

Market Center Data Backup & Restore Guide

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1.0 Overview

1.1 Introduction

In the event of a catastrophic incident, Keller Williams Realty International has established this best practice guide for the backup and restore of your WinMORE, MYOB and other financial data. Because it is not always feasible to move your computer to a secure location when an emergency occurs, data can be lost and irretrievable. To prevent data loss from happening, this guide will detail the procedure to backup and restore your production and financial information.

A backup is nothing more than a copy of your data. The more often you backup and the more locations this information is stored the better prepared you will be in reestablishing your business after a loss event occurs.

1.2 Backup

Please complete a full **financial data** backup every Monday through Saturday. Listed below are the contents of what should be contained in your backup:

- C:\WinMORE2 folder (Includes application and data)
- C:\Premier2006*.MYO files (Company file)
- C:\Premier2006\MOREDEPS folder. (Company deposits)
- C:\Premier2006\Spredsht folder. (Includes Accthist.xlt file)
- C:\RealBroker\Data folder. (used by Canadian MCs only)
- Any other financial docs or data files used by the MC (i.e. forecasting workbook, local MC reports, etc)

After performing the backup, take the backup home with you or to a secured location. In the event of a catastrophe at the office, **this will be the only current copy of your financial data.**

REMEMBER NOT TO LEAVE YOU BACK DEVICE IN THE OFFICE!

Each MC should have two separate backups. While one backup stays off site for a week (Backup A), the other (Backup B) will be brought home daily or to a secure location that is DIFFERENT from the location of Backup A. One suggestion is to keep the weekly backup with the OP or TL while the daily backup is kept with the MCA. Just remember to swap out the backup devices every week.

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Backup Media

There are a variety of ways to backup your financial data. These include (but are not limited to):

- External Hard Drives
- Tape Drives
- CD/DVD
- External Server
- Flash Drive (for example: thumb drive, keychain drive)

Keller Williams Realty currently requires the '**ABSplus**' external hard drive combined with the '**BounceBack**' software for new MCs.

It is also required that two of these backup systems be used in order to have your data in more than one external location.

Previous KW backup requirements' included the use of a tape backup or other external hard drive(s) for this purpose and are mentioned below. Though these solutions are sufficient for existing MCs and do not need to be replaced, the required solution for new MCs is the ABSplus external hard drive using the BounceBack software.

Redundant backups are also a good idea and recommended. When it comes to your data and your business, you can never have too many copies of your most valuable files. Whenever significant changes or additions are made to your financial data, it is good practice to perform a backup.

For those MCs which have a client/server environment that uses a network version of WinMORE, contact your on-site technical coordinator to ensure the server is using appropriate backup methods and frequencies.

1.3 Restore

Backup Verification: Once a month you should verify your backup was successful by restoring your financial data to an alternate location and checking that the information was backed up correctly.

Restore Process: In the event that you need to restore data (loss event occurs) make sure your hardware and operating system are setup first. Contact your computer manufacturer or on-site technical coordinator for additional help.

- Operating System (OS): You will need to use the disks that accompanied your computer when it was purchased or contact the manufacturer.
- Keller Williams financial applications:

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- WinMORE: A full financial data backup includes the WinMORE application as well as the M.O.R.E. data. Once a restore is completed you will be able to operate WinMORE; however, any desktop shortcuts will need to be re-established.
- MYOB: Reinstall the application and bring over the Company file (*.MYO) as well as the 'MOREDEPS' and 'Spredsht' folders from the backup.
- Real Broker (Canadian MCs only): Reinstall the application and bring over the 'Data' folder from the backup.
- FTP: Make sure that the WS_FTP program is installed so you can connect to the KW FTP area in order to transmit your monthly reports.
- Other financial documents: In order to use the KW Financial Statement, Account History, or MC Forecasting files you will need to have a current version of Excel installed prior to restoring these files. The COA document will need Adobe Acrobat installed.

2.0 Backup Procedure

Follow the installation instructions provided by the manufacturer of the backup system. If you purchase a preconfigured system, this should be completed for you by the computer manufacturer.

NOTE: It is a good idea to label each backup system (for example: Backup A and Backup B) to avoid confusion between the two systems.

2.1 BounceBack

2.1.1 Setting up the Backup

1. Open the BounceBack program.

The **BounceBack Control Center** will appear.

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2. Click the **Backup** button on the main screen, and then the **Yes** button on the **Backup Wizard** screen.



The **Backup Set Selection** screen will appear.

3. Click the **New** button, since this is the first time, but future backups will require you to click the **Backup** button.



