



# SOX Backup Express

## User Guide

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# SOX Backup Express Summary

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SOX Backup automates two processes critical to a well-run Sage 300 installation: DBDump (for backups) and Data Integrity Checking.

It also manages DBDump multiday archives automatically, and it provides options to back up and manage Sage CRM databases – or any other SQL Server database.

The DBLoad process can also be automated for an installation where appropriate. SOX Backup is designed to run as a Windows Scheduled Task without user interface pop-up windows, producing a log file and providing email notification on completion.

***SOX Backup Enterprise also provides:***

- Fast DBLoad capabilities (typically 3x faster loads and database name substitution)
- Fast Data Integrity checking capabilities (typically 10x to 1000x faster)
- Restoring an archive from an FTP site – allowing you to also copy databases between different offices.

*SOX Backup Enterprise* also has sequencing mechanisms for database transfers involving multiple Windows Scheduled Tasks.

**Caution:** Although backing up on the local network protects against server failure, it does not protect against a total facility failure from fire, flood, or natural disaster. A mechanism, either manual or automated, should be in place to bring data off site on a daily basis.

## The Backup and Restore Process

SOX Backup stores all settings necessary in an XML file that can be edited with the program's user interface.

You can use the SOX Backup user interface to create one or more XML settings files that can be run manually or can be used to drive Windows Scheduled Tasks ("Jobs").

When run as a task, SOX Backup traps error messages so that they will not "pop up" in a window – any errors are written to a log file.

A job can be either a "Backup" or "Restore" job: the type is controlled by the Mode dropdown on the Settings tab.

For example, to set up a job that only checks integrity, you select Backup Mode, remove all databases from the field in the Backup tab, clear the checkbox in the Shared Folder tab and add all databases to be checked in the Integrity tab.

**A SOX Backup Express job performs the following steps:**

- Dumps Sage 300 System and Company databases to a working folder.
- Optionally, copies Sage 300's shared folder and its sub-folders to the working folder.
- Moves the working folder to an archive directory with a date-based name.

- Removes the oldest archives if the number of archive directories exceeds a maximum.
- Optionally, zips and copies the newest archive directory to an FTP site.
- Produces a log file documenting job results.
- *SOX Backup Enterprise also lets you run TaiRox Fast Data Integrity.*

**A SOX Backup Express Restore job includes the following steps.**

**We strongly advise using Professional IT resources to set up and test restore jobs.**  
Note that data is restored from the most current archive folder:

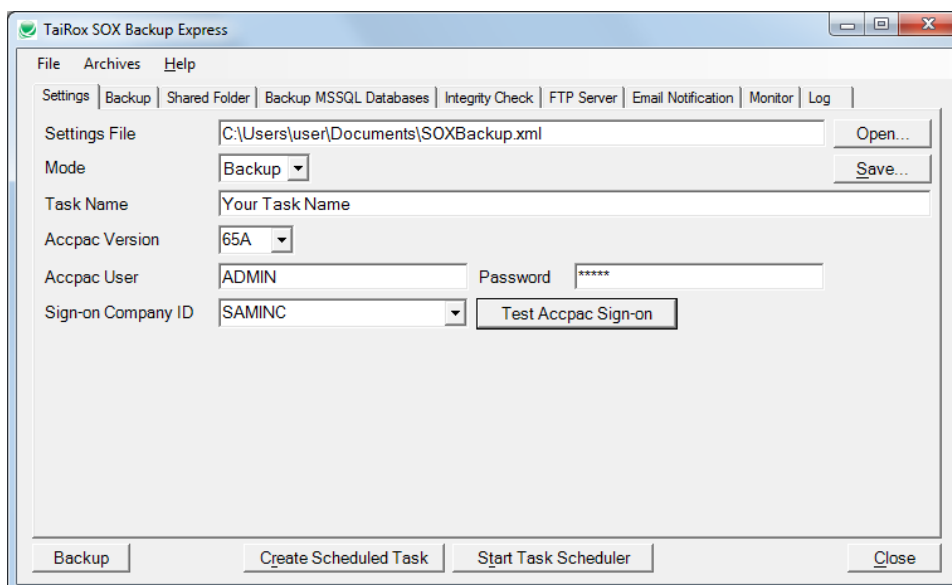
- Loads Sage 300 System and Company databases from an archive. *SOX Backup Enterprise also lets you use Fast DBTools to load a dataset into a differently named Sage 300 database.*
- Optionally, restores Sage 300's shared folder and its sub-folders from an archive.
- Removes the oldest archives if the number of archive directories exceeds a maximum.
- Runs Sage 300's Data Integrity Checking program or, if using *SOX Backup Enterprise*, optionally runs TaiRox Fast Data Integrity.
- *If running SOX Backup Enterprise also downloads a zipped archive from an FTP site, extracts into an archive directory and (optionally) removes the data from that FTP site.*
- Produces a log file documenting job results.

