Backup - TDO data backup guide

891 TDOKB1 September 29, 2023 Help Ribbon Menu, Setup, TDO software, Troubleshooting
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Overview

The TDO Backup Utility is a great tool to backup your data and images, with the capability to restore that data if needed

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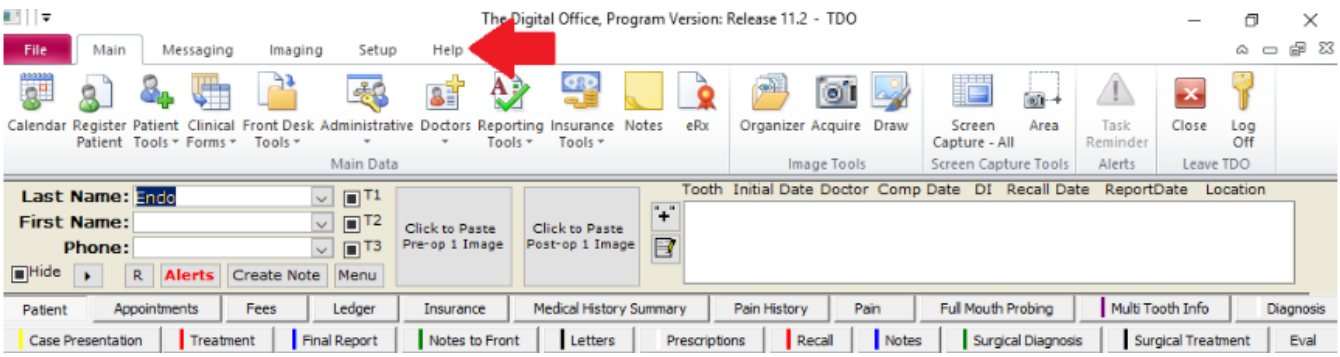
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Checking TDO Backup Log

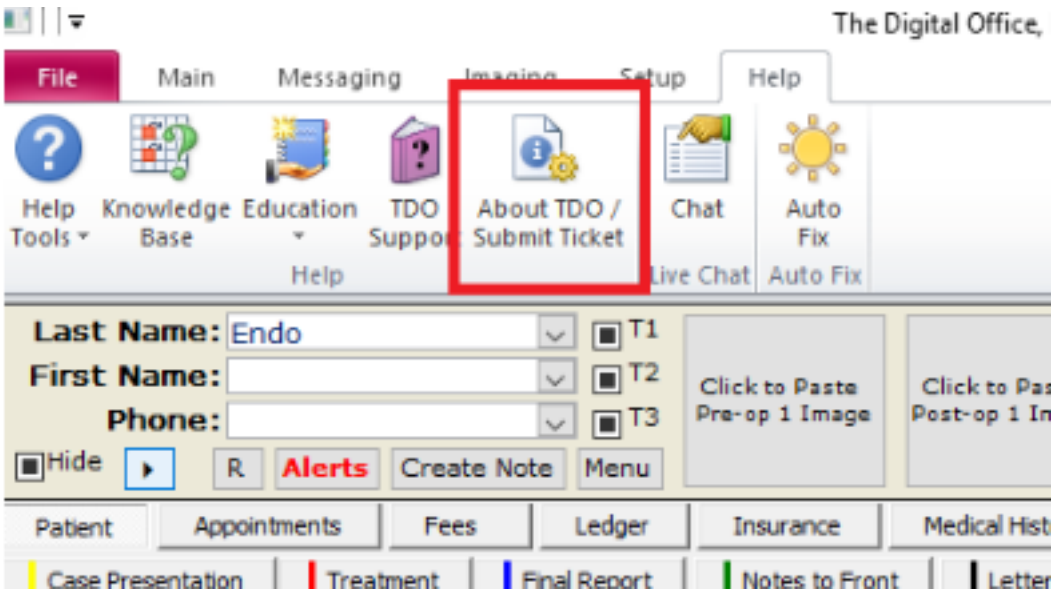
Detailed Instructions

The following directions will show you how to verify the status of your backup in TDO Version 12. To verify your backup in TDO Version 11, the instructions are the same but the onscreen location will be different.

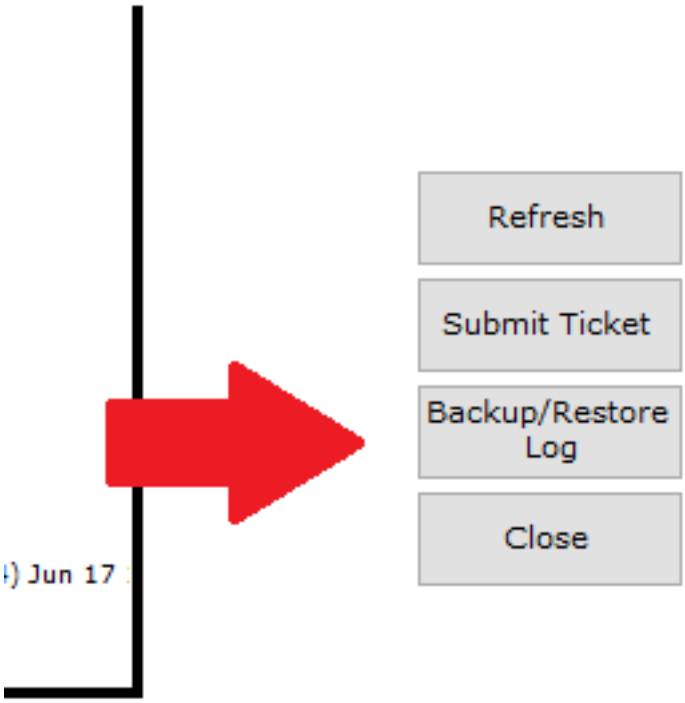
1. With TDO open, click the Help button at the top of the program.