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4. Click in the corresponding radio button to select the **Let Me Choose** option, and then click the **Next** button.



The **Select Files and Folders to Backup** screen will appear.



5. Click on the **Local Disk (C:)** option to expand the drive, and then click the **Next** button.

The **C:** (drive) screen will appear.

6. Click on the first file and/or folder you want to backup to select it, and then click the **Next** button.

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Make sure you backup these items:

- C:\WinMORE2 folder
- C:\Premier2006 folder. This will include any Chart of Accounts, Financial statements, or Account History worksheets.
- Other financial documents. Such as any forecasting worksheets or local MC reports.

The **Select Destination** screen will appear.

7. Click on the **ABS** drive to select it, and then click the **Next** button.

The screen **Backup Item Selection** screen will appear.



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8. Click the **Add** button to add more files and/or folder if needed, and then click the **Next** button. (If you do not need to add more files, simply click the **Next** button.)

The **Select Files and Folders to Backup** screen will appear.
Repeat Steps 5-7 to continue adding files/folders.



*HINT: The **Start Over** button allows you to redo your backup selection.*

9. Click the **Next** button after you have added all the files/folders you want to backup.

The **Backup Set Schedule** screen will appear.



10. Click in the radio button to select the **I will Manually Launch My Backups** option, and then click the **Next** button.

The **Backup Set Summary** screen will appear.

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11. Choose the name for the backup, type it in the **Backup Set Name** field, and then click the **Accept** button to save your backup.

You are now ready to perform the backup function. Continue to section 2.2.2 to begin your backup.

2.1.2 Backing up your Data

1. Open the BounceBack program.

The **BounceBack Control Center** will appear.



2. Click the **Backup** button on the main screen of BounceBack Control Center.

The **Backup Set Selection** screen will appear.



3. Click on your Backup Set Name to select it, and then click the **Backup** button.

When the Backup Complete screen appears, your backup was successful.



4. Click the **OK** button to return the main screen on the Control Center.

2.2 Yosemite Tape

Follow the manual provided by Yosemite for backup practices when using the backup system.

NOTE: Keller Williams Realty International recommends you maintain 12 tapes (2 sets of six) that are labeled Monday through Saturday, and a cleaning tape. Keep in mind that most tapes have a tape life of

24-36 months depending upon usage, so you may need to keep extra tapes on hand.

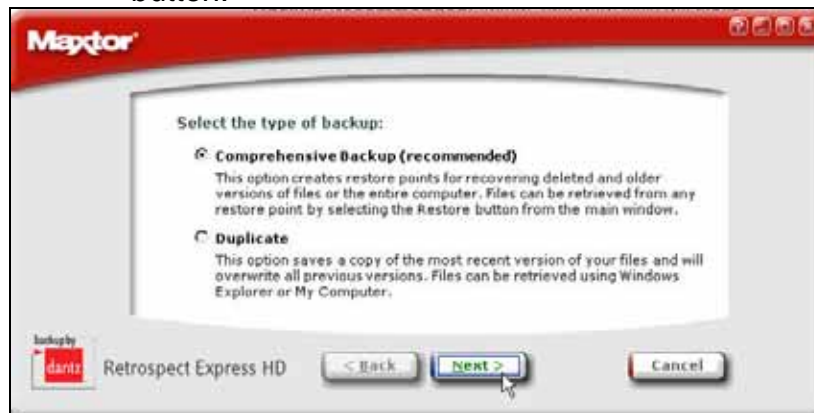
2.3 Maxtor OneTouch / Retrospect Express

2.3.1 Setting up the Backup

1. Open the Dantz Retrospect Express program.
2. On the main screen, click the **Setup** button.



3. The **Select the type of backup** screen will appear.
4. Click in the radio button to select the **Comprehensive Backup (recommended)** option, and then click the **Next** button.



The **What do you wish to backup** screen will appear.

5. Click in radio button to select the **Let me choose specific files and folders** option, and then click the **Next** button.

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The **Select files and folders** screen will appear.



6. Click in the corresponding box of the file and/or folder you want to select.
 - C:\WinMORE2 folder
 - C:\Premier2006 folder. This will include any Chart of Accounts, Financial statements, or Account History worksheets.
 - Other financial documents. Such as any forecasting worksheets or local MC reports.

The **Select the disk(s) to store your backups** screen will appear.



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- Click in the box corresponding to the Maxtor OneTouch / Dantz Retrospect disk, which in most instances will be on your E: drive, to select where you want the backup to reside, and then click the **Next** button.

The automatic backup screen will appear.

