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Backup procedures

Throughout this guide you are asked to back up and copy files. These copies are important:

- To preserve an off-site copy in case of damage to your building.
- To eliminate the need to re-key data in case of damage to your system.
- To ensure that you have a copy of your files for reference before you close the current year.



IMPORTANT! With any backup tool, we recommend that you validate and test the backup to ensure that the process is working properly. Environmental issues, data file sizes, and files in use can affect the integrity of a backup. Restoring your business data requires advanced knowledge of the Actian Pervasive, Microsoft SQL (if using), and Sage 300 Construction and Real Estate file systems. We strongly recommend you undertake this process with a knowledgeable professional, such as your business partner, certified consultant, or Sage Customer Service representative.

Files to copy

This section lists the file names to back up or copy in each application.

- Be sure to show file extensions in Windows File Explorer to ensure proper operation.
- These procedures use default file names (for example, **Current.glt** and **History.glt**). If you use named files, substitute your named files for the default names.
- History files such as **History.apr** or **History.glt** are created when you select **Tools > Move** to move a file to history. For more information on moving files to history, see the topics on "File Maintenance" in each section of this book.
- Be sure to include files in other locations as specified in **Company Settings > File Locations**.
- Ensure your backups include the appropriate files for other applications and third-party software that interface with Sage 300 CRE.

Refer to the **Files to back up in each application** list on the following pages when you are instructed to back up or copy files for a specific application.



NOTE: The files in the Files to back up in each application list are the minimum required for reporting. However, additional files may be needed. When you back up your entire database, these files will be included. If you need to restore your Sage 300 Construction and Real Estate database, you should restore the backup of your entire database.

Files to back up in each application



NOTE: Files that can be named will have the same extension as those listed in the table above. For example, January.api would be a named Accounts Payable invoice file. To determine if named files are used, go to **Company Settings > File Locations** to look for file types where **Ask Name** is selected.

Accounts Payable	Accounts Receivable	Billing
Current.apt	Activity.ara	Billed.bli
History.api	Current.art	Billed.blw
History.apt	History.ara	History.blt
Master.apm	History.art	History.blw
Master.txm (if using taxes)	Master.arm	Master.blm
New.api	Master.txm (if using taxes)	Master.txm (if using taxes)
Standard.aps	New.art	New.blt
Ts.ctl	Standard.ars	Standard.bls
User.frm (in the Formula folder)	Ts.ctl	Ts.ctl
	User.frm (in the Formula folder)	Unbilled.bli
	View.arv	Unbilled.blw
		User.frm (in the Formula folder)

Cash Management	Contracts	Equipment Cost
History.cmt	Contracts	Current.eqt
Master.cmm	Active.cna	History.eqt
Master.txm (if using taxes)	Active.cnc	Master.eqm
Register.cmt	Active.cnt	New.eqt
Ts.ctl	Settings.cns	Standard.eqs
User.frm (in the Formula folder)	Ts.ctl	Ts.ctl
	User.frm (in the Formula folder)	User.frm (in the Formula folder)

General Ledger	Job Cost	Payroll
Current.glt	Current.jct	Current.prt
History.glt	History.jct	History.prt
Master.glm	Master.jcm	Master.prm
New.glt	New.jct	New.prt
Ts.ctl	Ts.ctl	Pr.frm (in the Formula folder)

User.frm (in the Formula folder)	User.frm (in the Formula folder)	System.prs Tax.prx Ts.ctl User.frm (in the Formula folder)
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Project Management	Property Management
Correspondence.pjc	Accum.pma
Document.pjd	Current.pmt
FieldReports.pjf	History.pmt
Log.pjl	Issue.pmz
Master.pjm	Lease.pml
View.pjv	Master.txm (if using taxes)
	New.pmt
	Property.pmp
	Recovery.pmv
	Retail.pmr
	System.pms
	Tenant.pmn
	Ts.ctl
	User.frm (in the Formula folder)

Data in other related ~~data~~ folders that you may want to back up include:

- Purchasing and Inventory files, which are located in the **POIVData** folder under your company data folder.
- Service Management files, which are located in the **SMDData** folder under your company data folder. If you have SM files in a different location, note the location by selecting **File > Data Folder Settings > File Locations > SM Data**.
- The files in these folders should not be backed up individually. It is necessary to include the entire folder when backing up Purchasing/Inventory and Service Management data files.

