

Backing Up & Restoring Data

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Back up your OfficeMate/ExamWRITER database files on a regular basis! A full database backup is the best way to make sure that you can recover your OfficeMate/ExamWRITER database files in the event of a database corruption, hardware or software failure, computer virus attack, fire, theft, or natural disaster.

Share this information with your backup service provider or your certified operating system and network technician.

NOTES

- Eyefinity limits the support it provides exclusively to its own products and, therefore, does *not* provide assistance or support for any issues related to the backup and restoration of data. Eyefinity does not guarantee nor validate the integrity of backup files.
- Eyefinity highly recommends employing a certified operating system and network technician to advise you on recommended data backup procedures.
- Eyefinity recommends backing up your OfficeMate/ExamWRITER data *every day*.
- Eyefinity recommends using *multiple* back up methods and backing up your data to *multiple* files in case one backup file is lost or corrupt.
- The OfficeMate/ExamWRITER programs do *not* provide backup functions.

Read this document carefully to ensure a successful backup and recovery plan.

Determining Your Database Type

There are two areas that must be backed up to ensure a successful recovery plan:

- **The database.** For more information, go to “[Determining Your Database Type](#)” on page 2.
- **The DATA folder.** For more information, go to “[Determining the Location of Your DATA Folder](#)” on page 3.

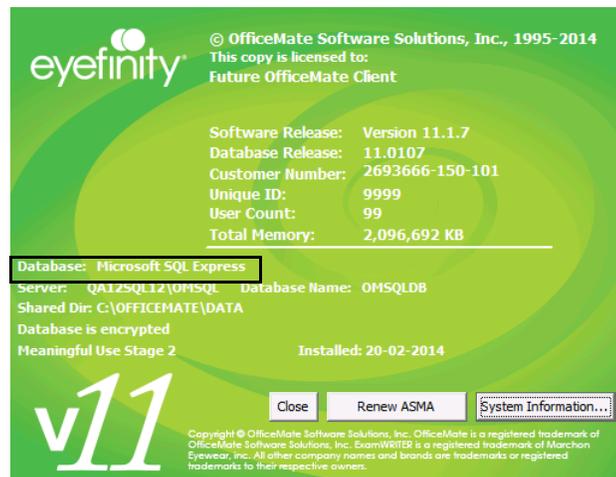
Before choosing the data backup solution that is best for your practice, you need to determine what type of database underpins the current version of your OfficeMate/ExamWRITER software. Your OfficeMate/ExamWRITER software uses either an Access database or a SQL database. Your data backup provider or certified operating system and networking technician will need to know your database type to be able to properly set up the backup system.

To determine your database type, perform the following steps:

1. Open OfficeMate or ExamWRITER.
2. Click **Help**.
3. Click **About OfficeMate**, **About ExamWRITER**, or **About Administration**, depending upon which software you have open.

The About window opens.

4. Look for the *Database* information to determine the database type.



If you see...	Then...
Microsoft Access 2000	You are using an Access-based database.
Microsoft Express or Microsoft SQL Express	You are using an SQL-based database.

5. Tell your data backup provider or certified operating system and networking technician which database type your OfficeMate/ExamWRITER software uses.

Determining Your SQL Database Server & Name

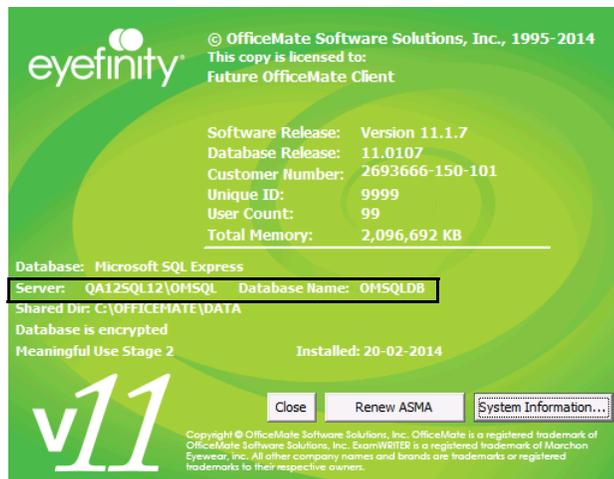
If you are using a SQL database, your data backup provider or certified operating system and networking technician will need to know the SQL server instance and database name to be able to properly set up the backup system.

