

# Backup & Restore Instructions

## Overview

Helper Software™ contains a utility to help you backup and restore your data in case your data becomes corrupted or your hardware fails. The backup utility is also handy for copying your data, should you need to move data from computer to computer or send a database to Technical Support for review or repair.

You can store backup files on your computer's hard drive and/or to removable storage devices (e.g. CD-Rs, DVD-Rs, USB drives). We recommend you do both – hard drive and removable storage (you can backup to hard drive then copy the backup file to a removable storage device). When you create a backup, Helper Software automatically names the backup file based on the date of the backup. That way, you can determine your last valid backup by opening the backup folder and looking for the title of the file with the nearest date. The Restore option allows you to use a backup to recreate your data.

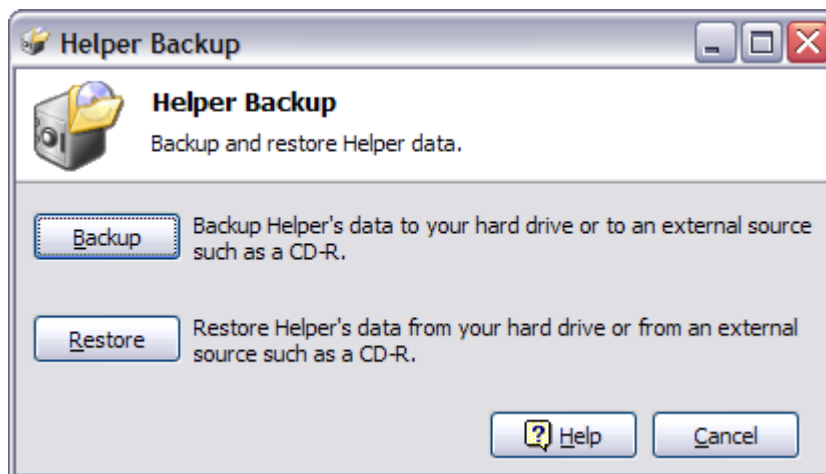
**Note:** If you're backing up or restoring data in a Networked environment, you should only perform these actions on the server, not on the individual workstations.

## Creating a Backup

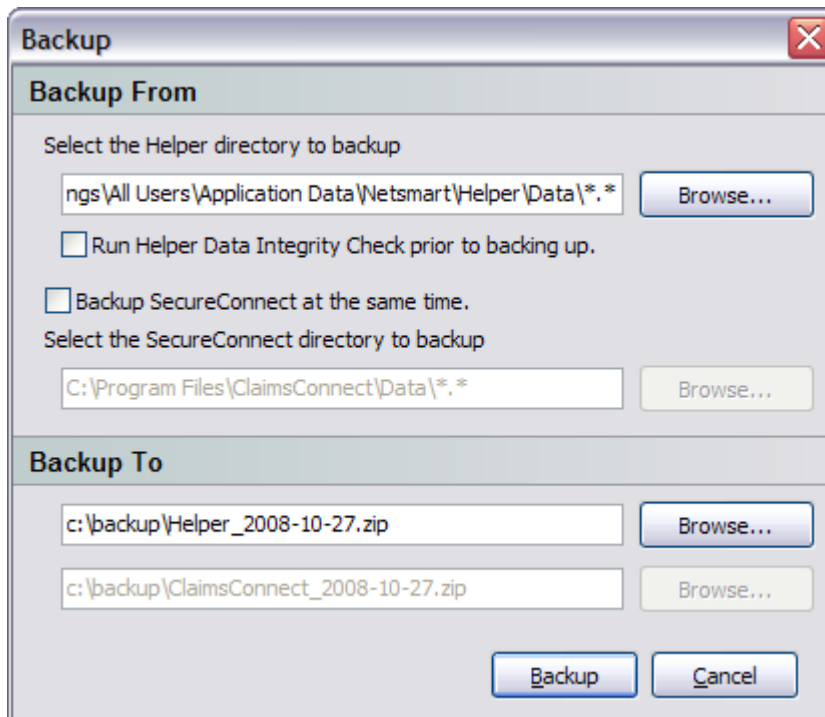
### To create a backup of your Helper Software data

- 1 Make sure the Helper Software application is closed. Then from your Windows desktop go to: **Start | All Programs | Helper Software | Backup** to open the Helper Software backup utility.

