infoRouter Version 8.0

Administrator's Backup, Restore & Disaster Recovery Guide

Active Innovations, Inc. Copyright 1998 - 2015
www.inforouter.com

© *Active Innovations, Inc.*

Names of all products herein are used for identification purposes only and are trademarks and/or registered trademarks of their respective owners.
Active Innovations, Inc. makes no claim of ownership or corporate association with the products or companies that own them.

Copyright ©1998 – 2015 Active Innovations, Inc.

218 Main Street
Suite 333
East Setauket, NY 11733
USA
Phone: +1-631-218-7600
Fax: +1-631-218-7606
E-mail: support@inforouter.com
URL: http://www.inforouter.com/

This guide is distributed in the hope it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the infoRouter License Agreement for more details.

Contents

1) *How to Backup the infoRouter Warehouse*

2) *How to Backup the infoRouter Database*

3) *How to Backup the infoRouter Application Directory*

4) *How to restore infoRouter*

5) *What to do in case of a server crash*

1) How to backup the infoRouter Warehouse

The infoRouter warehouse contains all the documents uploaded or imported into infoRouter. The infoRouter warehouse resides on the file system.

The infoRouter warehouse houses the following information for each document:

Latest version of the document

All previous versions of the document

Meta information about the document such as description, keywords etc.

The infoRouter warehouse needs to be backed up regularly if infoRouter is being used in a production environment.

To backup the infoRouter warehouse, perform the following:

STOP IIS on the infoRouter application server to ensure no one is actively using infoRouter.

Backup all warehouse components using your preferred backup solution.

You do not need to backup the index server catalog. The catalog can be re-created automatically.

If you are running infoRouter in Distributed mode and you have separated your warehouse across multiple physical drives or servers, make sure to backup all warehouse components at the same time.

Preferably use the same tapes (or other media) to backup infoRouter so that this information would be much easier to access in case you need to restore infoRouter to an earlier instance.

Tip :

The "Compact" feature allows you to get rid of unnecessary versions of documents. Please use the "Compact" function regularly to re-claim valuable disk space and to cut down on backup time.

Active Innovations, Inc. Copyright 1998 - 2015

2) How to backup the infoRouter Database

infoRouter uses a database solution to keep vital meta information about the documents in infoRouter.

Information kept in the inforouter database:

infoRouter Users

infoRouter User Groups

infoRouter Folders

infoRouter Libraries

Document and Folder Security

Custom Property Definitions

Custom Property Data

Workflows

Tasks

and much more

Information kept in the infoRouter database stays in a perfectly synchronized way. There is an entry in the infoRouter database for each document. There are numerous other database tables and objects to help perform the operations supported by infoRouter.

The infoRouter database needs to be regularly backed up in production environments and ***this backup must be kept in synch with the warehouse and application directory backup***.

To backup the infoRouter database, perform the following:

Stop IIS to make sure that no one is actively using infoRouter.

Using the backup procedures for your specific database, perform the backup.

Store the contents of the backup on the same media you used to backup the infoRouter warehouse and the application directory.

Active Innovations, Inc. Copyright 1998 - 2015

3) How to backup the application directory

It is very important to include the infoRouter application directory in your backup plan. The application directory must be backed up regularly in production environments.

The infoRouter application directory houses the following:

Portals Directory

Config Directory

Logs Directory

Custom Search Page Directory

Email Templates Directory

Config Directory

Various Logs

and much more

Each of the directories listed above contain vital information generated during the course of infoRouter operations. New or updated portals are kept in the portal directory, custom search pages created by Search and Category Administrators are kept in the search pages directory and so on.

This information needs to be backed up regularly in production environments.

To backup the infoRouter application directory, please perform the following:

Stop IIS to make sure that no one is actively using infoRouter.

Using your preferred backup solution, backup the entire application directory nightly.

Store the contents of the backup on the same media you used to backup the infoRouter warehouse and database backup.

In cases where the database files are in the application path, please make sure to stop the database services. This will ensure a good backup without interference.

Active Innovations, Inc. Copyright 1998 - 2015

4) How to restore infoRouter

In the event that you need to restore to an earlier backup of infoRouter, you must remember to restore all the components of infoRouter from the same backup media for the given date.

To restore infoRouter to an earlier backup, please perform the following:

Stop IIS.

Restore the infoRouter database

Restore the infoRouter warehouse

Restore the infoRouter application directory

Re-build the full text index by forcing a rescan on MS Index Server for the warehouse directory

Active Innovations, Inc. Copyright 1998 - 2015

5) What to do in case of a server crash

In case you experience a server crash and there is nothing to do but to start all over again with a new server, remain calm and follow these instruction in the order in which they are described. Please feel free to call or email us (support@inforouter.com) so we can help you get through these tasks.

To recover from a server crash, perform the following:

Gather the most recent backup tapes (or other media)

Allocate a new server to install infoRouter. Please make sure that the new server conforms to the specifications and minimum requirements outlined in the *Minimum Server Requirements* document.

Important Note: Make sure that the new server is setup in identical fashion. Same drive letters etc.

Load the OS on to the new server. Make sure to install all the correct OS components outlined in the *Minimum Server Requirements* document.

Install the database solution of your choice (if you are in single server mode) on to the new server.

Create a RECOVERY directory to restore all infoRouter components from tape.

Restore the infoRouter database from the backup media into the Recovery directory

Restore the infoRouter application directory from the backup media into the Recovery directory

Restore the infoRouter warehouse directory from the backup media into the Recovery directory

Install infoRouter onto this new server as if you are starting from scratch. Make sure to follow the instructions in the *infoRouter Implementation Guide*. Install the new instance of infoRouter exactly as you had it on the original server (Same drive letters, same paths etc.).

Now that you have an empty infoRouter instance, we will begin the restore process.

Stop IIS.

Restore the database overwriting the empty infoRouter database

Restore the Application directory overwriting the newly created application directory.

Restore the warehouse overwriting the newly create empty warehouse directory.

Start IIS

Active Innovations, Inc. Copyright 1998 - 2015