To determine your SQL server instance and database name, perform the following steps:

1. Open OfficeMate or ExamWRITER.
2. Click **Help**.
3. Click **About OfficeMate**, **About ExamWRITER**, or **About Administration**, depending upon which software you have open.

The About window opens.

4. Look for the *Server* and *Database Name* information.



5. Tell your data backup provider or certified operating system and networking technician the SQL server instance and database name. Additionally, tell your provider or technician to backup the audit database if you are using version 10.0 or above.

Determining the Location of Your DATA Folder

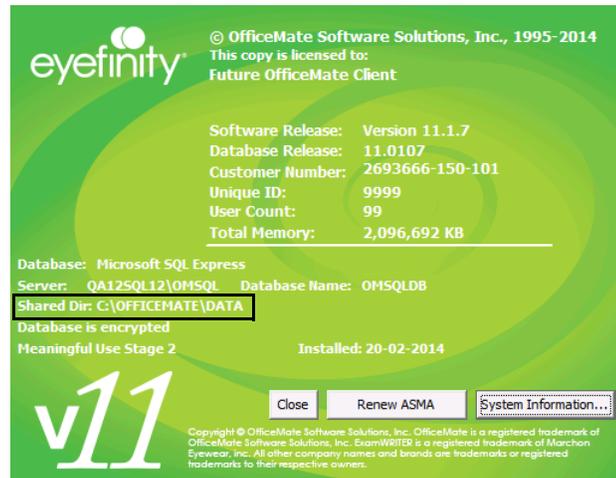
In addition to backing up your database, you must also back up critical files that are stored in your DATA folder. The DATA folder contains such files as eDocuments, electronic claims, etc. Your data backup provider or certified operating system and networking technician will need to know the location of your DATA folder to be able to properly set up the backup system.

To determine the location of your DATA folder, perform the following steps:

1. Open OfficeMate or ExamWRITER.
2. Click **Help**.
3. Click **About OfficeMate**, **About ExamWRITER**, or **About Administration**, depending upon which software you have open.

The About window opens.

4. Look for the *Shared Dir* or *Data Dir* information to determine the location of the DATA folder.



NOTE

The DATA folder is usually located at \\Server\OfficeMate\DATA or \\Server\OMATE32\DATA.

5. Tell your data backup provider or certified operating system and networking technician where your DATA folder is located.

Automatically Backing Up Databases

This section tells you how to automatically back up your database and includes the following topics:

- [Choosing an Automatic Backup Method, 4](#)
- [Automatically Backing Up an Access Database, 6](#)
- [Automatically Backing Up a SQL Database, 6](#)

Choosing an Automatic Backup Method

Eyefinity recommends using *multiple* back up methods and backing up your data to *multiple* files in case one backup file is corrupt. Work with your data backup provider or certified operating system and networking technician to determine which solution is best for you.

Use the following table to help you decide which backup method(s) are best suited for your practice.

Backup Method	Advantages	Disadvantages	Recommended Solution
Online	<ul style="list-style-type: none"> • Provider installs, sets up, and maintains the backup software • Backups are automated • Easy restoration process • Off-site backup, not susceptible to local disasters or theft • Low cost to set up and maintain 	<ul style="list-style-type: none"> • Backup times vary depending on the speed and reliability of your internet connection • Backups are subject to the bandwidth and data transfer limitations set by your internet service provider 	<p>DataHEALTH 800.269.3666 or sales@eyefinity.com</p> <p>Practice Shadow by Think Smart Group, Inc. 800.941.4913.</p>
Local	<ul style="list-style-type: none"> • Ideal for large practices with in-house IT • No need to worry about data limitations or service interruptions 	<ul style="list-style-type: none"> • Requires more technical knowledge to install, backup, and restore • Requires investment in backup software and hardware • Additional expenses for off-site, secure, physical storage • Unsecured backups are susceptible to theft, fire, or natural disaster 	<p>For Access databases: Veritas Backup Exec www.veritas.com</p> <p>For SQL databases: Veritas Backup Exec with Agent for Applications and Databases www.veritas.com</p> <p>Go to “Determining Your Database Type” on page 2 to find out if you are using an Access or SQL database.</p>

