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Disaster Recovery

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AUTOFORM | DM

This article contains information and guidance on how to approach recovery and restoration of AUTOFORM DM in a disaster scenario for standalone only.

Overview

Overview of general recovery steps:

- Replace failed hardware
- Re-install software using the Installation Guide
- Restore system from backups using the Backup and Restore Guide

Rebuild Process

When recovering from a disaster it is important to consider the points discussed below which depend on your deployment and the type of failure.

AUTOFORM DM Server Hardware

It is preferable to switch to a Disaster Recovery server for minimal downtime. However, if this was not implemented then perform a fresh install of DM to a new server or replace the faulty hardware of the existing server.

AUTOFORM DM Virtual Machine

If DM is deployed as a Virtual Machine (VM), the machine can be backed up and restored in the event of issues. If it is necessary to create a new VM then read the following sections.

AUTOFORM DM Server Software

When performing a fresh install of AUTOFORM DM for DR it is important that it is the same version (this includes the client.war and setup.war deployed within DM) as before. If this was not backed up then contact [Formpipe Support](#) for assistance. Likewise, if client applications are not available from backup, contact support.

From AUTOFORM DM 9.0, if the properties file from the original install has been backed up, this can be used to drive a new automated silent install following our guide.

Follow the instructions in the [Backup and Restore Guide](#) to ensure the Document Archive and Chunks folders are restored and synchronised with the database.

Licensing

The AUTOFORM DM licence is locked to the database server hostname and database name, therefore only changes to the database server itself would trigger a new requirement. For this reason, failover of active-passive

setups of the application would not trigger a licence change.

If you cannot activate your licence after a disaster recovery scenario, we recommend that you put AUTOFORM DM (9+) into evaluation mode where it will continue to work for 30 days before requiring an activated licence to function again. This will give you enough time to get your system up and running again whilst you contact [Formpipe Support](#) for assistance with your licence.

Database Server

If the Database Server fails then you will need to restore the latest backup. However, it is essential that you also restore the following from the same backup as the database:

- Documents archive folder
- Chunks folder
- Encryption master password (if enabled)

This is because the database contains the metadata records but the documents archive folder contains the associated image files e.g. scanned PDF documents.

System Configuration

Refer to the [System Requirements](#) for information on the minimal requirements to install AUTOFORM DM Server.