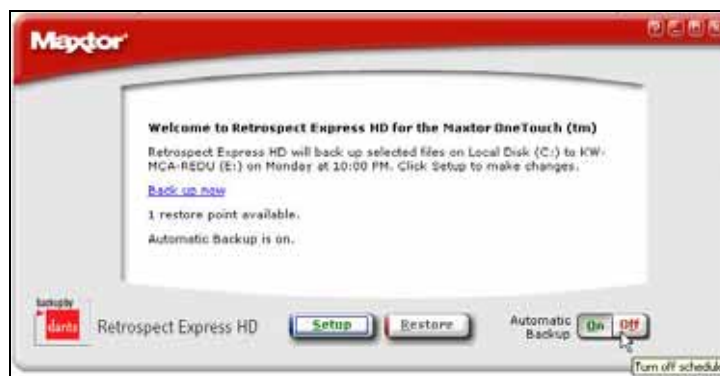


- Click the **Finish** button to return to the main screen and exit setup.

OR

If you want, you can create an automatic backup, which will run according to the preferences you set, by clicking in the box corresponding to the day of the week and by inserting the time in which you want the automatic backup to run.

To turn off this feature, click the **Off** button located on the main screen.



Make sure the screen displays "**Automatic Backup is off**".

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2.3.2 Backing up your Data

1. Open the Retrospect Express program to begin the backup.
2. Click the **Back up now** link on the main page.
OR
You can also start a backup by pressing the **OneTouch** button on your Maxtor drive (if it is set up to back up), or by right-clicking the **Retrospect Express HD** icon in the system tray and choosing "Back up now".
3. The backup will initiate and when finished, the status will display as complete.

3.0 Restore Procedure

3.1 BounceBack

1. Open the BounceBack Control Center.
2. Click the **Restore** button.

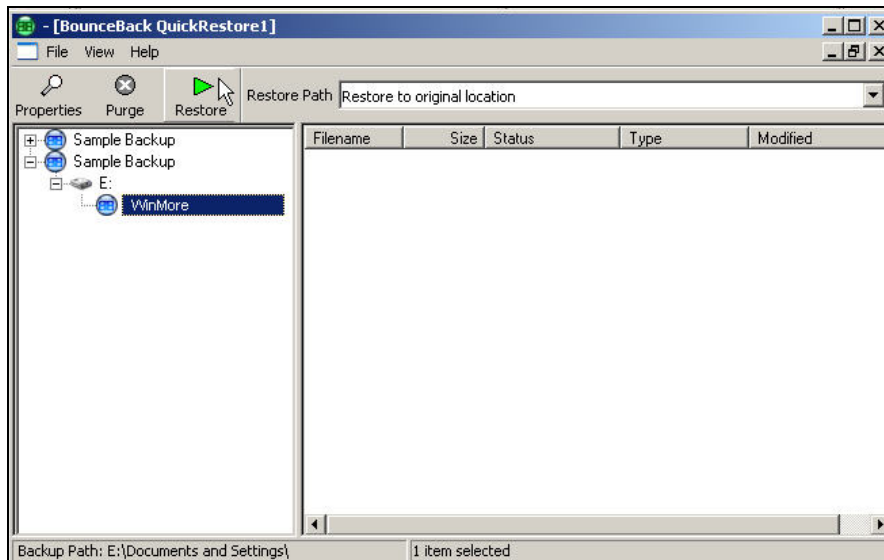
The **Restore Wizard** screen will appear.

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3. Click the **Yes** button to begin the QuickRestore process.

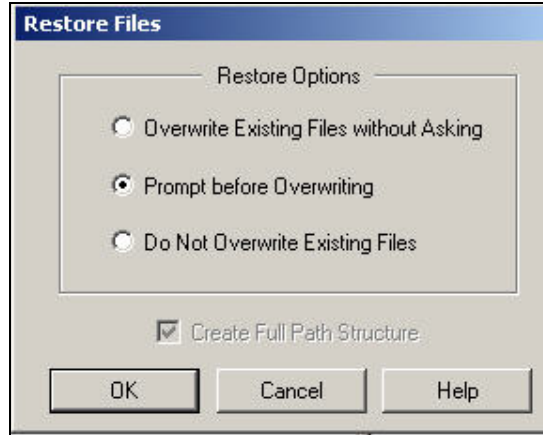
The **BounceBack Quick Restore** program will then open.



4. Click on the name of the backup to highlight it, and then click the **Restore** button located in the upper left side of the screen. Hint: You may need to click on the + button to expand the drive to view the file name.