2. Select About TDO / Submit Ticket

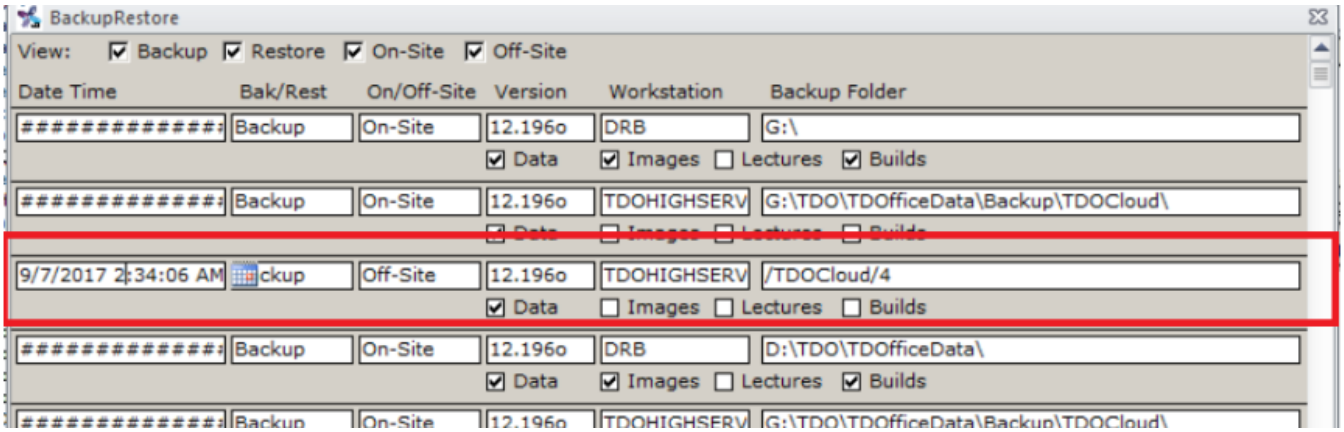


3. In the lower right hand corner of the About TDO window that pops up, select the Backup/Restore Log



4. When the log comes up, it will show you the date the backup ran, whether it was on or offsite, what workstation it ran on, and the location of the backup folder.

If you are attempting to verify a backup run by TDO Cloud, look at the example that is boxed in red as it shows how an offsite backup will appear in the log. Notice that the Backup Folder is listed as /TDOCloud/4.



Configuring a TDO Backup

Ensuring that a daily backup is configured using the TDO Backup utility is absolutely essential. It is certainly acceptable to have other backup solutions (perhaps suggested by your IT) in place, but it should not be an alternative to the TDO Backup. A daily backup is ran with the TDO Backup Utility is the only certain way of ensuring that in the event of a server crash, TDO data can be restored.

Deciding Where to Configure the Backup

NOTE: TDO does not recommend backing up to the local drive on your server because if your server crashes, your backup data will be lost with it.

The two backup locations typically configured at a TDO office are an Admin Backup Machine and a backup on an external hard drive.

Admin Backup Machine - Machine in the office that has 2 hard drives, runs a full TDO backup automatically every night. This machine would serve as the temporary server in the event of a failure for the time the server is being repaired/replaced.

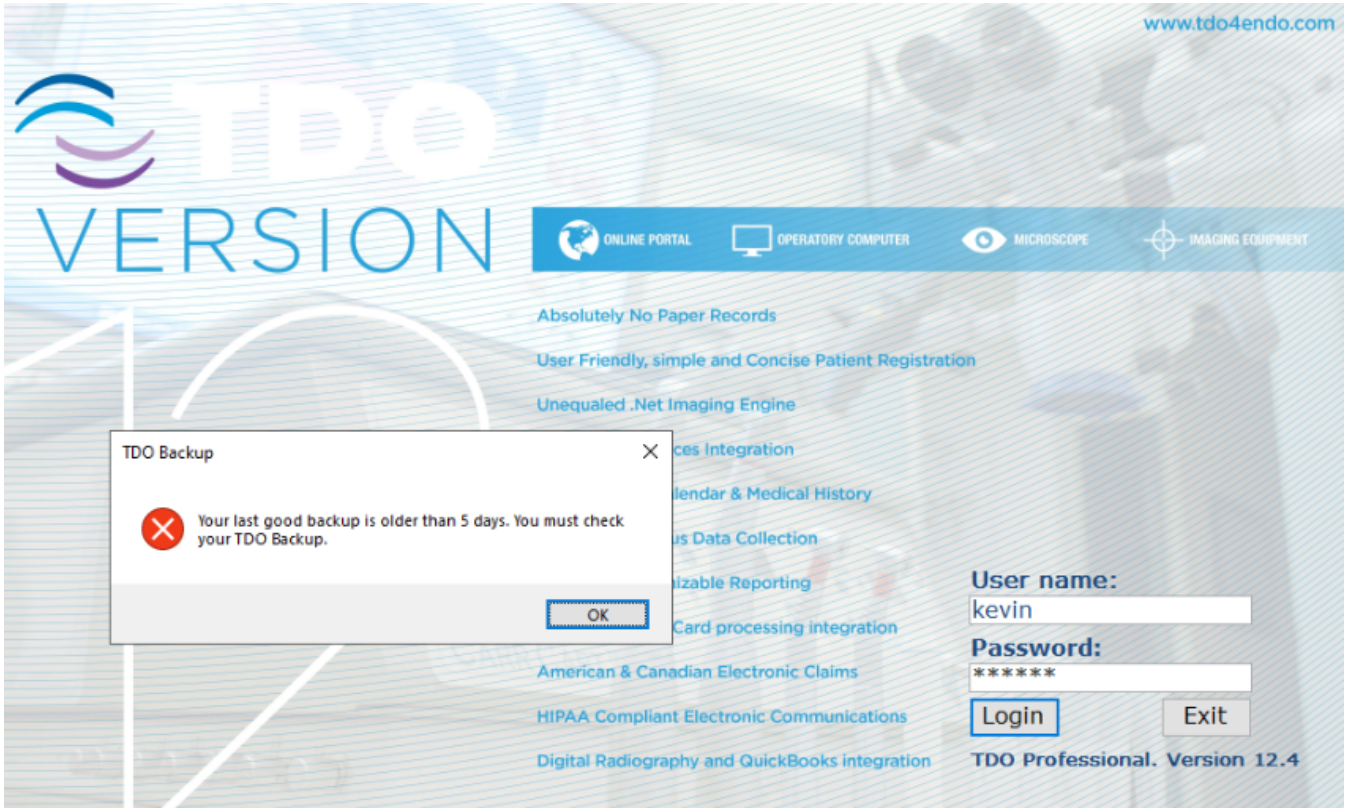
External Hard Drive - (iOmega, Western Digital Passport, etc): Has a backup running nightly. This drive would come home with you daily. In the event of a catastrophe (office burns downs, floods, etc) you could use the data on the external drive to restore to another computer to access your data.

Replicated Offices - **An onsite local backup at the primary location will be sufficient to store data for all of your locations. In the satellite locations, it is recommended to do a data only backup to a workstation in that location. Please be sure to have them running in the "task scheduler" at separate times.**

OPTIONAL

TDO Cloud Backup - 7 days worth of TDO Server Data backups and all X-rays. Comes with TDO Cloud Services. This should not be considered your primary backup but a secondary option. A local backup is required.