## Setting Up SOX Backup Express

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### Settings Tab

The following window appears when you launch SOX Backup Express.



Settings are kept in an XML file, and different jobs can be saved in different XML files and scheduled to be run at different times.

**Settings File:** All of the settings documented in this manual are saved in an XML file (passwords are encrypted). This is to allow Fast Data Integrity to be run as a Windows Scheduled Task – with the XML file passed as a parameter to the Fast Data Integrity exe program.

**Mode:** A job is either a "Backup" job or a "Restore" job. The Mode dropdown on this screen selects which job is performed and various labels in the program change to reflect the mode. The windows in this manual are for Backup mode.

**Task Name:** The Job Name field identifies the backup job and is used in the subject of email notifications and to help document the log files.

**Accpac Version:** Choose the version of Sage 300 that you have installed.

**Accpac User Name and Password:** Enter the Sage 300 user name and password that SOX Backup will use to log in to the various Sage 300 companies. Using the ADMIN user is a simple way to guarantee that there will be sufficient rights in all companies.

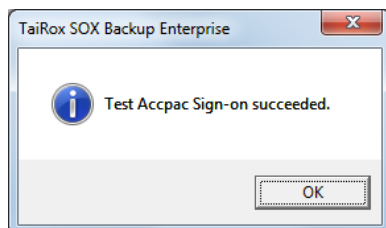
The password will be encrypted in the XML file.

**Sign-on Company ID:** Choose the company database that you want to sign on through. This company or system database must have the Accpac user whose permissions that you are using for the job.

**Important Note RE Restore Operations:** The Sign-on Company *must* be a different company from any of the companies being *restored*.

***Click the Test Accpac Sign-on button to check access.***

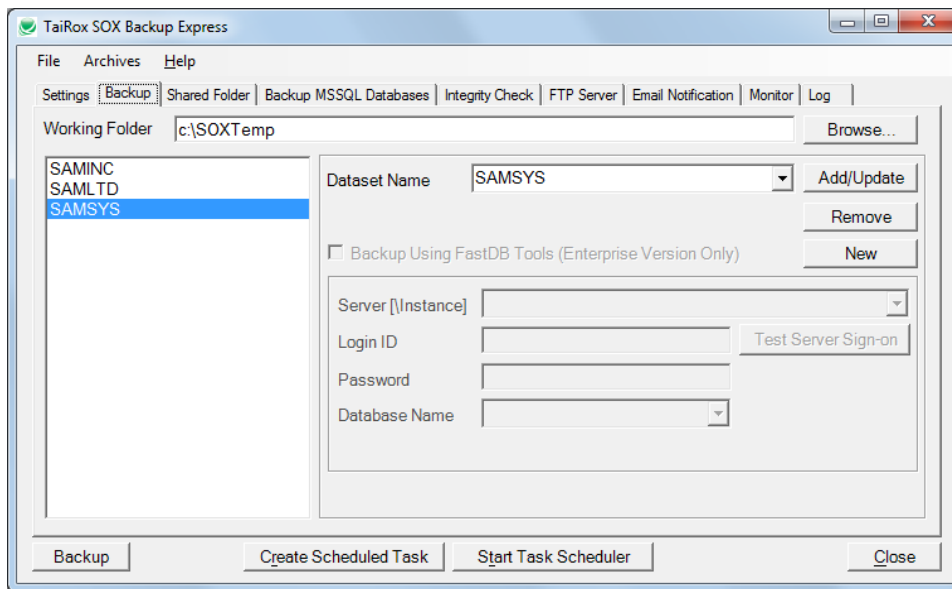
A success or fail message will appear as follows:



## Backup / Restore Tab

The Backup/Restore tab lets you specify the Sage 300 system and company databases that will be backed up or restored in this job.

