Pontem® Backup and Restore Procedures

INTRODUCTION

When it comes to safeguarding your organization's electronic records, the importance of backing up your database regularly and often cannot be stressed often enough. Despite significant technological advances, it's not a question of _if_ you'll experience hard drive failure or some sort of other unfortunate data loss, it's a question of _when._

For proper database maintenance, we recommend you perform a backup and immediately restore the resulting .fbk file prior to applying every Pontem software update, and at regular Intervals in between to eliminate the time-consuming task of having to reconstruct your database after a catastrophic event.

All Pontem products contain built-in utilities which simplify database backup and restoration procedures. The remainder of this document will explain how to use this invaluable and easy to use tool.

However, if you prefer, you can opt to subscribe to Pontem's Remote Backup (PRB) service which will _automatically_ back up your files, giving you worry-free data assurance. For more information about this very affordable addition to your complement of Pontem products, call us toll-free at 888.742.2378 or send us an email at sales@pontem.com.

IMPORTANT NOTE: The built-in backup feature in your Pontem software saves a copy of your Pontem data to the hard drive of your computer or the hard drive of your network server, <u>and **should not** be the sole means of data recovery.</u>

If you experience a hard drive crash or other failure, you will lose your backup files as well as the rest of your data. It is strongly suggested that you have an alternative method of backing up your data in addition to using this feature.

Once a backup file has been created, it should be saved to some form of external media, such as a CD, flash drive, or standalone backup device.

Backup and restoration of your database can each take an hour or longer depending on the size of your database. Given that, we suggest you conduct back up and/or restoration of your Pontem database during non-peak periods to keep work disruptions to a minimum.

Backing Up Your Database

While logged into the database, click on **File | Maintenance | Backup your Pontem [name of application] Data** from the menu bar.
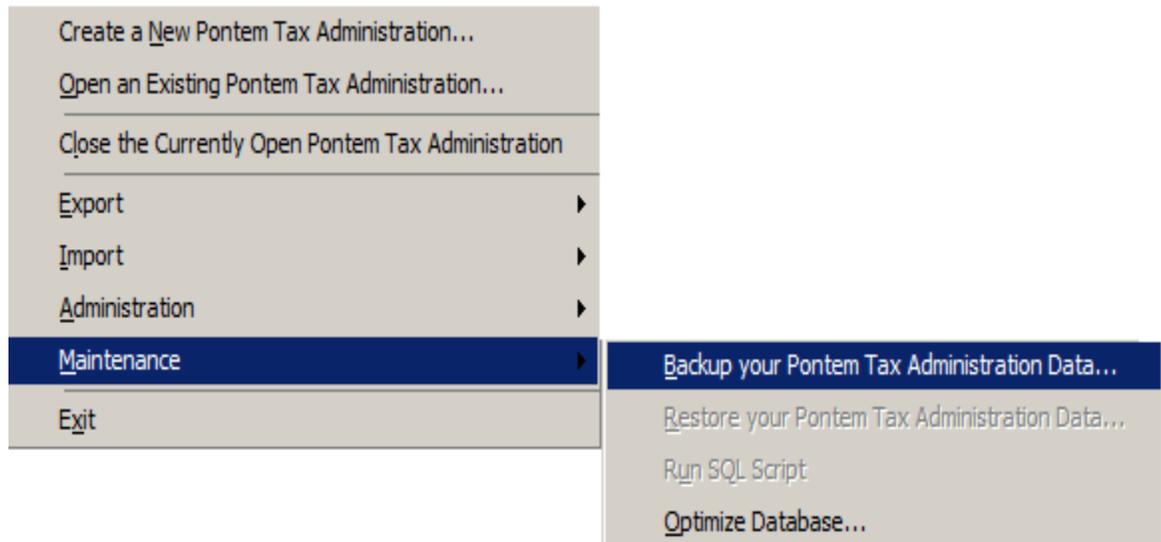
A **'Backup'** window will appear displaying the path where the file will be created, and a description of the backup file.
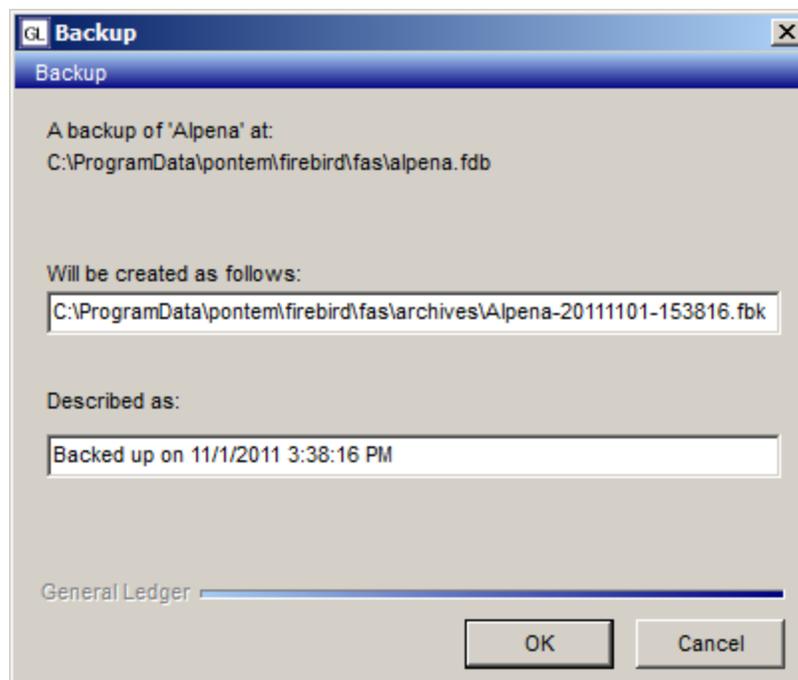
All backup files will be saved to an archives folder location as defined in the Pontem Metadata. Click **OK** to start the backup. Note the name of your backup file (.fbk) contains the database name, and the date and time the .fbk file was created.