Troubleshoot



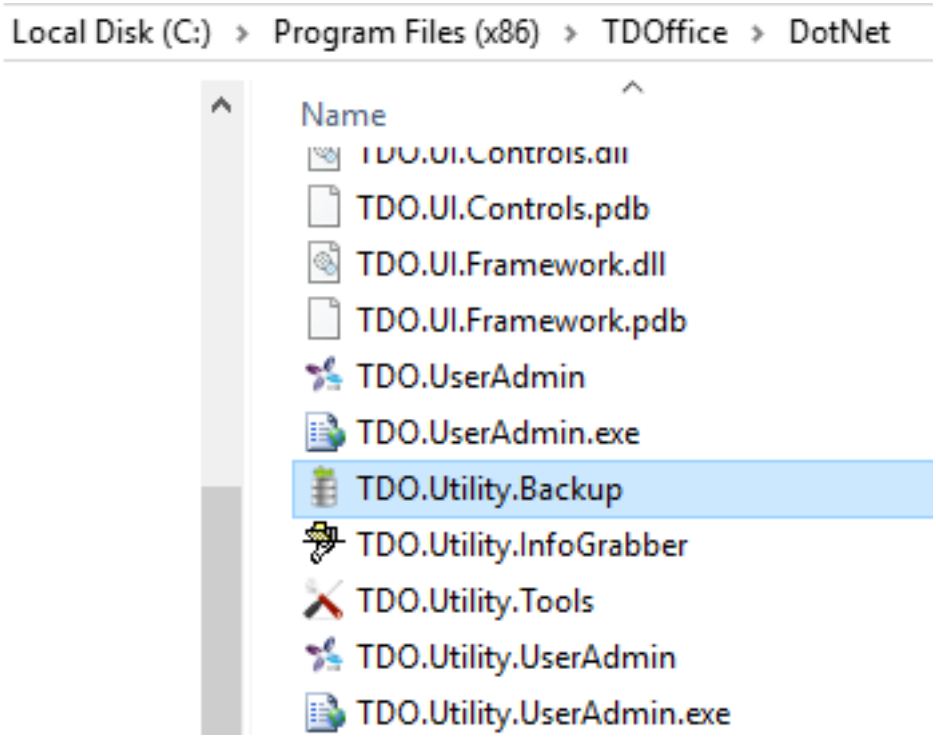
When this notification shows please run a local backup from the computer that typically runs your backup

Detailed Instructions

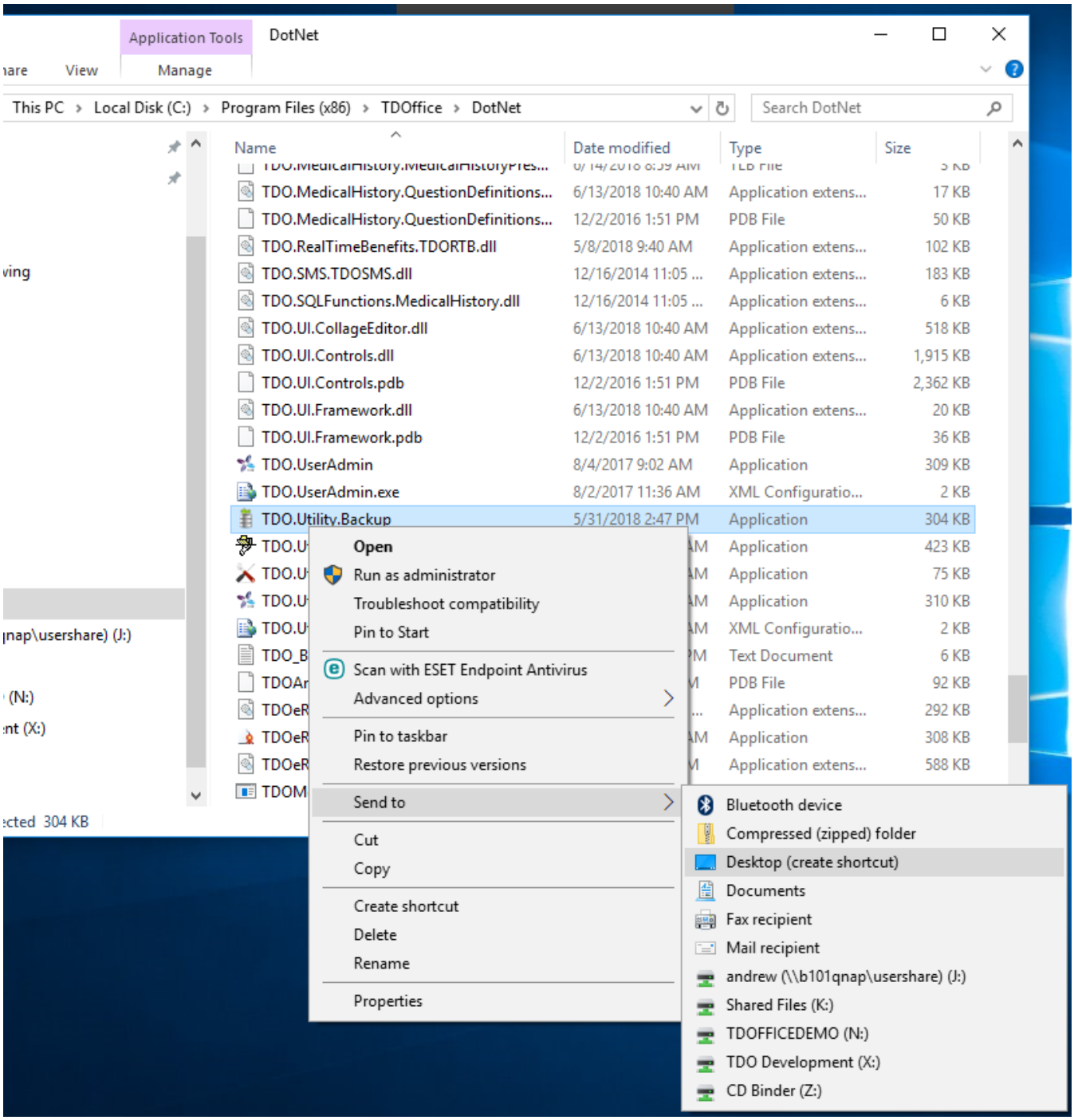
Configuring the TDO Backup User Interface

Browse to the DotNet folder of the local installation of TDO. This is normally located in C:\Program Files (x86)\TDOffice\DotNet