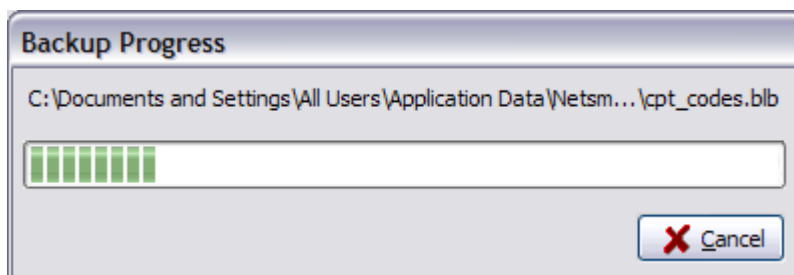
**Note:** To use the Backup utility, you must close Helper Software. If you're running Helper Software in a networked configuration, make sure you close all instances of Helper Software across all workstations.



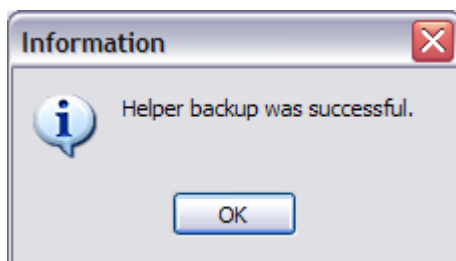
- Click **Backup**. The Backup window displays:



- Verify that the backup location of your Helper data directory is correct (use **Browse** to navigate to an alternate directory). You also have the option to backup ClaimsConnect simultaneously.
- Click **Backup**. A status window displays to show you the file creation progress:



This status window is followed by a confirmation message:

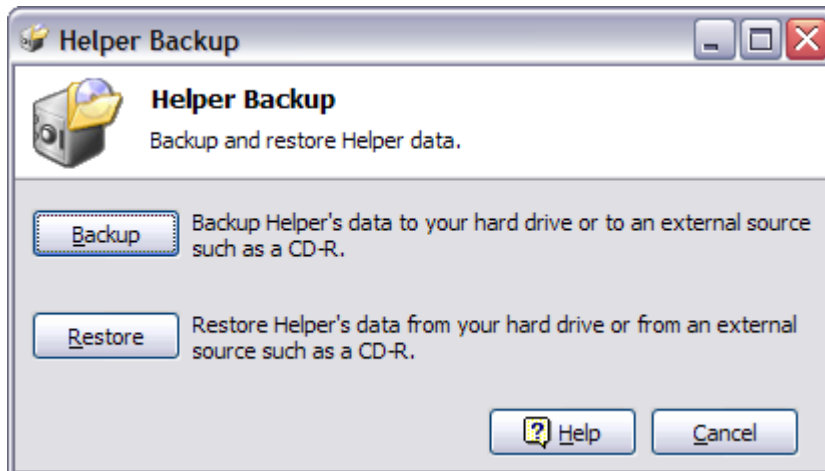


- Click **OK** and then click **Cancel** to exit the backup utility.

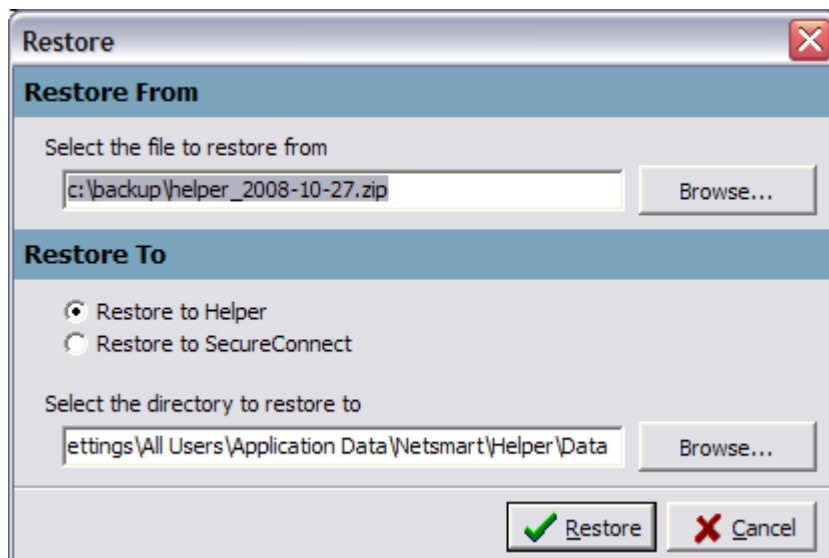
## Restoring from Backup

### To restore your Helper Software data from a backup

- 1 Make sure the Helper Software application is closed. Then from your Windows desktop go to: **Start | All Programs | Helper | Backup** to open the Helper Software backup utility.



