Full Back Up or Full Restore

Document #:	3485	Product:	CenterPoint®

The Full Backup option combines the CenterPoint database, local user files (preferences, report favorites and logs), file repository, and Aatrix history files backup into a single process, making it easier to capture all required data in one step and share it when needed.

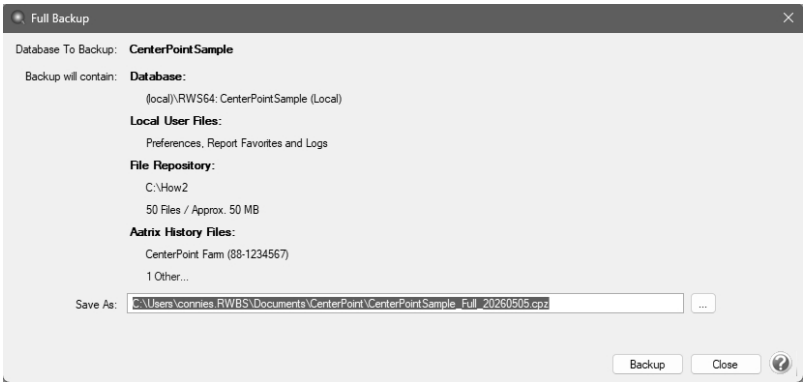
The Full Restore option restores a complete backup including the database, user files/logs, file repository, and Aatrix history from a single backup file. During restore, the system prompts you to place the file repository and Aatrix history files in a designated location and updates preferences to point to the restored files. This helps reduce setup time and ensures files remain accessible without additional configuration.

Full Backup

Full Restore

Full Backup

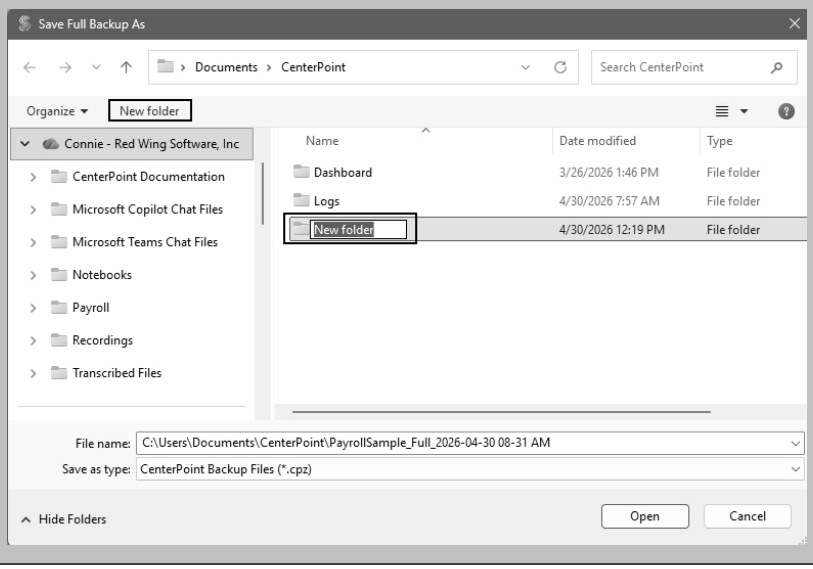
1. Select **File** > **Backup** > **Full Backup**.



2. In the **Database To Backup** box, select the database that you want to back up. The database that is currently open will automatically display.
3. The Backup will contain section lists the following information:
   - **Database** - The name of the selected database to backup and whether it is Local or Remote.
   - **Local User Files** - Indicates that user preferences, report favorites and logs will be included in the backup.
   - **File Repository** - If a file repository is configured, specifies the location, number of files and combined file size.
   - **Aatrix History Files** - Specifies the employer/company in the selected database for which Aatrix history will be backed-up. If there is more than one employer/company with Aatrix history tied to the database, the number of entities is listed with the EIN. Click the **Others** link to display a read-only list of the entities.
4. In the **Save As** box, a default path displays. Click the **... (Browse)** button, select the location on your computer to save the backup file, and then click **Save**. Once you select the path to back up to, the last path used for backing up will automatically display each time you back up.