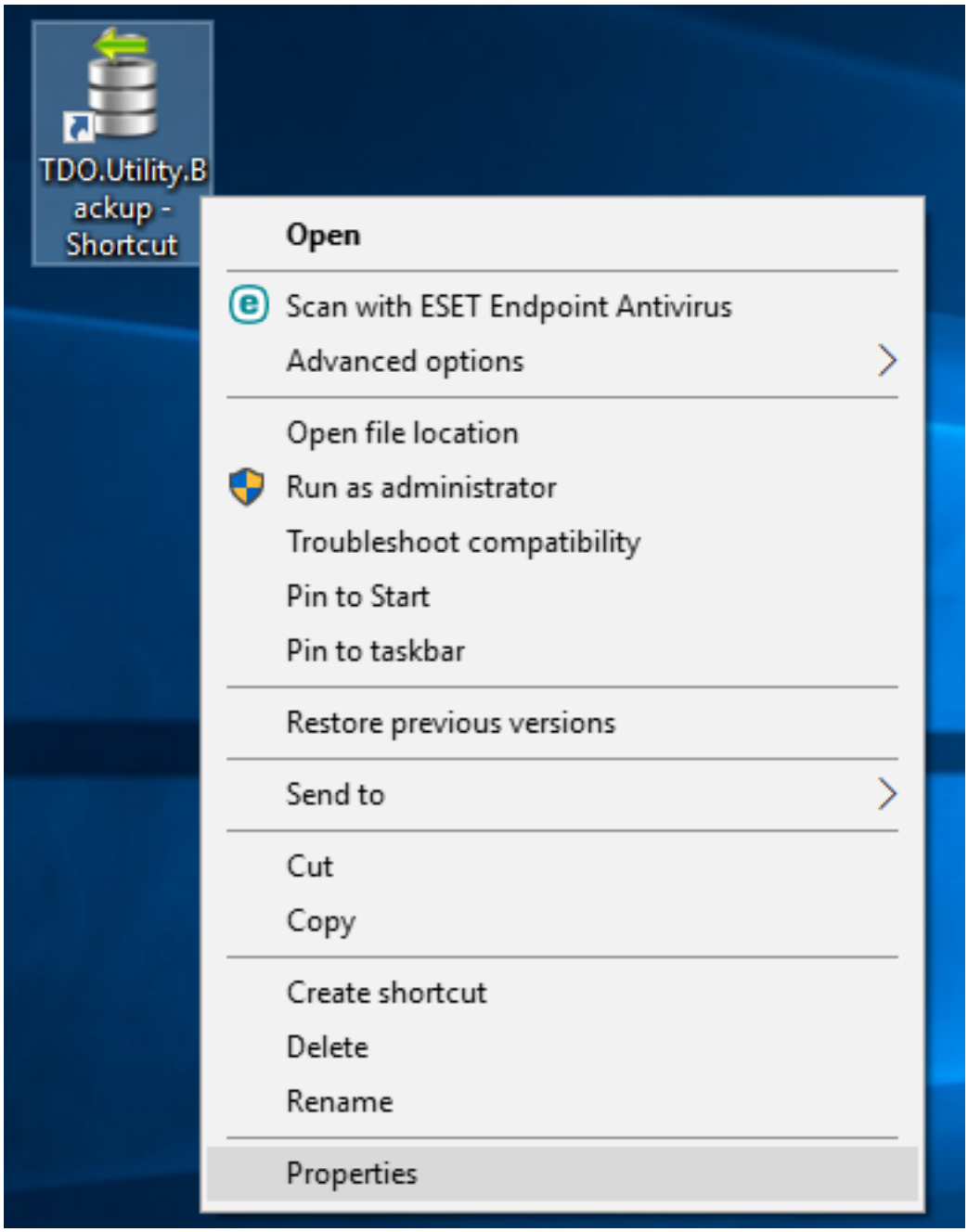
NOTE: The version 11 backup utility is located in the Utilities folder and is called Backup.exe. This is generally located in C:\Program Files (x86)\TDOffice\Utilities



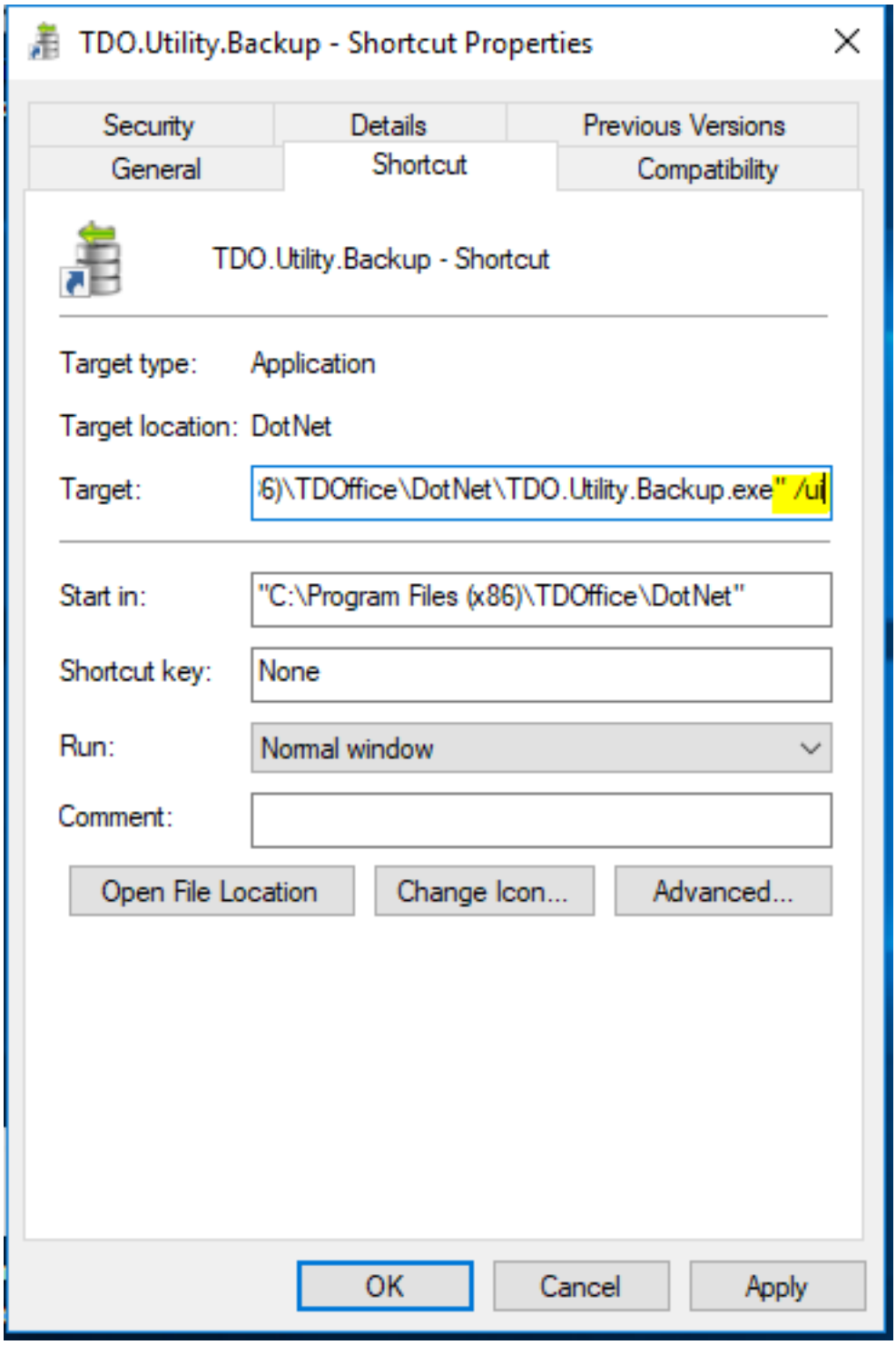
Right-click on the TDO.Utility.Backup (Backup.exe in Version 11) file and Send to the Desktop as a shortcut.



