
Vision 3

System Management

User Guide



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The Bread Factory, 1A Broughton Street, Battersea, London, SW8 3QJ

T: +44 (0) 207 501700 F:+44 (0) 207 5017100 W: www.inps.co.uk

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INPS Ltd.

The Bread Factory
1a Broughton Street
London
SW8 3QJ

Website: www.inps.co.uk

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Regular Housekeeping in Vision

Daily Routines

Daily overnight backup

- Each morning after backup, check backup log that backup is successful – take tapes off-site.

GPC:

- Automatic transmissions to HA/Path lab for registration links, IOS and path results
- Check Attention folder for messages in error

Mail Gateway:

- Check status of the Clinical schedule and Tasks.

Registration:

- register new patients
- amend patient details (address, etc)

Registration Links

- Check the Daily Status screen to see if archive is due.
- Check and clear any unacknowledged acceptances ("frozen" patients)
- Check outstanding Medical Records which need sending back to HA
- Process Incoming Transactions
- Look at Error File and delete any unmatched transactions
- Print off day's transactions from Reports – Daily Transactions
- Items of Service:
- Check Daily Status screen, especially number of days since last transmission
- Check and process system rejected and HA rejected claims, particularly contraceptive claims
- Check and clear awaiting acknowledgements
- Delete unmatched transmissions (Maintenance – Unmatched Transactions)

Mail Manager:

1. Assign any unmatched messages to a patient
2. Allocate any unallocated messages to a GP
3. Action screen and complete actions

4. File messages flagged for filing

Clinical data - Consultation Manager:

- Enter clinical data in Consultation Manager.
- Set up and issue repeat prescriptions in *Therapy Repeat*.
- Enter all recalls.
- For practices linked to the HA for Items of service, claims can be generated as you enter data, then transferred and stored in the Items of Service module before transmission to the HA

Appointments:

- Arrange templates for the GPs and other practice staff
- Book Appointments.

Weekly or Regular Routines

Weekly backup

- Clean backup device (DAT drive)

Reindex (every two weeks)

Update virus software

Monthly and occasional routines

Monthly backup

Users change passwords

Update drug and Read dictionaries (usually automatic via DLM Download Manager)

Run **Clinical Audit**

Occasional

Replace worn backup tapes

Registration Links:

- Carry out Quarterly Archive when due and print Quarterly Certificates when due

Appointments:

- Extend appointment books
- Make up new sessions/books

Searches

- Run Target Reports quarterly
- Run Capitation Reports quarterly
- Run Referral Report quarterly

Backup Exec

Currently Backup Exec is used as backup software. As well as the on-screen help provided as part of the Backup Exec software, there is also a user guide on the INPS website. This advises you about tasks such as manual backup, labelling tapes, when to backup, how to tell if a backup is successful, and troubleshooting any problems.

See also the sections in Disaster Recovery Plan called *A sound backup strategy* (page 16).

Remember these important points:

- Backup **every** day – scheduled to run overnight.
- Rotate the daily tapes - one for each weekday. Tape A on Monday, Tape B on Tuesday, Tape C on Wednesday, Tape D on Thursday. Tape F could be used for Saturday if you run Saturday surgeries.
- Do weekly backups - Tapes E, G and H are used on successive Fridays to provide weekly backups.
- Do monthly backups - Tapes I, J and K are monthly tapes, used on the last Friday of the month.
- Keep a computer log book as a practical way of recording which tape was used for backup.
- Most backups now occur overnight. **REMEMBER TO CHANGE THE TAPE EACH MORNING TO THE NEXT TAPE REQUIRED FOR THE NEXT NIGHT.**
- Keep the tape just backed up off site in a secure, dry place. Only bring this tape in if you anticipate the Help Line or engineering will need, or it is due for its next appointed backup.

Make use of the *Tape Verification Service* (page 18) offered by In Practice Systems, to have your backup tapes verified at least once a quarter. This makes sure the data on your backup tape is complete and error free.

Reindex

Reindex Manually

Reindex is a standard housekeeping procedure which ensures that your **Vision** system is running as efficiently as possible. It can be run either manually, or as an automatic process.

Create a Reindex icon on your Desktop

If there is not a Reindex icon on your Windows Desktop, create one by following steps 1 –7 (you will only need to do this the first time).

If there is already a Reindex icon on your Desktop, start at step 8.