Backing up files using System Administrator

We recommend that you use the backup operation in the System Administrator tool to back up your company data (including the Global, Service Management, Purchasing, and Inventory data) on a regular basis. See the [Using System Administrator to back up and restore your data](#) video for more information.



NOTE: Although you can still use File Tools to back up and restore your company data stored in Pervasive, File Tools cannot back up and restore the SQL data.



IMPORTANT! Perform the backup during off hours so that nobody is accessing or changing the data. If someone is using the software, some data files may be locked and the backup will fail.

► To use System Administrator to back up data:

1. On the server, access the tool by selecting the **Sage Administration** program group (from the **Start** menu) and then selecting **System Administrator**.
2. Click the **Backup** tab.
3. Your company folders are shown in a table. Select the **Backup** check box in front of the companies to include in the backup.

If you have more than one company, we recommend that you back up all of them.

4. In the **Files** column, select the type of files to back up:
 - **All:** Includes print files or other file types that were saved inside the company folder as well as the data files.
 - **Data only:** Only includes the Pervasive files and folders (not other file types such as .bmp and .txt files) inside the company's data folder.



WARNING: The extended data files for large data files exceeding 2GB are not being included in the backup with the **Data only** option. Use the **All files** option instead. See the knowledgebase article titled [System Administrator Backup tool excludes extended data files when the Data Only option is selected](#).



NOTE: We recommend that you select **All**. The Sage\Timberline Office\9.5 folder is always included in the backup.

5. If you need to add other folders or files to the backup, click [**Add Folder**] or [**Add File**] and then select the folder or file; it will be listed in the table.



NOTE: You may want to include folders containing attachments that are not already in the data folders.

6. Select the folder to store the backed-up data by either:
 - Typing the path.
 - Clicking [**Browse**] and selecting the folder.
7. To schedule a time every day for an automatic backup, select the **Automatically back up every day at** check box, select the time, and click [**Save**].



TIP: The automatic backup selection creates a task in the Windows Task Scheduler. You may be able to use that tool to adjust the timing and days of the week to back up the data automatically.

8. To back up your data immediately, click [**Save**] and then [**Back Up Now**].

When the backup runs, success and failure messages display on your screen. If there is a failure, click [**View Log**] to view the log file to determine the issue.

The backup process creates a zip file named **backup<DATE>_<TIME>.zip** that contains:

- The Pervasive data folders for the companies you selected in step 3
- The SQL database (if your data was replicated)
- The 9.5 folder (without Wininst)
- Any additional folders or files that you selected in step 5
- Log files with the backup information

Backing up files using File Tools

Although we recommend that you use the backup operation in the System Administrator, you can use File Tools to back up the entire Sage 300 Construction and Real Estate data folder or selected data files.

Information about how to back up files using File Tools is also included in the knowledgebase article titled, [How do I use File Tools to back up data files?](#)



NOTES: When you use File Tools, the folder options of Windows Explorer should be set to display file extensions.

File Tools is not able to back up the extended data files for large data files exceeding 2GB. Refer to the knowledgebase article titled, [Error: "CP5 error Overflow for Zip.Add" \(data file size exceeds 2GB\)](#) for further information if you encounter this error.

► To use File Tools to back up data:

1. Open Sage Desktop and select **Applications > Common Tools > Tools > File Tools**.
2. In the **Operation Selection** window, select **Backup** and click [**Next**].
3. In the **Backup Operation** window, select the folder or files you want to include.

To back up an entire folder, click [**Add Folder**] and then select the folder that contains the files to be backed up. When you select a folder, all sub-folders are included. Use the down arrow at the right to open a list of available drives and folders. You can navigate to a higher folder on the same drive or change the search to another drive by selecting the applicable drive or folder. You can navigate one level upward by clicking the folder icon with the up arrow. Perform this step for each data folder you want included in the backup.