Right-click on the Backup icon on the Desktop and choose Properties.

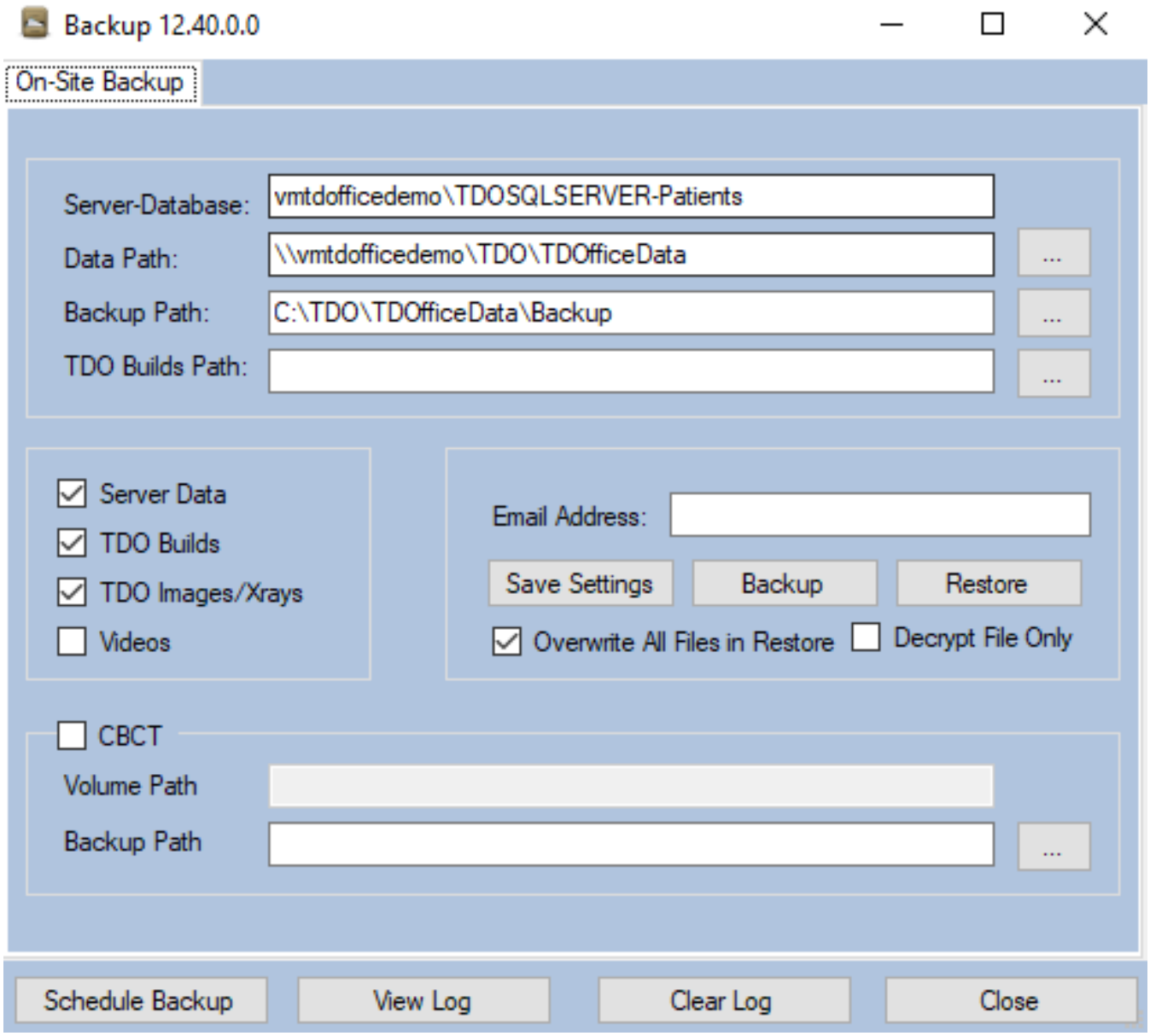


In the target field, following the path to TDO.Utility.Backup.exe, hit the spacebar and type /UI (make sure to include the space between .exe and /UI or it will not work).



Click Apply and then OK.

TDO Backup User Interface



Server-Database - is the name of your SQL Server and your database.

Data Path - is the server folder where you store your TDOfficeData. This field will populate automatically based on the Data path where TDO is installed on the server. Do not change it.

The Backup Path - is where you want to save your TDO Backup. Remember to always store your backups on a dedicated hard drive used for TDO data only (For instance, the data drive on your Admin workstation).

The TDO Builds Path - is where you TDO setup/installation files are stored. These files should be stored on the server in the TDO directory in a folder called TDO Builds.

Select the information you want to include in the backup: Server Data, TDO Builds, TDO Images/Xrays,

Lecture Images or Videos.

From V11- The Offsite Backup tab is no longer used. If there are issues with the Offsite backup, please call TDO.

X-RAY BACKUP - TDO only backs up the x-ray images that have been imported into TDO's own patient database.

