

## Backing Up Your ProDoc/SOS Files

IT specialists tell us that all computer hard drives eventually fail. Talk to any lawyer who has experienced this calamity and they will tell you that it was a nightmare. To protect against such data loss nightmares, you should make regularly scheduled backup copies of important data files.

However, as bad as it is to temporarily lose data due to a computer hard-drive failure, it is not the worst calamity that could happen to you. A fire in your building, a major flood, robbery, etc. could completely eliminate all of your precious client and case data forever. Leaving your back up data on site virtually invites such a disaster as some attorneys have found out the hard way.

So, our recommendation is that you follow the instructions provided here to back up your ProDoc and SOS data and then back up this and other important files off-site.

### 1. Overview of the Back Up Process

The ProDoc/SOS backup utility automatically creates a backup of all of your client data and case data, including case answers and links to existing documents.

If you run the SOS program and do your systematic backups from that program, all SOS billing and case management data is backed up, as well as the ProDoc program data listed above.

Due to the flexibility built into ProDoc, many other files containing modifications you may have made to your ProDoc data files may exist. These modifications include document formatting changes; modified master forms; and supplemental volumes, forms, and questions.

The automatic back up features in the ProDoc and SOS programs do not back up these additional personalized files and do not back up your completed documents. For this reason, we strongly encourage you to perform additional systematic backups of your completed documents and any other modified or customized forms and documents you have created, in addition to using the automatic backup utility.

### 2. Creating Your Back Up Plan

As mentioned above, your back up plan should be a two-stage plan.

- A. The first stage is to set ProDoc to regularly and automatically back up the key client and case data in ProDoc. If you also use SOS (Small Office Suite) you only need to run the backup from SOS and it will automatically do so for all SOS and ProDoc client and case data.
- B. The second stage is to set up a regular and automatic backup, preferably off-site, for this data as well as your work product, other specialty modifications in ProDoc, and all

other critical data on your firm computer or server.

- C. Perform the following steps once, and then perform them again any time a user changes formatting, modifies a form, updates supplemental forms/questions or creates/modifies a form set.
  - a. In the installation directory (by default, **C:\ProDoc**), copy any files named **xxxgcfg.ini** (xxx represents user login name or initials) to **Y:\ProDoc Backup Utility Files\** where **Y** represents the backup drive letter. Do the same with the **global.cif** file if it exists.
  - b. In each subfolder of the installation directory, locate the following files and copy them to the same folder name on your backup drive:
    - i. Any files with the extensions .doc, .wpd, .wp, .cif, or .ini.
    - ii. Docgrps.tps, grpitems.tps, Sdocs.tps, SQues.tps, SLogic.tps and SAuto.tps.
- D. If you have set up special configuration files for customized formatting, created supplemental forms, or modified master forms, we strongly encourage you to call our Tech Support team for free assistance on including all of those files in your backup plan.
- E. Your completed ProDoc documents are saved outside of ProDoc on your computer or server. The default location is **C:\Clients** when ProDoc is installed on an individual computer. If you save documents elsewhere, back up the appropriate folders.

### 3. Backup Procedure

SOS users should set up backups through SOS instead of ProDoc to preserve billing and case management data along with client/case data.

The backup procedure is different for each program.

#### A. Perform these steps to back up your SOS data files:

- a. Click **Setup** ► **System manager** ► **System settings** to begin the SOS backup configuration process (Figure 1).

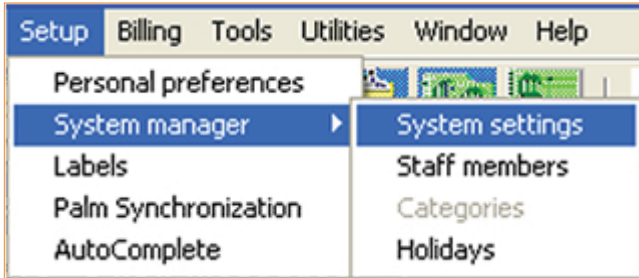


Figure 1 - Begin the SOS Backup Configuration Process

- b. Be certain that the **System** tab is displayed (Figure 2, A). Make the appropriate choices on this page using these guidelines:

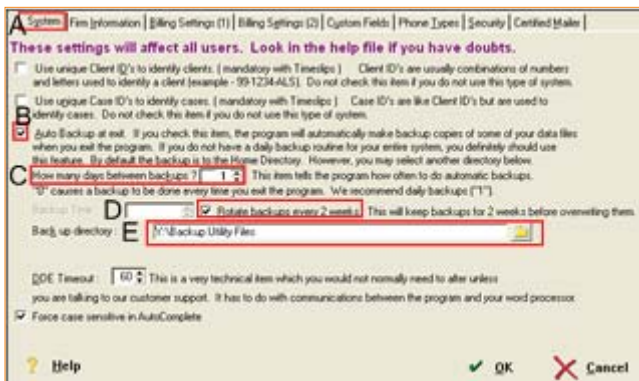


Figure 2 - Make the Appropriate SOS Backup Settings

- i. **Auto Backup at exit** (Figure 2, B) - Check this box to make your backup process automatic.
- ii. Set **How many days between backups?** to 1 day (Figure 2, C). This will cause SOS to run the backup process when the last person logs out of SOS. Setting this option to 0 would cause SOS to run the backup up each time someone logs out of SOS.
- iii. Check the **Rotate backups every two weeks.** box (Figure 2, D). This causes backups to be created at **Y:\ProDoc Backup Utility Files\** as Mon\_1, ...Fri\_1, Mon\_2,...Fri\_2 every time the person triggering the backup closes SOS. This should provide ample time to discover any errors or problems that may have occurred.
- iv. Select your default back up location (Figure 2, E). In

this example the default location is on a network drive at **Y:\ProDoc Backup Utility Files\**.

