file that contains a lease that took half a day to type in and a few hours of very careful scrutiny to make sure there were no mistakes (in other words an important file that is time consuming to reproduce). Assume you used this file last on January 25th. If this file became damaged because of an operating system error on March 5 and you didn't need to print the lease again until June 20th, you will not know about the damage until that time. You will need to find a backup that was made before the file was damaged.

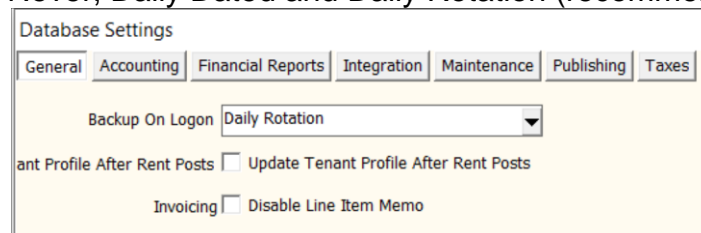
A backup is worthless if it is unavailable or cannot be restored. We recommend that the restore process be tested periodically. Refer to the restore process at the end of this document.

## WAYS TO BACKUP within PROMAS

The methods described below make a backup of the essential files in the Database folder but do not back up the Supporting folders: Documents, License or Upload. All of the automatic backups are placed in the Backups folder except the Support backup. The Backups folder is on the same level as the LL12\_Database folder.

### 1. Automatic Backups

The automatic backups are governed by the Backup at Logon setting in Setup, Database Settings, General tab. Choices are Never, Daily Dated and Daily Rotation (recommended).



When the first person logs on each day the essential database files will be compressed and placed into a Backups folder under the Data folder. There are 3 options.

- **Never** – Automatic backups are disabled.
- **Daily Dated** – the backup file is named “Backup of LL12\_Database for YYYY-MM-DD.bkp”
- **Daily Rotation** – (default) the backup files are named “Backup of LL12\_Database for Day 1 Monday.bkp”, ...Day 2 Tuesday, ...Day 4 Thursday, ...Day 5 Friday. They are overwritten each week. On the second Wednesday the backup is named “Backup of LL12\_Database for MM Month.bkp” (e.g. 11 November). It is overwritten each year. On all other Wednesdays the file is named Week1, Week3, etc. These are overwritten each month. One named Yearly is done on the second Wednesday of January.

### 2. Help, About

In Help, About there are 2 backup options.



- **Daily Backup** creates a backup of your database in the Backups folder. It will be named based on the settings in Database Settings above, and will overwrite the file that was made when the first person logged in.
- **Support Backup** creates a backup of your database in the RPROMAS\Support folder named “LL12\_Database for YYYY-MM-DD.bkp”.

### 3. File, Backup Database

This function will create a backup of your database in the Backups folder. It will be named based on the settings in Database Settings above, and will overwrite the file that was made when the first person logged in.

## WHAT TO BACKUP - Off Network

The chart below lists what will be backed up when you backup the working folder, data folder and database folder. The location of those folders can be found in Help, About.

The essential database files are critical to being able to restore your data. The LL12\_Database folder contains the essential files. You can find the location in Help, About, Data Folder. The Backups folder has the automated backups and is on the same level as the LL12\_Database folder.

There are folders in the same parent folder as the database folder that need to be backed up. The Backups folder is most important and should be done daily. The Document folder and Upload folder should be backed up periodically.

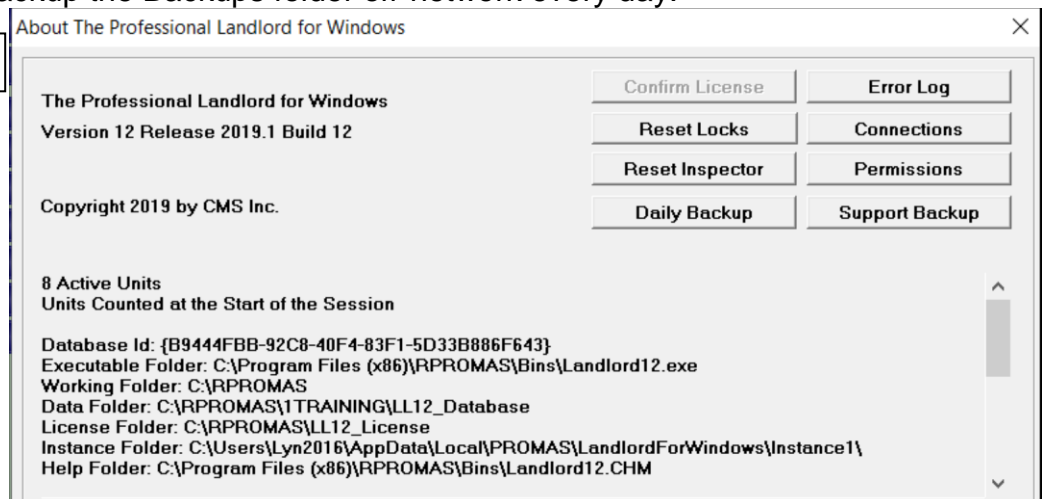
The License folder contains the login and user access settings. You can find its location in Help, About, License folder. It should be backed up after any changes to your registration or user information.