The tab name changes depending on the mode – either Backup or Restore – that you choose on the Settings tab.



**Working Folder:** The working folder is where dumped databases and shared folders will be stored prior to being archived.

### Add/Remove Sage 300 System and Company Databases from the database list

These databases will be backed up / restored using Sage 300 DBDump and DBLoad utilities.

**Note:** A complete set of Sage 300 data from an installation is comprised of System and Company databases along with files in the Accpac Shared Folders.

#### To Add a system or company database to the backup/restore list:

- Click the Dataset Name dropdown to see the Sage 300 databases that are available in the share folder listed on the Settings tab.
- Click the Add/Update button to add it to the list on the left side of the form.

#### To Remove a system or company database from the backup/restore list:

- Select the Sage 300 company or system database from the list on the left side of the form.
- Click the Remove button to remove it from the list on the left side of the form.

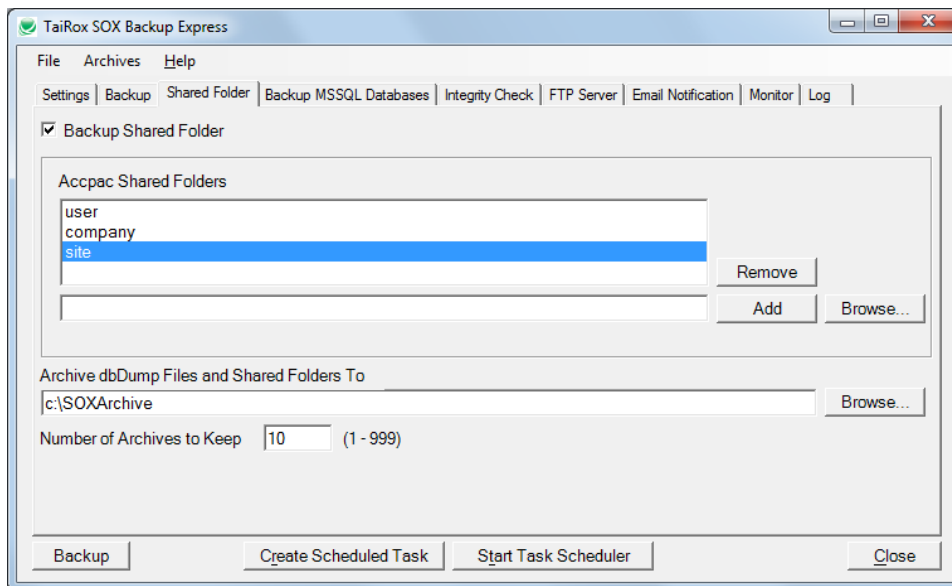
### Backup Using FastDB Tools – SOX Backup Enterprise only

If you have SOX Backup Enterprise, you can use TaiRox FastDB Tools to back up or restore a database.

## Shared Folder Tab

The Shared Folder tab lets you specify the Sage 300 shared folders that you are backing up or restoring – such as the SITE and USER folders.

**Note:** A complete set of Sage 300 data from an installation is comprised of System and Company databases along with files in the Accpac Shared Folders.



**Backup/Restore Shared Folders checkbox:** Select this checkbox to backup or restore shared folders.

The checkbox name changes depending on the mode – either Backup or Restore – that you choose on the Settings tab.

### Accpac Shared Folders

#### To Add a shared folder to the list:

- Click the Dataset Name dropdown to see the Sage 300 databases that are available in the share folder listed on the Settings tab.
- Click the Remove button to add it to the list on the left side of the form.