Although there are many types of backup media that you can use to back up your database files (for example, CD-R, DVD-R, USB flash drives, and external hard drives), Eyefinity recommends using DataHEALTH for data backup and off-site storage. DataHEALTH protects your practice by automatically backing up, encrypting, and storing your data in a secure, off-site data center. If you

experience a data loss, all of your lost files are recoverable anytime with the click of a button. DataHEALTH also offers the following benefits:

- Provides a level of service that exceeds industry standards for your data storage and recovery needs.
- Automatically backs up and verifies your OfficeMate/ExamWRITER database files.
- DataHEALTH is the only cloud backup company to be URAC HIPAA Security Business Accredited along with FIPS 140-2 encryption validated.
- DataHEALTH's cloud backup service is powered by Asigra: an enterprise-level, awarding-winning cloud backup software.
- DataHEALTH's cloud backup powered by Asigra goes through five key checks to ensure that your data is always restorable.
- DataHEALTH's Backup Support professionals have restored data expediently for thousands of customers.
- Cloud backup with DataHEALTH is cost effective. Pricing starts at \$20.00/month, which is less than \$1/day.
- DataHEALTH has certified advanced cloud backup professionals on staff.
- DataHEALTH's technical support and customer service staff are based in the United States. In a time of emergency, you want support that is stateside. No worries of dealing with language barriers!

DataHEALTH offers a free 30-day, obligation-free trial. For more information on this offer and DataHEALTH, contact Eyefinity at 800.269.3666 or www.eyefinity.com/strategic-partners/CertifiedPartners.html.

Automatically Backing Up an Access Database

1. Review the documentation and recommendations provided by your backup provider or backup solution.
2. Tell your data backup provider or certified operating system and networking technician where your DATA folder is located. For information about finding your DATA folder, go to [“Determining the Location of Your DATA Folder” on page 3](#).

NOTE

- The DATA folder contains the Access databases and such files as eDocuments, electronic claims, etc.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you also navigate to the location of these documents and back them up.

Automatically Backing Up a SQL Database

1. Review the documentation and recommendations provided by your backup provider or backup solution.
2. Tell your data backup provider or certified operating system and networking technician the SQL server instance and database name. For information about finding your SQL server instance and database name, go to

[“Determining Your SQL Database Server & Name” on page 3](#). Additionally, tell your provider or technician to backup the audit database if you are using version 10.0 or above.

NOTE SQL databases cannot be treated like other files within Windows. SQL databases require such specialized software as SQL Server Management Studio or Veritas Backup Exec with Agent for Applications and Databases to ensure a complete and valid backup. Copying a SQL database without using specialized SQL database management software will cause irreparable damage to the database.

3. Tell your data backup provider or certified operating system and networking technician where your DATA folder is located. For information about finding your DATA folder, go to [“Determining the Location of Your DATA Folder” on page 3](#).

NOTE

- The DATA folder contains such files as eDocuments, electronic claims, etc. These files reside outside of your SQL databases and do not require specialized software to perform a backup.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you also navigate to the location of these documents and back them up.

Manually Backing Up Databases

Eyefinity recommends manual backups only as a temporary measure before upgrading or applying patches to the OfficeMate/ExamWRITER software. Manual backups are not intended to replace automatic backups.