Scheduling the TDO Backup

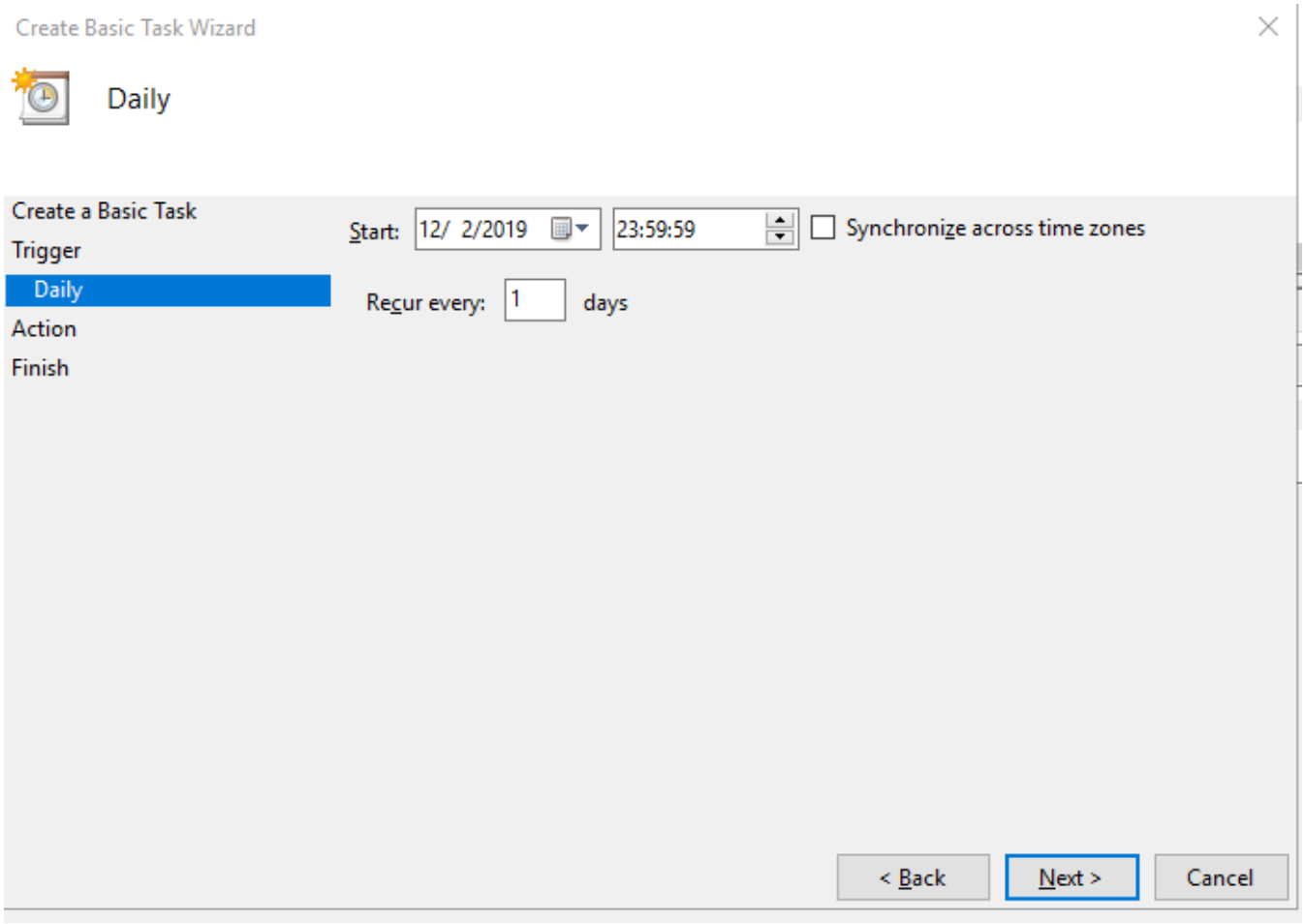
The TDO Backup is scheduled using Windows Task Scheduler.

Open Control Panel > Administrative Tools > Task Scheduler.

Click Task Scheduler Library and on the right-hand side, click Create Basic Task.

Name your task TDO Backup and then click Next.

In the Task Trigger, make sure to set your backup to run Daily and then click Next.



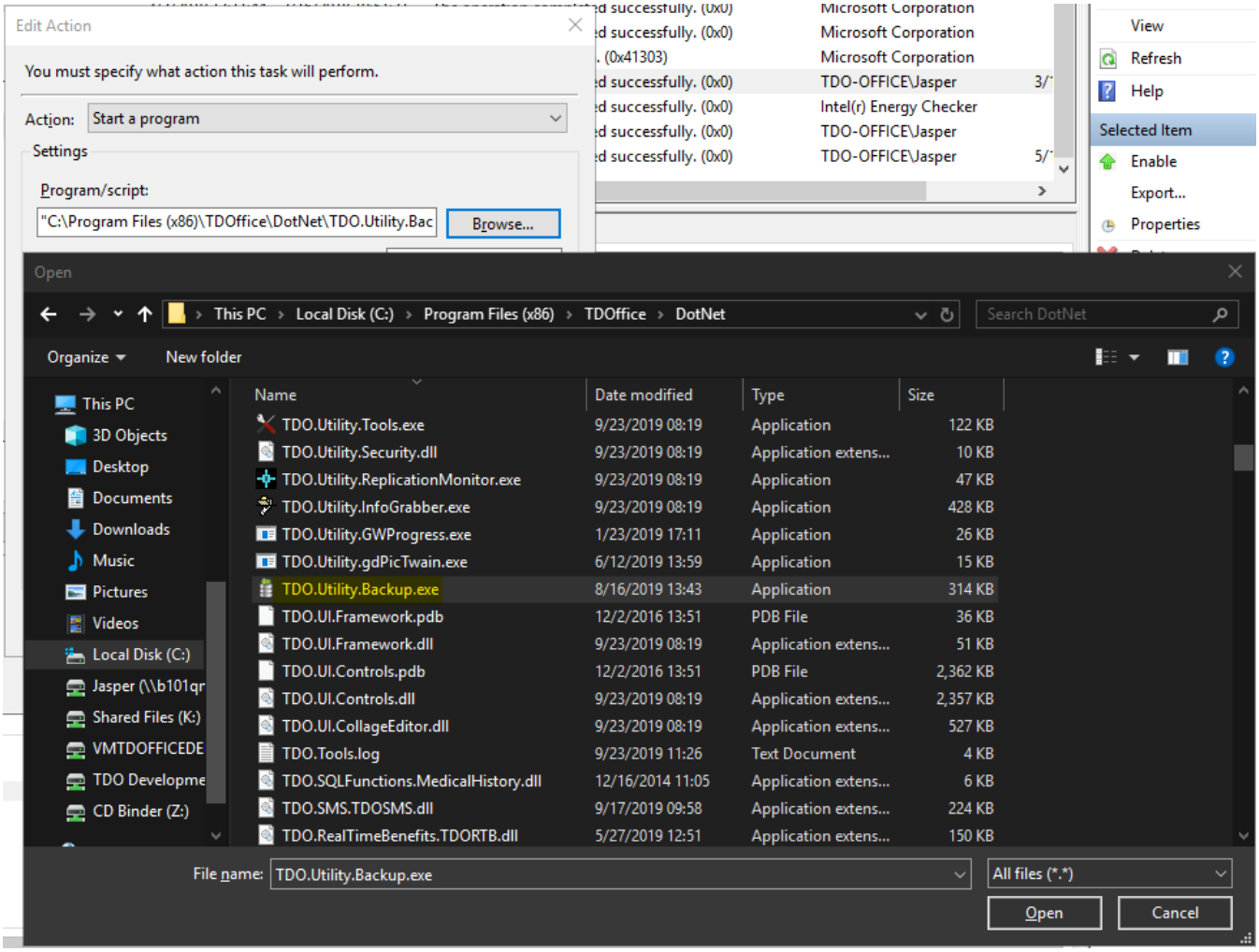
It will then have you set the time the backup will be run. Make sure it is set to a time that the office will never be working. Typically, the middle of the night is best, as the backup could take several hours to

run.