#### To Remove a shared folder from the list:

- Select the shared folder that you want to remove and click the Remove button.

### Restore Database Setup Information checkbox (if you are Restoring databases)

**Important Notes:** Normally, you will not restore shared folders when using SOX Backup to copy databases from one office to another.

- **If you are restoring shared folders, you may not wish to restore the database setup information** (the "ORGS" file in Sage 300 SITE directory). For example, you would not restore if the site you are restoring to does not match the backup site.

To avoid restoring this file, **do not** select the checkbox "Restore Database Setup Information".

## Archive dbDump files and Shared Folders To

Specify the folder where you want the backups archived. An “Archive” is created whenever a backup job is run or when an archive is downloaded from an FTP site.

An archive is kept in series of sub-folders named according to the date that the job was run. In this way a series of backup archives is kept.

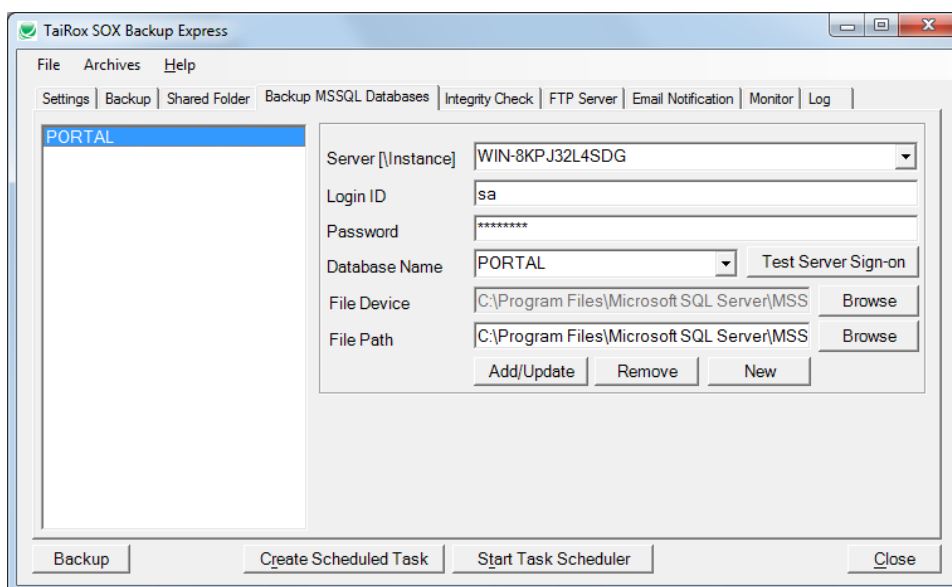
**Number of Archives to Keep:** Specify the maximum number of archives to be retained. If this number is exceeded, the oldest archive(s) will be deleted. Deleting old archives helps manage total disk space in an automated fashion.

## Backup/Restore MSSQL Databases Tab

The Backup/Restore MSSQL Databases tab lets you specify other SQL databases that you want to back up or restore in this job.

The tab name changes depending on the mode – either Backup or Restore – that you choose on the Settings tab.

Note that SQL Server credentials must be entered for every SQL database.



### To Specify an MSSQL Database to Back Up or Restore:

- Select or enter the **Server Instance** where the Sage 300 databases are stored.

**Note:** When the Server dropdown button is clicked, please wait several seconds while a list of accessible server instances is discovered.

- Enter the **SQL Server login ID** and **Password**.

You will need to know a SQL Server login name.

SOX Backup connects directly with one or more SQL Server instances, so the SQL Server credentials must be entered for each database connection.

- Select the **Database Name** that you are backing up or restoring.