This section tells you how to manually back up your database and includes the following topics:

- [Preparing for a Manual Backup, 7](#)
- [Manually Backing Up an Access Database, 8](#)
- [Manually Backing Up a SQL Database, 8](#)

Preparing for a Manual Backup

1. Review your backup device and media manufacturer’s replacement recommendations and ensure that your backup device and media are within their useful product lifecycle.
2. Clearly label the backup media that you are using for each day of the week that your office is open for business.
3. Review the HIPAA security and privacy requirements and ensure that your backup procedures are compliant.

Manually Backing Up an Access Database

NOTE Eyefinity highly recommends employing a certified operating system and network technician to advise you on recommended data backup procedures.

1. Close OfficeMate and ExamWRITER on all of your computers.

NOTE The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

2. Tell your certified operating system and networking technician where your DATA folder is located. For information about finding your DATA folder, go to [“Determining the Location of Your DATA Folder”](#) on page 3.

NOTE

- The DATA folder contains the Access databases and such files as eDocuments, electronic claims, etc.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you also navigate to the location of these documents and back them up.

Manually Backing Up a SQL Database

NOTE Eyefinity highly recommends employing a certified operating system and network technician to advise you on recommended data backup procedures.

1. Close OfficeMate and ExamWRITER on all of your computers.

NOTE The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

2. Tell your certified operating system and networking technician the SQL server instance and database name. For information about finding your SQL server instance and database name, go to [“Determining Your SQL Database Server & Name”](#) on page 3. Additionally, tell your provider or technician to backup the audit database if you are using version 10.0 or above.

NOTE SQL databases cannot be treated like other files within Windows. SQL databases require such specialized software as SQL Server Management Studio or Veritas Backup Exec with Agent for Applications and Databases to ensure a complete and valid backup. Copying a SQL database without using specialized SQL database management software will cause irreparable damage to the database.

3. Tell your certified operating system and networking technician where your DATA folder is located. For information about finding your DATA folder, go to [“Determining the Location of Your DATA Folder”](#) on page 3.

NOTE

- The DATA folder contains such files as eDocuments, electronic claims, etc. These files reside outside of your SQL databases and do not require specialized software to perform a backup.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you also navigate to the location of these documents and back them up.

Restoring Databases

This section tells you how to restore database files and includes the following topics:

- [Restoring Access Databases Files, 9](#)
- [Restoring SQL Database Files, 9](#)

Restoring Access Databases Files

NOTE

If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your certified operating system and networking technician or the manufacturer of your backup media.

1. Close OfficeMate and ExamWRITER on all of your computers.
2. Follow the instructions in your backup program to restore your DATA folder to its proper location. For information about finding the proper location of your DATA folder, go to [“Determining the Location of Your DATA Folder”](#) on page 3.

NOTE

- The DATA folder contains the Access databases and such files as eDocuments, electronic claims, etc.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you restore those files to their proper locations.

Restoring SQL Database Files

NOTE

If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your certified operating system and networking technician or the manufacturer of your backup media.

1. Close OfficeMate and ExamWRITER on all of your computers.
2. Follow the instructions in your backup program to restore the SQL server instance and database name. For information about finding your SQL server

instance and database name, go to [“Determining Your SQL Database Server & Name” on page 3](#). Additionally, restore the audit database if you are using version 10.0 or above.

NOTE SQL databases cannot be treated like other files within Windows. SQL databases require such specialized software as SQL Server Management Studio or Veritas Backup Exec with Agent for Applications and Databases to ensure a complete and valid restoration. Copying a SQL database without using specialized SQL database management software will cause irreparable damage to the database.

3. Follow the instructions in your backup program to restore your DATA folder to its proper location. For information about finding the proper location of your DATA folder, go to [“Determining the Location of Your DATA Folder” on page 3](#).

NOTE

- The DATA folder contains the Access databases and such files as eDocuments, electronic claims, etc.
- If you are storing eDocuments or electronic claims in a location other than the DATA folder, ensure that you restore those files to their proper locations.