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Note: If you want to create a new folder to back up to, click **New Folder** , enter a name for the folder, and then click **Open** to back up to the new folder.



- To back up to a flash (thumb) drive, select the drive letter that was assigned to the drive when it was inserted into the usb port on the computer.
- To back up to a server or remote computer, select a location on the network drive (for example, f:\ or g:\, etc.).

Note: The file name for the backup file will be "databasename_Full_YYYY-MM-DD.cpz." The database name plus Full and the date of the backup will make it easy to identify which backup file you may need to use for a restore and it will prevent backups from being overwritten.

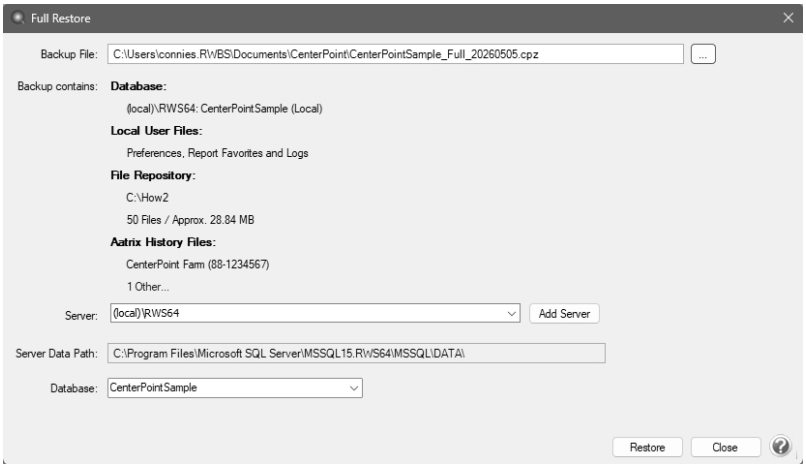
5. Click **Backup**.
6. A progress screen will display. At the *Backup Completed Successfully message*, click **OK**.

Full Restore

Use this process to restore a full backup containing the CenterPoint database, user files/logs, file repository and Aatrix history. This process can also be used to restore a CenterPoint database created from File > Backup > Backup Database and/or user files/logs created from File > Backup > Backup User Files. During restore, the system prompts you to place the file repository and Aatrix history files in a designated location and updates preferences to point to the restored files. This helps reduce setup time and ensures files remain accessible without additional configuration.

1. Select **File** > **Restore** > **Full Restore**.
2. In the **Backup File** box, select the file you want to restore. Click the **... (Browse)** button to locate the backup file . The file name for the full backup file is "**databasename_Full_YYYY-MM-DD.cpz**."
3. The Backup will contain section lists the following information:

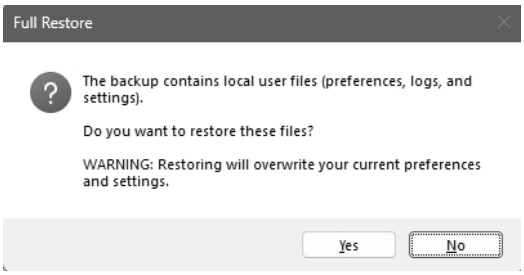
   - **Database** - The name of the selected database and whether it is Local or Remote.
   - **Local User Files** - Indicates that user preferences, report favorites and logs are included in the backup.
   - **File Repository** - If a file repository is configured, specifies the location, number of files and combined file size.
   - **Aatrix History Files** - Specifies the employer/company for the Aatrix history in the selected database. If there is more than one employer/company with Aatrix history tied to the database, the number of entities is listed with the EIN. Click the **Others** link to display a read-only list of the entities.



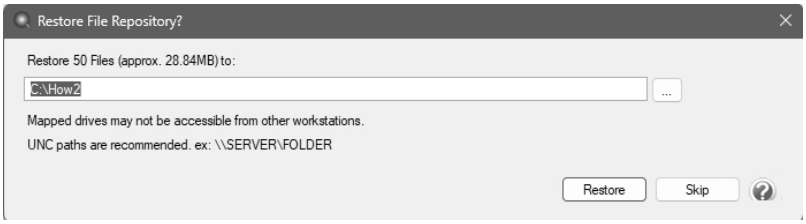
2. In the **Server** box, select the server where your database should be restored. If your database is local, typically, it is recommended that the default local\(RWS)server be accepted in this box.
3. In the **Server Data Path** box, the path that the backup file will be restored to will display.
4. In the **Database** box, the database name that the backup file will be restored to will display.