The following notification will appear when the backup is complete:
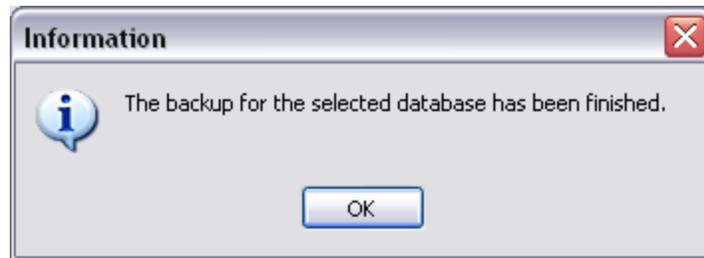
Click **OK** to close the backup utility.

NOTE: If you do not have rights to save a file or gback.exe is not installed you will receive an error message that a backup cannot be performed. Contact Pontem Technical Support for assistance.

About Restoring Your Database

In addition to actual program upgrades, software enhancements sometimes relate to Pontem's underlying data manager (Firebird SQL). Though these types of upgrades occur less frequently and may not be immediately obvious to you as a user, they are extremely important to the overall use and performance of your Pontem software.

The restore process will automatically update and make changes in your Firebird database which are necessary in order for the latest Pontem upgrade to be applied. The restoration process will also remove superfluous elements which have compiled in the database due to continuous use. As a result, you will often detect an increase in the speed of database transactions once a backup file is restored.

NOTE: Users cannot be logged into a database when a restore operation is in progress. Restoration processes must also be run from your server if the software is installed on a network.