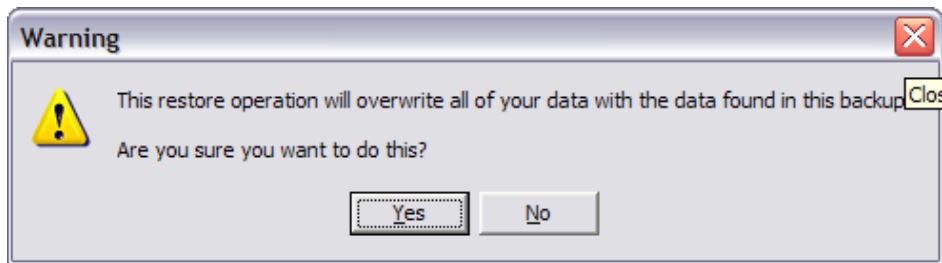
- 2 Click **Restore**. The Restore panel displays:



If restoring from a CD, USB, or External Drive click on the browse button under Restore

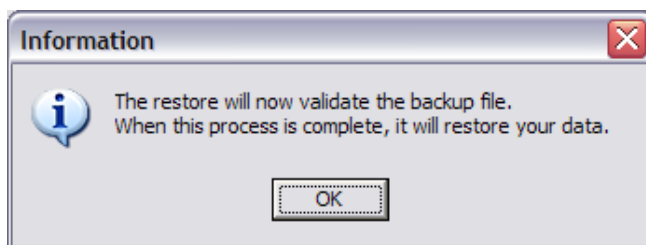
From and proceed with locating your most recent backup. (If you need help please contact Technical Support (800-343-5737 Option 1)

- If this is a ClaimsConnect restoration, you should select **Restore to ClaimsConnect**; otherwise, leave the **Restore To** selection as is. Select a **From/To** path and click **Restore**. A warning message displays:

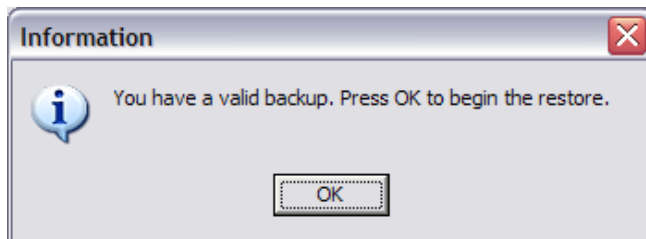


**Note:** Restoring data from a backup will overwrite your current data (database). This action is irreversible.

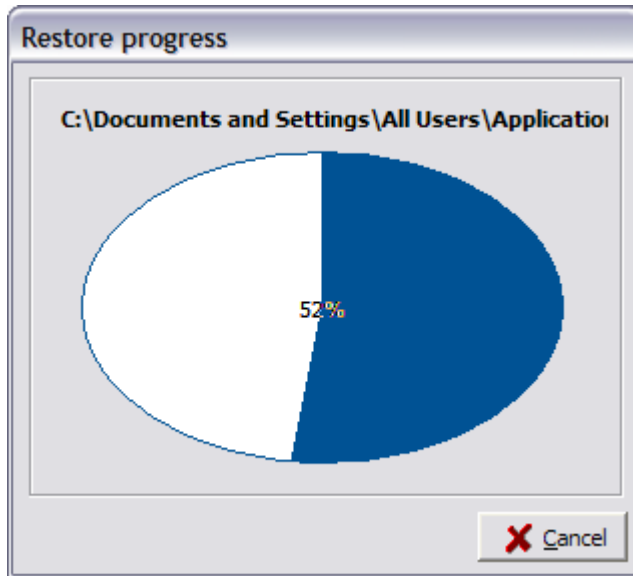
- Click **Yes**. A validation message displays:



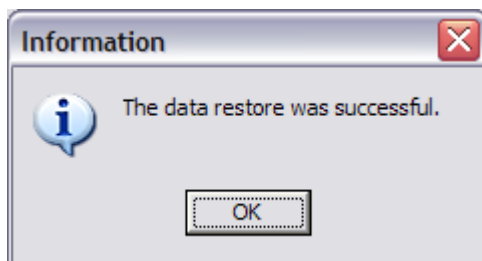
- Click **OK**. This validation message is followed by a confirmation message:



- 6 Click **OK**. The restoration process begins, and you see a progress display:



- 7 When the restoration process is complete, a final confirmation message displays:



- 8 Click **OK** and then click **Close** to exit the backup utility.

Thank you,  
The Helper Team