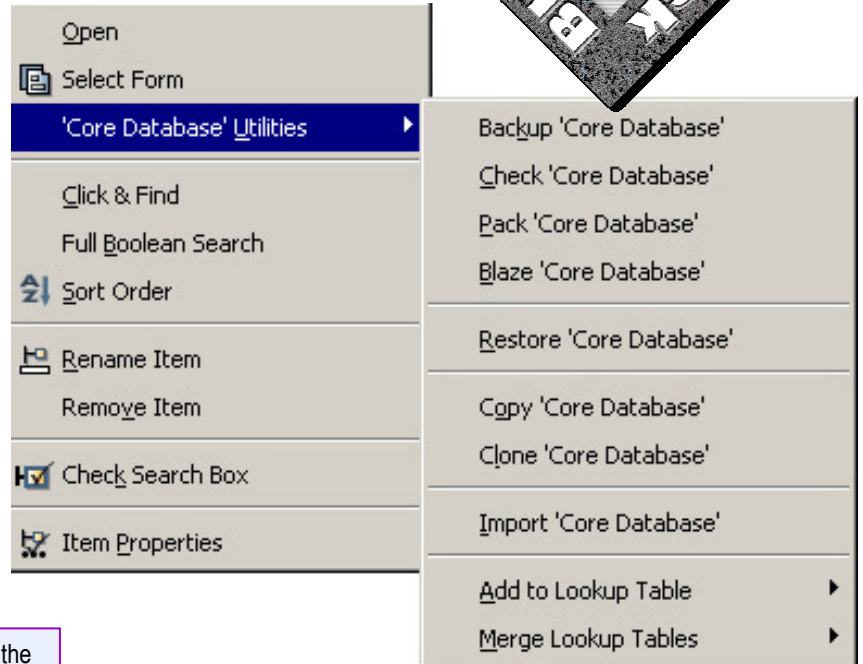


AD SUMMATION® UTILITIES

Backup ■ Check ■ Pack ■ Blaze

Summation provides you with several utilities to help maintain the Core Database in your case. It is recommended that you perform the maintenance described below after adding, editing or deleting approximately 100 records or notes or at the end of a day where any record has been added, edited or deleted.

Core Database utilities can be easily accessed by *right-clicking* on the Core Database folder in the Case Explorer and then selecting **Core Database Utilities**. In addition, most of the utilities are accessible from the **UTILITIES** menu. Another -- Backing Up -- is accessible from the **TOOLS** selection on the **CASE** menu and from the Core Database Utilities menu. *You should always backup the Core Database and the Notes before performing any of the utilities.*



NOTE: No one else may be working in the database while maintenance is being performed. Check the network status for active users before proceeding. To Check Network Status: CASE EXPLORER FOCUS hit F3 OR in the drop down menu select FILE>NET STATUS. A list of users and the case they are working in is displayed. Wait until they have closed out of Summation, or if there are time constraints, request they log out until notified. A password may also be assigned to limit access during maintenance.

NOTE: it is important that you perform the maintenance in the sequence described below under TO MAINTAIN DATABASES. Do not skip any steps or perform the steps out of order. Performing this maintenance is crucial to protecting your data.

SECURITY NOTE: If you do not have the rights to run Utilities, this menu option will be grayed out. In addition, if security is set so that you do not have rights to Pack the database, you will not be able to correct any errors that may appear during the Check phase.

TO ACCESS THE UTILITIES DIALOG:

1. Right-click on the **Core Database** folder in the Case Explorer.
2. Select **Core Database Utilities** for a menu of all the available database utilities.

TO MAINTAIN DATABASES:

3. Select **BACKUP** from the Core Database Utilities menu. Follow the instructions in the wizard. .
4. Repeat steps 1 and 2 as noted above, selecting **CHECK**, **PACK** OR **BLAZE** at Step #3.
5. Repeat in order each step for **BACKUP/CHECK/PACK/BLAZE**.
 - If the Check utility detects errors, **DO NOT continue to use the database or note file and do not proceed to the next step (packing)! Restore the most recent error-free backup and call Summation Tech Support at 1-800-786-2778.**
6. If no errors were reported during the Check procedure, then select **PACK** THE DATABASE. **Never pack a database or note file that contains errors.** Restore the most recent backup.