1. Right click on the windows desktop. Choose **New - Shortcut**.
2. In the command line, type **O:\INSTALL\DISTRIB\VISSUPP\Foxr.exe Reindex.spx** (type a space between Foxr.exe and Reindex).
3. Click **NEXT**.
4. **Select a name for the Shortcut** - Change the name of the shortcut to **VISION Reindex**.
5. Click **NEXT**.
6. Now choose an icon from the displayed list of icons.
7. Click on **FINISH**. The shortcut that has just been created will display on the desktop.
 - Right mouse click on the icon and select Properties.
 - Click on the Program tab and click on Close on exit (a tick or check should appear in the box next to it).
 - Click on the Screen tab and click on Full screen.
 - Click on the Apply button. The shortcut is now ready for use.

Running Manual Reindex

Everybody must be signed out of Vision.

1. Double click on the Reindex icon to launch the Reindex program.
2. Use the TAB key to highlight **REINDEX** and press Enter, or click on <Reindex>. This starts the process of reindexing all files.

Note - If individual files are to be reindexed, click on <Deselect all files>, then double click on the individual files are required. When the selection is complete, click on <Reindex>.

3. Once the Reindex has completed, the program will close and the desktop will be displayed again (if not, press RETURN then ESCAPE **twice**).

Reindex Automatically

Reindex is a standard housekeeping procedure which ensures that your **Vision** system is running as efficiently as possible. It can be run either manually or as an automatic process.

This section outlines the process for using the Automatic Re-index. For help on any points you are not clear about, please refer to the Vision HelpLine. The automatic re-index program will ensure that your Vision data and Vision system in general will suffer from less data problems and will continue to work as designed.

Auto-Reindex: Logon to and Set up the NT4 Fileserver

Note - The processes and software listed below CAN be run while the Vision system is being used. You do NOT have to ensure everyone is logged out. Also there is NO need to take a full system backup before installing this utility.

1. Logon to the Fileserver as Administrator.
2. Click on **START** then **RUN**.
3. Enter **CMD** and click on **OK** to confirm. This will take you to a command prompt. You will be prompted with a drive letter which could be anything from c to f.

Reindex Needs Exclusive Use

As the process requires exclusive use of Vision, it will be necessary to run reindex when nobody needs to use Vision, either in the evening or over the weekend. A full reindex process will take some time to run, depending on the size of the databases.

Important Notes

- **Nobody must use Vision whilst the reindex process is running.**
- **The Backup must not take place whilst the reindex process is running.**
- **GPC processes must not be running during the reindex process.**

Starting the Scheduler Service

1. Firstly, we need to start the Scheduler Service. To do this, type the following at the command prompt:-

net start schedule

and press Enter.

The Scheduler Service should start and confirm that it is running. If, at this point, you receive a warning message saying that the Scheduler is already running, then this is correct - please ignore it. If you receive a warning message saying that the Scheduler could not be started, then please contact the Vision HelpLine for assistance.

2. Assuming the Scheduler has started, we now need to install the rest of the software and setup an appropriate overnight schedule.
3. Type **exit** and press Enter to close the command prompt window.
4. **Now move to one of your workstations that runs Vision correctly.** Ensure that you are logged into the workstation using the standard everyday user name that you have been allocated.

5. Ensure that you can login to Vision as normal and then close down Vision on the workstation.
6. Use **START** then **PROGRAMS** then **MS-DOS PROMPT** to obtain a command prompt which will usually be **c:\windows** or **c:\winnt**.
7. Insert the supplied diskette, named **Auto-Reindex** into the floppy drive of the workstation.
8. At the command prompt, please type: **a:install** and press Enter. This will copy the required files to your Vision system. Please report any errors displayed to the Vision HelpLine.
9. Type **exit** and press Enter to close the command prompt window.
10. At this point you need to find out:-
 - a) From the GPC3 workstation, what times your overnight processes are for Registration, IOS and Pathology transmissions.
 - b) From your Backup System, what time the overnight backup runs and for how long.
 - c) How long your last reindex took to complete.

Hint - The new timed reindex program should take far less time when running on the NT4 Fileserver. Use your last reindex time as a typical guide.

11. Juggling all the above figures, you should be able to work out an appropriate time for your overnight reindex to run. Please ensure that this does *NOT* conflict with your Backup or GPC3 timings.
12. Again, if in any doubt, please contact the Vision HelpLine.
13. Insert the supplied diskette, named **Auto-Reindex** into the floppy drive of the fileserver.
14. Click on **START** then **RUN**, enter **CMD** and click on **OK** to confirm.
 This will take you to a command prompt. You will be prompted with a drive letter which could be anything from c to f.
 Type: **a:timed xx:yy** and press Enter. xx:yy is the time in 24 hour format, for example, 03:05.