- v. Click **OK** to save these settings.

#### B. Perform these steps to back up your ProDoc data files if you do not have and/or do not use SOS.

- a. On the Quick Click Menu select **Customize ProDoc** ► **Firm Information** to configure the needed settings.

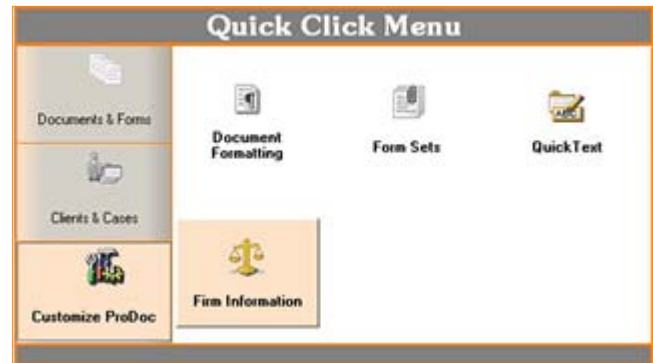


Figure 3 - Begin the ProDoc Backup Configuration Process

- b. In the **Options and Settings** window (Figure 4, A), click **Backup** to reveal the settings options. Make the appropriate selections using these guidelines:

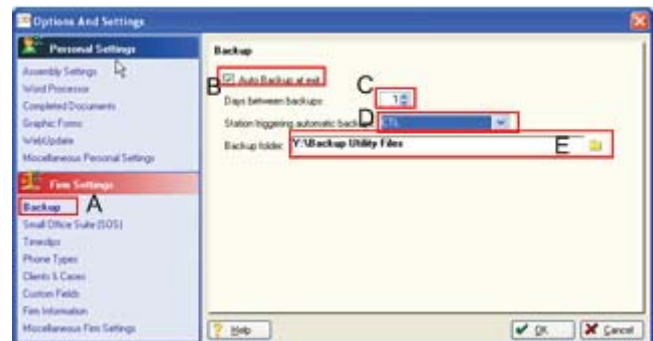


Figure 4 - Make the Appropriate ProDoc Backup Settings

- i. Check the **Auto Backup at exit** box (Figure 4, B).
- ii. Set **Days between backups?** to 1 day (Figure 4, C). This will cause the backup process to run when the last person logs out. Setting this option to 0 would cause the backup process to run the backup up **each time** someone logs out.
- iii. Click the **Station triggering automatic backups** field (Figure 4, D) to trigger a backup when a specific person in your firm logs out. If you choose this option (instead of option ii. above), we recommend that you select someone who is typically in the office daily and among the last to leave each day.
- iv. Select your default back up location (Figure 4, E). In this example the default location is on a network drive

at **Y:\ProDoc Backup Utility Files\**.

v. Click **OK** to save these settings.

#### 4. Choose a Permanent Stage Two Backup Solution

At this point you have wisely set up your backup plan for your ProDoc or SOS. This is certainly better than before but still leaves you vulnerable. The next step is to provide for another back up of this data and all other important files on your computer and/or server, preferably off-site.

You have many choices including small portable devices like thumb drives, external hard drives, burning your files to a CD, etc. All of these are better than nothing but they rely on someone remembering to carry the backup files away from your office and keeping it safe.

A better option may be to use one of the online backup services. You can set up a backup process that runs automatically as often and at whatever times you wish.

The cost varies from free to a small monthly fee. The first backup may take quite some time but subsequent backups will be much faster as they only backing up any files that have changed since the last backup.

If client confidentiality is a concern to you, be sure to select a service that encrypts your data.

If you do not know how to select a backup service, use your favorite search engine to search for a term such as **computer backup solutions for lawyers**. You will find plenty of solutions from which to choose.

#### 5. Other Important Considerations

- A. For the best possible protection, consider purchasing a UPS (uninterruptible power supply) for the computer holding your data. They typically cost less than \$150, and are worth their weight in gold should a power surge occur or the power go out for the computer/server.
- B. Never use **Ctrl-Alt-Delete** to cancel a process. Let SOS and/or ProDoc finish normally.
- C. Never turn the power off on your computer without closing down Microsoft® Windows first. This is typically done by clicking **Start▶ Shut Down** and waiting for Windows to finish shutting down before turning off the power. Windows does not always write all data to disk immediately. It often holds data (including SOS data) in memory and it may not write it to disk until Windows is shut down. Because of this “workstation write-behind cache” practice, an orderly shutdown of Windows is an important practice.

#### 6. Additional Resources

For more help with backing up your ProDoc files, you can call our Technical Support team at 800-759-5418.