Restoring Your Database from a Stored Backup

At your Pontem software login screen click '**Cancel**.' From the menu bar, click on
File | Maintenance | Restore your [*Pontem Product*] Data.
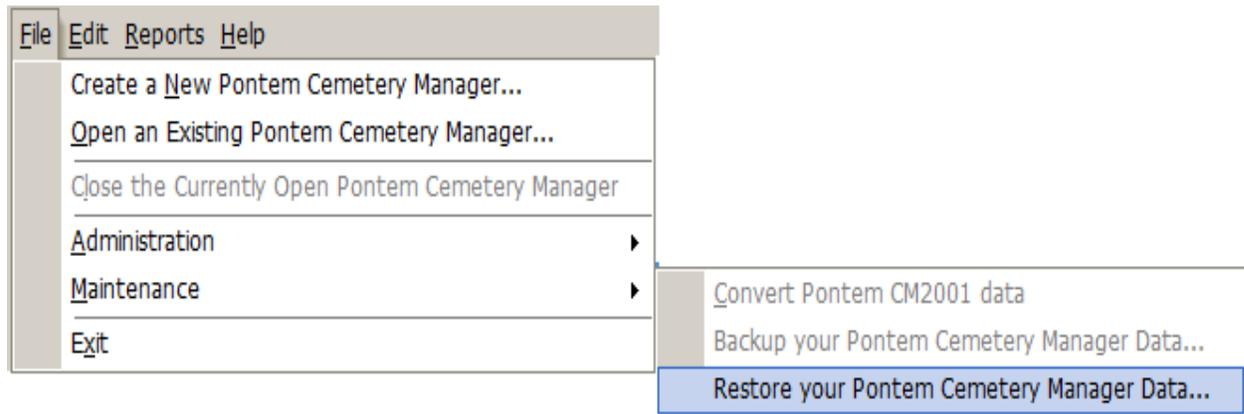
Next, the '**Restore**' window will appear:
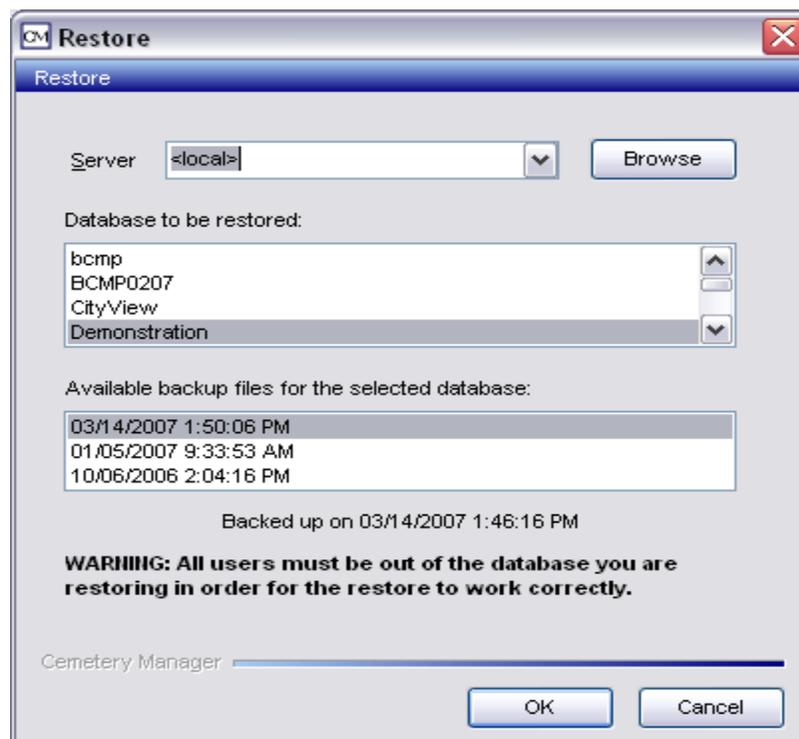
Select a backup file from **Database to be Restored** list. The list shows all existing backup files.
The newest backup file can be found at the top of the list. Click **OK.**

NOTE: If your Pontem software database is stored on a computer other than your local machine, select the name of the appropriate server from the drop-down list or click on the '**Browse'** button to find and select the name of the server where your data resides.

In a network environment, any user on the network with access to the Pontem software product being restored can perform a backup of your Pontem database if he/she has sufficient network rights to do so.

However, restoration of your files can only be performed at the server. In addition, please remember all users must be logged out of the database you are restoring until the process has completed.

Once your database has been restored you will see the following advisory:
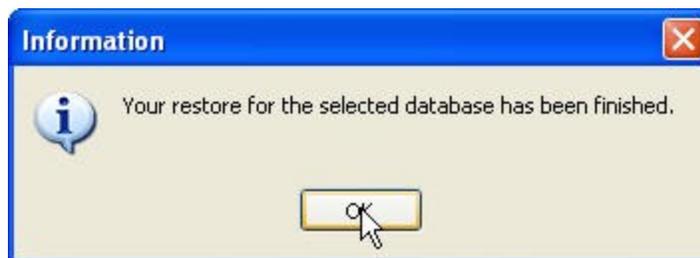
Click **OK** to acknowledge the message and close the restore utility. Restoration of your Pontem database is now complete.

Technical Support...

If you require additional assistance in performing a backup and restore of your Pontem software please don't hesitate to contact a member of our Support Team. Our goal is to help you get the most out of your Pontem Software investment. We would be happy to help.

Pontem Help Desk

Call **888.237.8531** toll-free
Submit an online support request at: http://www.pontem.com/Support-1
Email: support@pontem.com