Checking the Timed Schedule

1. To check the schedule. From a command prompt (see step 15 above), type: **AT** and press Enter. You should see something similar to:-

```

STATUS      ID      DAY      TIME  COMMAND LINE
-----
23          ---     -----  -----
                Each  M T W T F  03:05 d:\vision\install\distrib\wis
                                     supp\reindex.cmd d:\vision\install\distrib\wissupp\,0001
  
```

Hint - The program will run each Monday, Tuesday, Wednesday, Thursday and Friday at the specified time.

2. The above is an example of what you are likely to see on the console. If you have more than one entry, delete all entries (see below) and re-create the job.

3. If you have a scheduled entry showing a time of 10:20 am, then this means the Scheduler has a problem. You should delete the entries (see below) then re-schedule. If the job still shows 10:20 am, then please delete it and contact the Vision HelpLine.

Caution - A scheduled job at 10:20 am WILL cause problems in morning surgery !!!

4. If you see the following: **There are no entries in the list**, then you have no scheduled jobs and need to create a new scheduled entry, see above for more information.

To View the Scheduled Reindex Log File

1. Firstly, from a working Vision workstation, create a new shortcut by:-

Right mouse click on a clear area of desktop

Select **New** then **Shortcut**

Enter the following:-

O:\install\distrib\vissupp\reindex.txt

Click on **Next**

Change the name of the shortcut to **Vision Auto-Reindex Log**

2. Click on **Finish**.

You can now use this log file to check for errors after each time the Scheduled Reindex finishes. Any errors should be reported to the Vision HelpLine.

The log file will be overwritten each time the Scheduled Reindex occurs.

Check If Reindex is Successful

Open O:\install\distrib\vissupp\reindex.txt

The first line gives the date & time the reindex was started & which file system is reindexed.

There is one line for each database that is being reindexed (usually APPHOLD to VR_VER) - so long as the last line reads "Reindexing Completed successfully" then the process has worked.

{EXAMPLE STARTS}

DD Month YYYY hh:mm am Reindexing Vision Data Files - File System :

Live System

hh:mm am Reindexing

hh:mm am File P:\APPHOLD.DBF has been reindexed

hh:mm am File P:\VR_VER.DBF has been reindexed

hh:mm am Reindexing Completed successfully

{EXAMPLE ENDS}

To Delete a Scheduled Reindex

From a command prompt (see above), type: **AT /D** and press Enter. This will prompt you to delete all scheduled entries. Confirm as prompted.

To Put a Scheduled Reindex on Hold

From a command prompt (see above), type: **NET STOP SCHEDULE** and press Enter. The system will respond by stopping the Scheduler.

Disaster Planning

What is a Disaster?

A disaster is any event that interrupts a practice's computer operations. When a network server fails, due to human error, hardware failure or a major disaster, the system must be carefully recovered before the applications and backed up data can be restored.

What is Disaster Preparation Planning?

Disaster preparation planning is the implementation of strategies and procedures that will minimise damage in the event a catastrophe destroys your data.

While precautions can be taken to minimise the effects of this type of occurrence (UPS devices, password protection, and so forth), unfortunately there is nothing that can safeguard your data 100 per cent. The purpose of a Disaster Preparation plan (DPP) is to return to an operational status as quickly as possible.

This section sets out some ideas for Disaster Preparation Planning. Should the worst happen, a telephone call to the Help Line should be one of your first steps.

The Disaster Preparation Planning

The Disaster Preparation Plan (DPP) you put in place with your Backup Exec system should be tailored to your network environment. While environments vary in different organisations, there are five elements to consider when creating a comprehensive DPP. They are:

- Hardware protection
- The ability to maintain the practice's operations during a disaster period until the server can be restored
- A sound backup strategy
- Off-site storage of backups
- Effective DPP management

Of course, many of these are bound up with basic information security strategies which should also be running at your practice.

Hardware Protection

The hardware devices on your network (CPUs, drives, video) are susceptible to damage from many disaster situations.

Equipment to Protect Hardware

Here is a list of **equipment** most often used today to protect hardware:

- Uninterruptable power suppliers (UPS)
- Surge protectors
- Security monitoring devices

If you do not already have these items in place, you should consider installing them. The initial investment could be justified many times over in the event of a disaster.