Note: If you would like to change the name of the database, enter the new name instead of selecting from the list.

5. Click **Restore**. The following message displays.

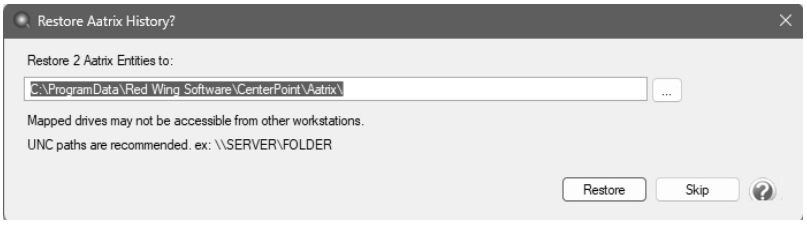


6. If the backup being restored includes local user files (preferences, logs, and settings), click **Yes**. If you do not want to restore local user files, click **No**.
7. If the backup being restored includes a file repository, the Restore File Repository? screen displays. In the **Restore to** box, the path specified in the **Location of File Repository** preference in **File** > **Preferences** > **General** > **File Attachments** displays. This path can be changed to a different location. If the path is changed, the location is also changed in the **Location of File Repository** preference in **File** > **Preferences** > **General** > **File Attachments**.

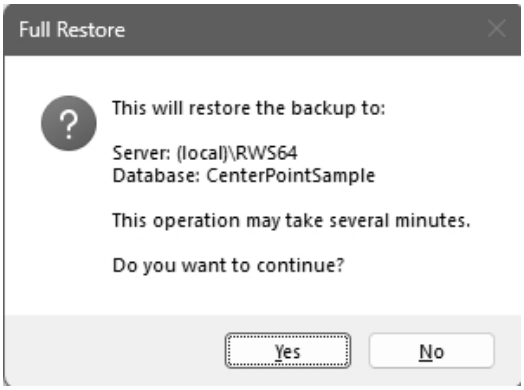


8. Click **Restore** to begin the restoration, or click **Skip** to skip the file repository restoration.
9. If the backup you are restoring includes Aatrix history files, the Restore Aatrix History? screen displays. In the **Restore to** box, the path specified in the **Non-Default File Location** preference in **File** > **Preferences** > **Federal/State Tax Forms** > **Aatrix File Information** displays. This path can be changed to a different location. If the path is changed, the location is also changed in the **Non-Default File Location** preference in **File** > **Preferences** > **Federal/State Tax Forms** > **Aatrix File Information**.

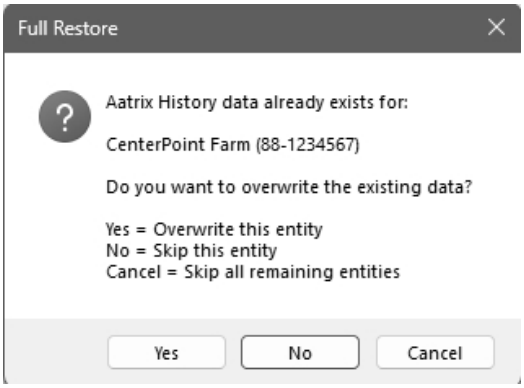
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10. Click **Restore** to begin the restoration, or click **Skip** to skip the Aatrix History File restoration.
11. The Full Restore screen displays confirming the restoration location. Click **Yes** to continue.



12. If Aatrix History already exists, you will be prompted. Click **Yes** to overwrite the displayed entity, click **No** to skip the entity and move to the next (if it exists), or click **Cancel** to skip all remaining entities.



13. At the Full restore completed successfully message, click **OK**.
14. The Full Restore screen will close automatically.

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