To backup individual files, click [**Add Files**] and then select the files that you want to backup. Press and hold the CTRL key on your keyboard to select multiple files. To include Purchasing and Inventory and/or Service Management data after selecting the individual files, click [**Add Folder**] in the Backup Operations window, then browse to and select the POIVData and/or SMDData folder that you want to backup. Each folder will need to be added separately.



NOTE: Purchasing and Inventory (POIVData) and Service Management (SMData) folders are automatically included in the company folder backup if they are located inside the company data folder. However, if your SMData folder is in a different location, note the location by selecting **File > Data Folder Settings > File Locations > SM Data**. To back up the SMData folder when it is located outside your company data folder, click [**Add folders**] and choose the **SMData** folder located in the folder noted in File Locations

To back up additional files (in folders that are not already selected), click [**Add Files**]. Select the files to be backed up by holding down the CTRL key and clicking each file to highlight it. You can highlight all files by pressing the CTRL + A keys. Click a file again to remove the selection highlight

4. Click [**Next**].
5. For **Destination**, specify the name and location for the backup file or click [**Browse**] to locate the destination folder.
6. For **Archive Name**, type the name of the new archive file you want to create. You can click [**Append**] to insert either a date and time stamp or to add a unique numeric value to the file. The .tsZip2 extension will be used if you do not enter an extension.



NOTE: Be aware that if the **.tsZip2** file you specify already exists, it will be overwritten by the new file.

7. (Optional) For **Comment**, type a comment that will appear with this backup if the backup is restored.
8. Click [**Next**] to begin the validation.
9. When the **Validation Summary** window appears, click [**Next**].
10. When the **Verify Files** window appears, verify that the correct folders and files are included, and then click [**Next**].
11. When the **Execution Summary** window appears, verify that the process is correct, and then click [**Next**] to start the backup.
12. When the **Operation Journal** window appears, review the processes that were performed, and then click [**Save**] to save the journal or click [**Print**] to print the journal.
13. Click [**Finish**] to exit File Tools.

Copying files using File Tools

You can also use File Tools to copy selected Sage 300 Construction and Real Estate data files to another location. These copies are meant to restore files immediately if a process does not finish successfully. They are not meant to replace your full backup. When you use File Tools, show file extensions to ensure proper operation.

► To use File Tools to copy files:

1. Open Sage Desktop and select **Applications > Common Tools > Tools > File Tools**.
2. In the **Operation Selection** window, select **Copy** and click **[Next]**.
3. To copy your entire data folder, click **[Add Folder]** then select the folder that contains the files to be copied. Use the down arrow at the right to open a list of available drives and folders. You can then navigate to a higher folder on the same drive or change the search to another drive by selecting the applicable drive or folder. You can navigate one level upward by clicking the folder icon with the up arrow.
4. To copy individual files, click **[Add Files]** to open the list of files eligible for copying; then select the files to be copied by holding down the CTRL key and clicking each file to highlight it. To remove a highlight, click the file again. You can highlight all files by pressing the CTRL + A keys.
5. For Destination, specify the full path where files will be copied or click **[Browse]** to locate the destination folder. If you are copying to a CD, choose the CD drive as the destination folder.
6. Click **[Next]**.
7. If any of the files being copied already exist in the destination location, a warning will appear for each one. Select one of the following options for each warning:
 - **[Yes]**: Overwrite the file named in the warning.
 - **[Yes to All]**: Overwrite this file and any additional files that already exist and have duplicate names of those being copied. No more warnings will appear.
 - **[No]**: Do not overwrite; remove this file from the list to be copied.
 - **[No to All]**: Do not overwrite this file or any additional files that already exist and have duplicate names of those being copied. No more warnings will appear.

As the files are copied, the status is shown in the Progress window. If the validation process finds issues that need to be resolved, the wizard will instruct you how to fix them.



NOTE: If you click **[Back]** before an operation is complete, the program returns to the previous window without completing the operation. If you click **[Cancel]**, you cancel any further operations and exit File Tools; if any previous operations were already completed successfully, they are not canceled.

When the copy operation is complete for all files, review the processes that were performed, and then click **[Save]** to save the journal or click **[Print]** to print the journal.

8. Click **[Finish]** to exit File Tools.