Risks of Theft

You should consider minimising the **risks of theft** of your computer by taking sensible precautions:

- Be aware of the problem of opportunistic theft – although this is unlikely to be your file server, computers or particularly laptops in consulting rooms left unattended for a few minutes are vulnerable.
- Make sure you know who all visitors are. Patients should be booked in, and other visitors supervised.
- Your reception area should as far as possible not have visible computer terminals. Screen computers with filing cabinets, screens etc in order to hide the machines.
- Security mark your machines – to help in recovery.
- Lock up the surgery premises properly. Install burglar alarms, security grilles, lockable shutters etc.
- Physically bolt your computers down to the desk and chain the monitor. Computer suppliers have a range of products.
- Consider purchasing an audible alarm which is triggered by a motion detector. For networks, Netlock (from Hillier-page) can be installed.
- Chassis locks can prevent the computer case being opened easily, so preventing chip thefts. Keys should be held by the practice manager.

Other Hardware Issues

- Never move a computer when it might be writing to disk. The safest approach is to avoid moving it at all while switched on.
- Ban the use of drinks near the computer or keyboard.
- Don't trail cables, which could accidentally pull out a plug.
- Don't try and mend equipment yourself – get expert help.
- Don't place the computer next to radiators, water pipes and other sources of heat or dampness.
- Turn modems off when not in use – this is more of an information security issue but could prevent external access to the PCs via network lines left open.

Regular Maintenance of Software

- Use a computer anti-virus program. This should be updated regularly – at least once a month - to cope with new viruses.
- Do carefully check any disk coming into the practice for viruses – not matter where it has come from. Some practices have a "quarantine PC", which is totally isolated from any other computer. The quarantine PC can be used to test all discs (data and software) for viruses.
- Don't use non-standard software from magazine covers, friends, clubs etc.
- Regularly back up your files and keep the copies safe off-site (see below - [A sound backup strategy](#) (page 16) and [Off-site storage of backups](#) (page 17)).
- Make copies of your Windows registry files.
- Password protect your data. Password lists should not be stuck up on noticeboards!
- Regularly run hard-drive maintenance tools, particularly surface scans, and defragmentation routines. This helps to avoid writing to damaged disk sectors.
- Discourage staff from tinkering with the program files.
- Screensavers in Vision are compulsory and will blank screens after a short time interval.
- Where possible, archive material from the hard disk.
- Delete duplicated documents from a word processing package and zip up other large word-processing documents. A "Disk Full" message could mean disaster.
- Keep all computer disks in an organised way in a safe place, locked away in storage boxes. Don't leave them by the computer.
- Join the [Tape Verification Service](#) (page 18)

Disaster Planning - Tell Your Staff

Run training sessions to make sure all your GPs and staff are aware of what to do if a disaster occurs. Some may be given specific tasks, such as recording new patient registrations. Emphasise that EVERYONE IS RESPONSIBLE FOR INFORMATION SECURITY. But don't make your security so rigid that it causes inflexibility.

Plan How to Manage if Disaster Strikes

Make sure that proper precautions are taken by everyone to implement plans for network interruptions. For example, the phones in Reception won't stop ringing because the server is down, so prescriptions may have to be hand-written until the server is up again. Each department should work out strategies for such occurrences. If the proper precautions are taken, the server can be rebuilt quickly and operations can still continue.

Maintaining Patient Registration

Staff should be allocated to keep a manual record of all new patient registrations, transfers out, and amendment to registration such as address changes. These will all need to be entered once the computer is restored. A transmission will need to be run, if your practice runs Registration Links.

Temporary residents, new registrations and new children should be tracked to make sure the items of service claims for TRs, new registration exams and child health surveillance are not missed.

Maintaining Patient Clinical Records

Repeat prescriptions will have to be hand-written and a record kept of each issue. Reprinting each script as a duplication is one way to do this.

Keep manual records of patient consultations. Some template sheets in columns headed with date, time, patient name, dob, consultation details and outcome could be pre-printed and stored ready for hand-written entry.

Items of service claims should be tracked for records of maternity, immunisations (include batch numbers), night visits, minor surgery and immediately necessary treatment.

Maintaining Appointments

Make sure that in Appointments – Maintenance – System Constants, the backup facility is switched on. You need to do this **AT EACH WORKSTATION WHERE THE BACKUP IS TO OCCUR, AND THE WORKSTATION NEEDS TO BE RUNNING IN ORDER TO TAKE THE BACKUP.**

The recommendation is two workstations – the one used for regular appointments in Reception: check the box *From this workstation*; set to backup every five minutes, type 2 in *Backup days after today* (ie today and tomorrow). On a second workstation, perhaps the practice manager's, check the box *From this workstation*; set to backup every 30 minutes, type 15 in *Backup days after today* (ie today's and next 15 days' appointments).