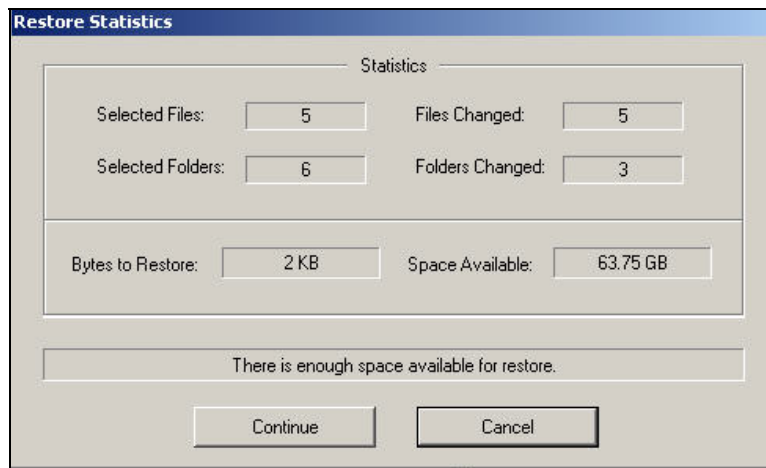
The **Restore Files** dialog box will appear.

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5. Click in the radio button to select your Restore Options, and then click the **OK** button.

The **Restore Statistics** dialog box will appear.



6. Click the **Continue** button to begin the restore process.

The **Restore Totals** screen will display when the restore process is finished.

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7. Click the **OK** button to exit the BounceBack QuickRestore program.

3.2 Yosemite Tape

Follow the manufacturer's manual when using the restore feature.

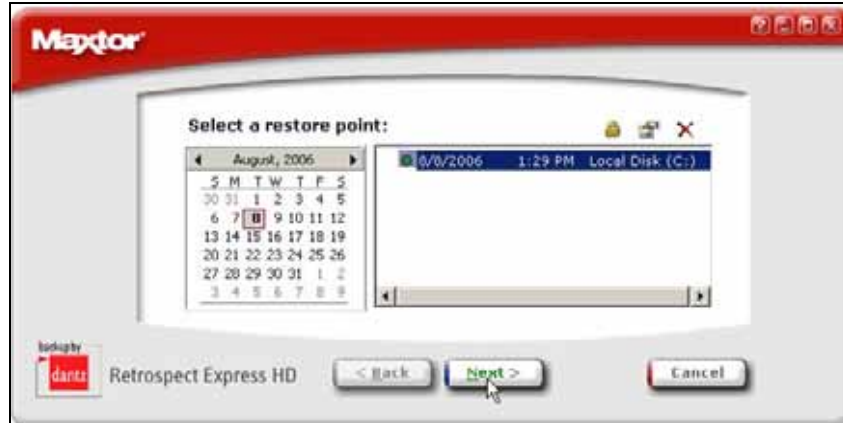
3.3 Maxtor OneTouch/Retrospect Express Software

1. Open the Retrospect Express program.
2. Click the **Restore** button on the main screen.



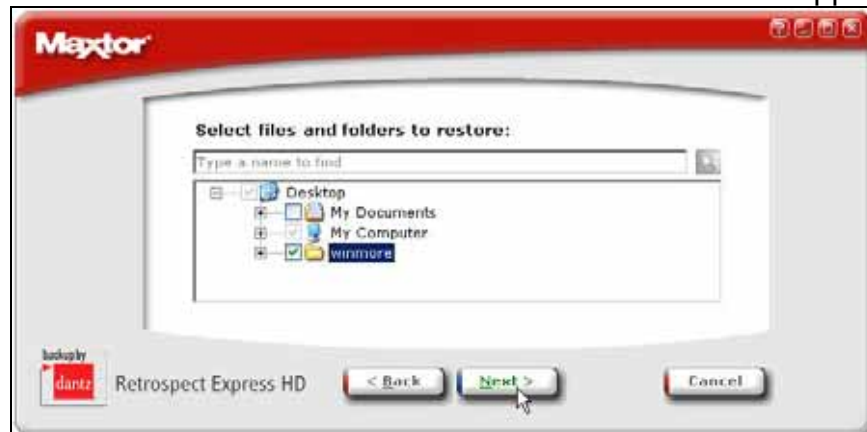
The **Select a restore point** screen will appear.

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3. Click on the restore point to select it, and then click the **Next** button.

The **Select files and folders to restore** screen will appear.



4. Click in the box to select the files and or folders you want to restore, and then click the **Next** button.

The **Restore your files to** screen will appear.



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5. Click on the radio button to select the location where the restored files will reside, and then click the **Restore** button to begin the restore process.



The system will begin the restore process.