rb8

RB8 Disaster Recovery Guide

Disaster Recovery

What would you do if the server containing your RB8 database crashed?

All hard drives fail eventually. How would you recover your data and keep your business running? When disasters strike unprepared companies, the consequences range from prolonged system downtime and the resulting revenue loss to the companies going out of business completely. Yet based on calls to RB8 support concerning hard drive crashes, we have found that many of our clients are not prepared to deal with such scenarios.

In brief, you should have a backup protocol for your office that is actively followed. This guide covers three simple tasks you should do to protect your RB8 data:

- automatic backup,
- backup to a remote location,
- future calendar emails.

This guide is not meant as a complete office disaster recovery resource. For example, RB8 uses Microsoft SQL Server as its database engine. Maintaining the SQL Server is your technician's responsibility and beyond the scope of this guide. However, we have found that RB8 clients who follow these protocols, along with other best business practices for disaster recovery, are able to handle the inevitable event of a hard drive crash or other disaster much easier, with little to no effect on their clients.

Database Manager

Setting up for automatic backups

Due to the way that Microsoft SQL Server controls RB8 databases, you cannot back up your RB8 database by using the standard Copy utility. Therefore, RB8 includes a tool for automatically backing up the database even when RB8 is in use.

When the RB8 Server is installed initially, an automatic task is created that will make a backup of your RB8 database at a specific time every day. You can change your automatic backup defaults, such as the start time.

To protect your information, back up this backup file (and the other file folders — including your depository) to external devices and store them away from the office. (See "Replicating data to other locations.")

1. On the menu bar in RB8, click **Tools** > **Database Manager.**

2. On the left side of the Database Manager window, icons appear representing the main functions.
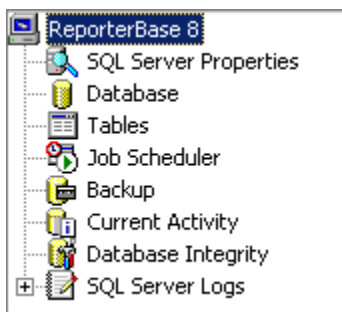
3. Click **Backup** if you want to modify the default settings. For example, you might want to change the time backups start.


4. On the menu bar in RB8, click **Tools** > **Users and Groups.**

5. On the left side of the Users and Groups window, icons appear representing the main categories. Click the "+" next to **Groups** (or double-click **Groups)** to expand the level, displaying its subcategories underneath.

6. Click **Alert Groups** to display the alert groups set up by the system in the Results pane.

7. Right-click **Database Backup Status Notification,** then choose **All Tasks** > **Add Members to a Group.**
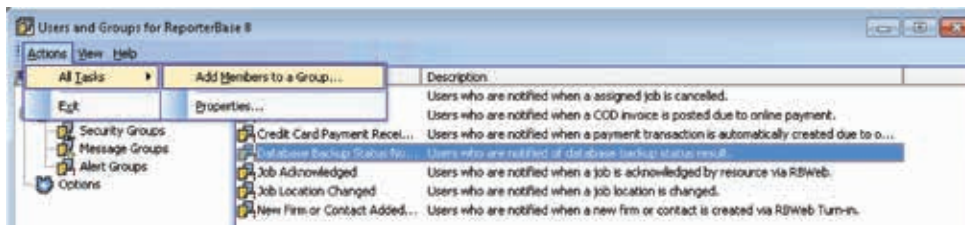
8. In the Select Users window, check all of the users who should receive the backup status alerts daily, then click **OK.** You should notify at least two people, including the IT manager.

> **NOTE**
>
> Backup status alerts are sent via RB8's Message Center.

Remote Backup
Replicating data to other locations

After RB8's built-in backup tool makes a copy of your RB8 database (located in the Data directory) and stores it in the Backup directory, the next step is to make a backup copy of the Backup directory and store it in a different location, such as an online data service or a removable drive that you take home with you each night. Otherwise, you will lose both the current data and its backups when the hard drive crashes.

At least once a day, make a <u>full</u> backup of the following directories:

*   **Backup**
*   **Depository**
*   **Update**

There are many backup solutions available. Please consult your IT resource to implement a cost-effective and reliable system.

Calendar Printout

Emailing future calendars to yourself

If you cannot access RB8 for whatever reason, how would you contact your clients for tomorrow's jobs? Be prepared. Run the Calendar Printout report for future jobs every night before you go home. Then email the PDF version to your personal email account.

1. In **Calendar > Calendar Printout:**
   - Select Yes in the **Future Calendar** drop-down.
   - Select Yes in the **Show Detail** drop-down.

2. Click **Search.** RB8 lists all future jobs as a report.

3. Click .

4. In the Export dialog box, select MAPI in the **Destination** drop-down, then click **OK.**

5. In the Send Mail dialog box, enter your personal email account, then click **Send.**

> **!** **IMPORTANT**
>
> The personal email account you use for this task should be independent of your office. In other words, it should not be a part of your office network or email system. That way, if the reason you cannot access RB8 is due to office network problems, you will still be able to get your Future Calendar file.

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