Your choices for backing up are the LL12\_Database folder, the data folder or the Working Folder. The most comprehensive backup is the Working folder. We recommend that you back it up monthly and archive it.

Backing up the Data folder is what we recommend you back up off-site everyday. If you have more than one active database you should backup each one.

As a minimum you should backup the Backups folder off-network every day.

**Help, About screen**



What gets backed up when you backup the:		
<u>Working folder</u>	<u>Data folder</u>	<u>LL12_Database folder</u>
License folder		
Data folder		
Backups folder	Backups folder	
Document folder	Document folder	
Upload folder	Upload folder	
LL12_Database folder	LL12_Database folder	
Database files	Database files	Database files

## DO's and DON'T's

### DO

- ❖ Backup every workday.
- ❖ Take the backup offsite.
- ❖ Use a new DVD each time.
- ❖ Verify that you can restore at least monthly.
- ❖ Do secondary backups to other media.
- ❖ Make sure the backups are being done.
- ❖ Retain end of year backups for at least 5 years.

### DON'T

- ❖ Copy over a previous backup.
- ❖ Trust someone else completely.
- ❖ Leave all backups in one place.
- ❖ Have a limited number of backups.
- ❖ Forget to backup.
- ❖ Forget to verify that you can restore.
- ❖ Delete files from the Backups folder

## BACKUP METHODS

Online backup services that maintain your backups in the cloud are recommended as one source. Doing an internet search for "online backup services" will help you identify potential providers.

Subscribers to PROMAS Central can make a backup through Internet Publishing that is put into the upload folder. It will be uploaded to PROMAS Central when you publish.

Other methods include copying to a rotation of hard drives, CDs, DVDs or USB drives that are maintained offsite.

### How to find an on-line backup service:

Search for "online backup services" or look for information from PC Magazine ([www.pcmag.com](http://www.pcmag.com)). They do a comparison each year.

Some possibilities:

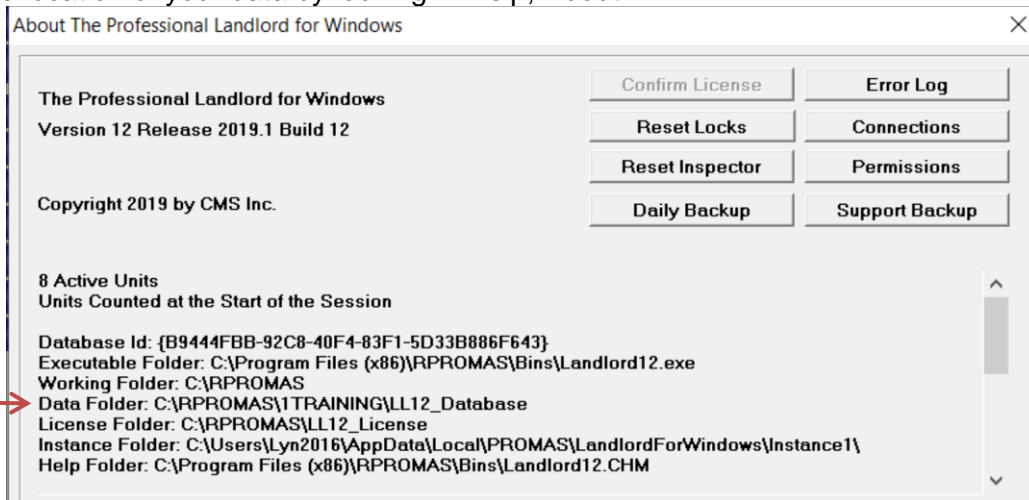
- IDrive
- CrashPlan
- SOS Online Backup
- SugarSync
- Carbonite
- SpiderOakONE
- Acronis True Image Cloud
- Backblaze
- EMC MozyHome
- OpenDrive

## RESTORE

The Professional Landlord™ can automatically restore a backup file when it is placed in an empty folder. The typical location of the data is:

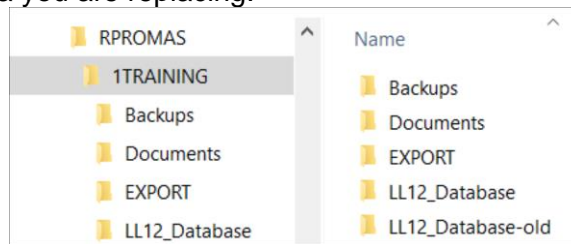
\\MyServer\RPROMAS\DATA\LL12\_Database

You can find the location of your data by looking in Help, About.



To restore a backup the recommended steps are:

1. Locate the database folder. It is named "LL12\_Database". The actual location is listed in Help>About if you have access to the data you are replacing.



2. Rename the "LL12\_Database" folder. For example, "LL12\_Database 2015-01-27" for a folder renamed on January 27, 2015.
3. Create a new "LL12\_Database" folder.
4. Copy the backup file into the new "LL12\_Database" folder.
5. Open PROMAS and log in. You should get a message that says ready to restore. Say Yes.