For the Action, choose to Start a Program and then click Next.

Click Browse to find the TDO.Utility.Backup.exe or Backup.exe file in the TDOffice folder depending on your version of TDO. Do Not Select the Task to Run from the Desktop ICON

It should be selected to run from "C:\Program Files (x86)\TDOffice\DotNet\TDO.Utility.Backup.exe"

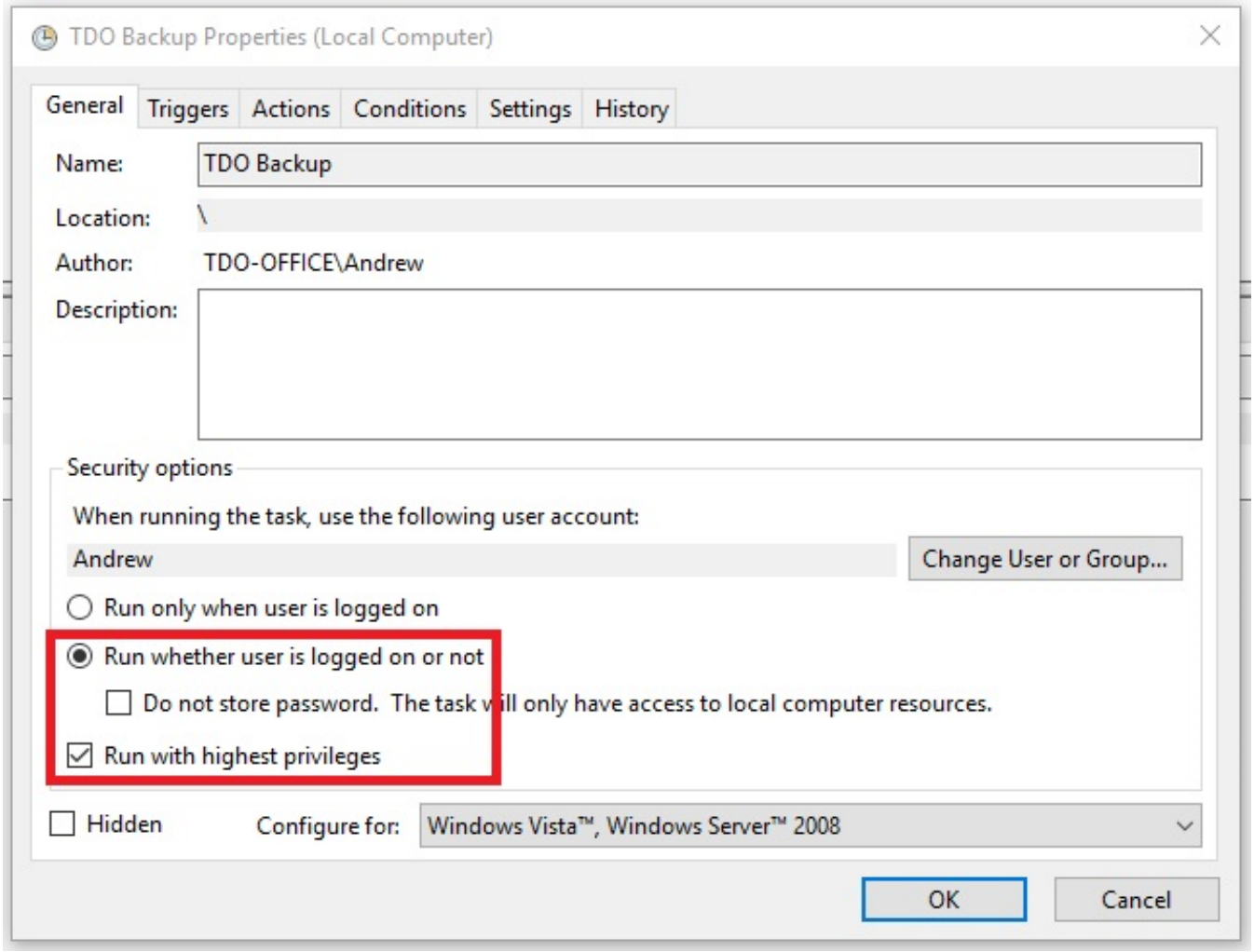


Click Next.

Click Finish. Your backup is now scheduled to run automatically.

Once the backup is scheduled to run automatically, right-click on the task, and select Properties.

On the Properties screen, select Run whether the user is logged on or not, and Run with the highest privileges.