In both, leave the file name as c:\appt_bak.txt. Of course if your whole system is down, you won't be able to print this file until up and running again. When you can print the appointment list, go to a text editor such as Write or Wordpad (it may be too big for Notepad), open the file and select c:\appt_bak.txt. It is advisable to change the font to a non-proportional one, such as Courier, as this makes the tabulation of the appointment list clearer.

Maintaining Other Practice information

This might include practice financial and personnel information. The practice manager should devise his or her own strategy for maintaining changes to these files while the system is down.

A Sound Backup Strategy

Regular Backups

Regularly backing up your files is perhaps the most important strategy. A well-designed media rotation scheme (as explained in the Supplement to the Backup Exec User Guide KMAN094) plays a key role in quickly restoring your file server.

This involves a DIFFERENT named tape for each day of the week: use Tape A on Monday, Tape B on Tuesday, Tape C on Wednesday, Tape D on Thursday. Tape F could be used for Saturday if you run Saturday surgeries. Tapes E, G and H are used on successive Fridays to provide weekly backups. Finally, Tapes I, J and K are monthly tapes, used on the last Friday of the month.

Keeping a log book is a practical way of recording which tape was used.

Most backups now occur overnight. **REMEMBER TO CHANGE THE TAPE EACH MORNING TO THE NEXT TAPE REQUIRED FOR THE NEXT NIGHT.** The tape just backed up can then be moved off site.

Is your backup working properly?

Secondly, don't assume that your backup is always working. Don't just assume that because the tape has ejected from the drive, that everything is OK. Check in the log file in Backup Exec.

If you see the word **Skipped** against a QDR file, you can usually ignore this – QDR files are printing files. But if **Skipped** or **In Use** against a data file, such as \vision\data, then Vision was still open or in use when the backup took place. If \vision\data\login.dbf was In Use, then this means somebody was logging on at a workstation.

The file SYS\$LOG.ERR should show any errors.

What you are looking for is a message that the Job completion status (of the backup) was normal or successful. Where you can see this message varies with the version of Backup Exec you have and you need to check in the Backup Exec chapter 14 of the Vision Training Guide for details.

Off-site Storage of Backups

It is imperative that backed up data be moved off-site regularly. This ensures that if something happens to your facility, all of your backups are not destroyed. Depending on the importance of your data, you may choose to use several off-sites, with different members of staff or GPs. Storage areas should be cool, dry and away from magnetic fields, and secure from theft.

If your system is down, you will need to ensure that the most recent backup is returned to the surgery so it is available for the Help Line or Engineering staff.

As second best, storing the tapes within the surgery should only be done in a fireproof safe or secure cabinet.

Effective DPP Management

The last element – and possibly the most important – is proper management of your DPP strategy. A person or group of people should be charged with constantly supervising your practice's disaster preparation efforts. Someone should install and maintain hardware protection devices, make sure all departments have a plan if the server goes down temporarily, and make sure that backups are made and rotated off-site regularly. Also, it is a good idea to document your Disaster Preparation plan for reference purposes.

Backup Exec plays a major role in your DPP by offering an easy, reliable way of backing up and restoring your files.

It is beyond the scope of this chapter to describe what precautionary measures to take in order to make restoration as straightforward as possible in the event of a disaster.

Please contact your Account Manager who will direct you to the recommended engineering solutions.

Tape Verification Service

If the worst happens, would your back-up tape provide a full restore? The Tape Verification Service from INPS provides assurance that, in the unfortunate event of a full system failure, your Vision system could be successfully restored.

Key Features:

- Full tape catalogue
- Complete Vision directory is restored
- Capitation report
- Full verification report provided
- Return of tape by courier included

Benefits:

- Have confidence in the quality of your practice backups
- A key part of the practice disaster recovery plan

Summary of Vision Integrity checks:

Data restorability

- The core Vision data
- Attachments, scanned document, photographs etc
- Correspondence, referral letters, etc
- Templates for practice letters

Vision Access

- Consultation Manager
- Registration
- Appointments
- Patient groups

Why choose the INPS Tape Verification Service?

Tape verification is a specialist service, and only INPS has the knowledge and experience of Vision and its associated data structures to provide a complete verification of the integrity of your Vision backups.

INPS has not endorsed or approved any other supplier's tape verification service.

INPS is the only system supplier that is in a position to identify and fix issues discovered during tape verification. Potential issues reported by other services may be speculative and attract one-off engineering charges as these other services have previously been proven to be unreliable

INPS has not provided any other supplier with facilities to restore and analyse Vision data. No other tape verification service has a current Vision licence and therefore they cannot restore and check Vision data.

The INPS Tape Verification Service is the best service available for Vision users. It is the only service that thoroughly verifies the integrity of your data.

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