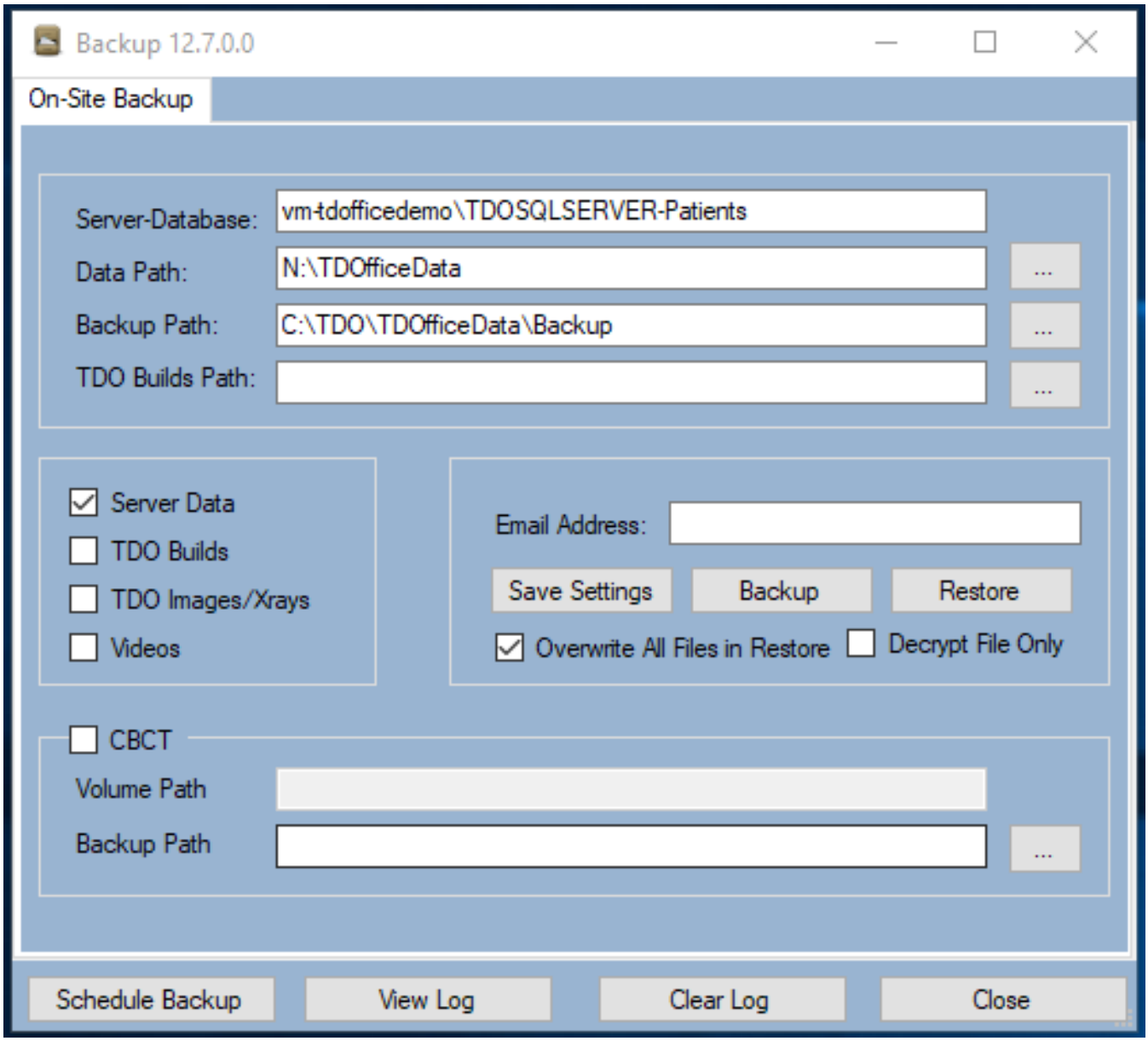
NOTE: a Windows username and password will be required to finalize changes to the scheduled task. This user will need the appropriate permissions to run the task and will need to have access to the shares on the server

Your TDO Backup is now set up. To learn about restoring from a TDO Backup, click here.

Restoring From a TDO Backup

Restore is the process of copying data from your latest backup to your current server data. You would follow the restore procedure in the event that your server crashes or if you wish to restore your data to a laptop to function as a standalone out of the office. In the event that your server crashes, follow the steps listed

To restore, you must have a recent backup of your data because the restore process will replace your current data with the data from the last backup. To restore, open the “Backup TDO” shortcut on the desktop and make sure the following fields are correct:



1) The **Server-Database** is the name of your SQL Server and your database. This is the SQL Server you are connected to. When you press the "Restore" button, your latest backup (in the "Backup Path") will be copied into this server database. To restore more quickly, only check the box for "Server Data." Restoring only the "Server Data" will take about 15 minutes. After the server data restore is complete, only check the box for "TDO Images/Xrays" and then click "Restore" again. Restoring the images will take longer than restoring the server data. This may take 30 minutes or more, depending on the size of your database; however, you may use TDO while the images are copied over.

2) The **Data Path** is the folder where you store your TDOfficeData. In this field, enter the correct path (for example, S:\TDOfficeData).

3) The **Backup Path** is where you store your TDO Backup. Remember to always store your backups on the dedicated hard drive used for TDO data only. Again, this should be your administrative workstation's

local hard drive or a removable hard drive, not your server. Enter the correct path (for example, F:\TDOBackup).

4) The **TDO Builds Path** is where your TDO setup/installation files are stored. These files should be stored on the server. In this field, enter the correct path (for example, S:\TDOBuilds). If you have any questions or concerns, contact support@tdo4endo.com.

IMPORTANT: The first time you run the TDO Backup utility, it will take longer than usual since you will be backing up all of your images at one time. Future backups should take less time because the system will backup only the new or modified pictures.

REMEMBER: The doctor is responsible for the TDO backup! This is not the responsibility of the IT Professional, Office Manager or TDO Technical Support. This is the doctors' responsibility alone.

Again, we do not support tape backups or other backup applications outside of the TDO backup utility and we cannot restore your data from them.

Running the TDO Fire Drill

What Is A Fire Drill?

The TDO Fire Drill is the process of simulating a problem with your server, in which case you would need to configure another computer in the office to function as the server. TDO has a robust backup and restore procedure that will allow you to have your office up and running in 30 minutes, as long as you follow our recommended backup protocol. Before running the fire drill make sure you have a good backup structure. Review and follow the backup instructions prior to running the fire drill.

1) Shut down the server. Then, go to your admin workstation and run the TDO Standalone installation. This process will configure your admin workstation as the server. In this installation, leave the application directory as the default directory (C:\Program Files\TDOffice) and change the server directory to a local path (for example, D:\TDO\TDOfficeData). For the server directory, you should use the drive letter where your local TDO backup is stored.

2) After the Standalone installation is complete, open the "Backup TDO" shortcut on the desktop. Change the "Data Path" from the server (that is shutdown) to the new data path that was just created locally at the admin (for example, D:\TDO\TDOfficeData). Also, verify that the "Backup Path" shows the path where the most recent backup is stored. Since this is your admin computer, this backup should be local (for example, F:\TDOBackup). Finally, make sure the "Server-Database" path shows the name of the admin workstation. Do not proceed if the path shows the name of the server.

3) If everything is correct, proceed by clicking the "Restore" button. To restore more quickly, only check the box for "Server Data." Restoring only the "Server Data" will take about 15 minutes. After the server

data restore is complete, only check the box for “TDO Images/Xrays” and then click “Restore” again. Restoring the images will take longer than restoring the server data. This may take 30 minutes or more, depending on the size of your database; however, you may use TDO while the images are copied over.

4) After the server data restore is complete, test to make sure TDO is working fine on the admin workstation (where you just ran the restore). If you can log in to TDO on that computer and everything appears fine, then continue with the steps below.

5) Share out the admin workstation’s local hard drive where the TDOfficeData is currently installed (for example, D:\TDO\TDOfficeData). Be sure to share this hard drive with the proper permissions, so all of the other workstations can have access to this hard drive.

6) Next, map the network drive in all other workstations to the admin workstation’s shared drive making sure the new mapped drive can access the TDOfficeData folder (for example, S:\TDOfficeData).

7) Finally, reinstall TDO in all the workstations selecting the server directory as the new TDOfficeData directory (for example, S:\TDOfficeData). If you can open TDO successfully on all computers, then the fire drill was successful!

8) After the fire drill is complete, turn the server on and repeat Step 2 above; however, this time point the server directory back to the original server (not the admin computer).

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