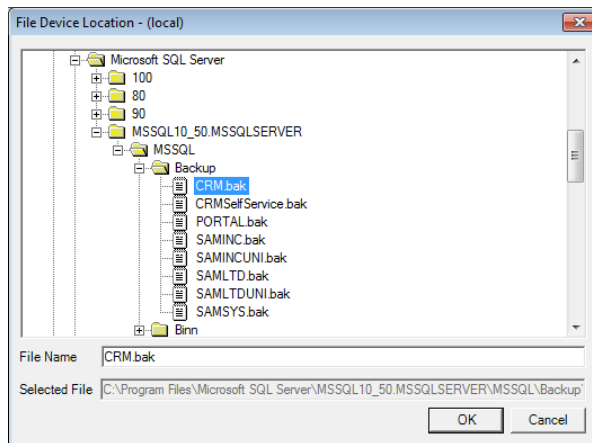
- Browse to the File Device and select/specify a file name for the backup or restore procedure.
- Browse to the File Path and select/specify a file name for the backup or restore procedure.

**Note:** The Browse buttons for File Device and File Path display subtly different tree-views used to select the backup file name.

**File Device** presents a SQL Server tree-view, relative to the server (shown below).

**File Path** presents the typical explorer tree-view, relative to the computer on which SOX Backup is running.

**If SOX Backup is running on a computer other than the SQL Server's computer,** then File Path would be the UNC path to the File Device.



- Click the **Test Server Sign-on** button.
- Click the **Add/Update** button to add the database to the list on the left side of the form. Click the Remove button if you are removing a database backup or restore entry.

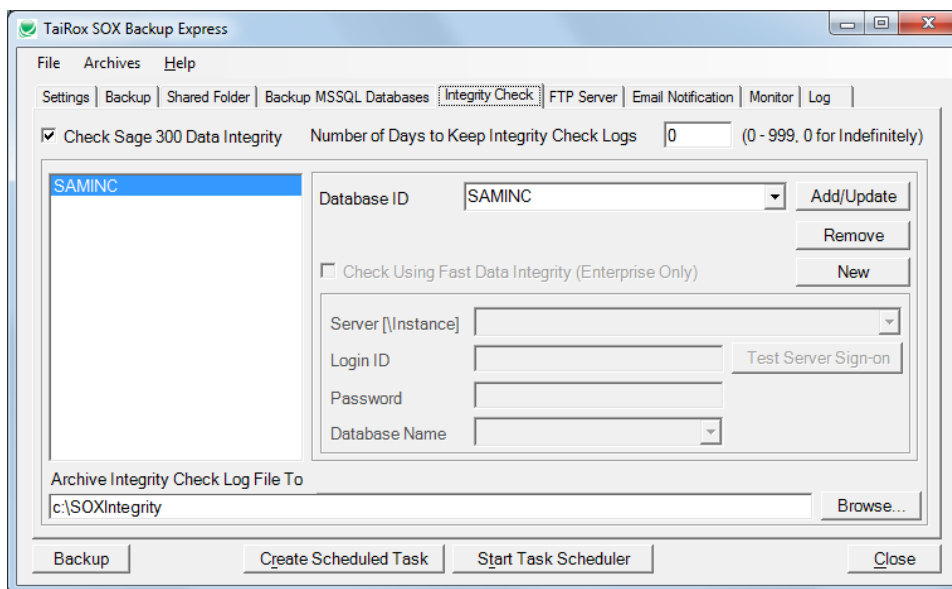
**Note Regarding Backup Size:** Sage 300 databases are dumped in DBDump format and are therefore greatly reduced in size. A SQL Server database will not be reduced in size this way.

If you include larger databases in a daily archive will affect how many archives can be kept in a fixed amount of disk storage.

## Integrity Check Tab

The Database Integrity Checker can be run for any number of databases that you are restoring. You can also be set up integrity checking as an independent job.





**Check Sage 300 Data Integrity:** Select this checkbox if you want to check integrity as part of this Backup/Restore job.

**Number of Days to Keep Integrity Check Logs:** Enter the number of days. Enter 0 to keep them indefinitely.

#### **Add/Remove Sage 300 System and Company Databases from the integrity check list**

These databases will be backed up / restored using Sage 300 DBDump and DBLoad utilities.

If you are running SOX Backup Express, you can check integrity using TaiRox Fast Data Integrity.

#### **To Add a system or company database to the check integrity list:**

- Click the Database ID dropdown to see the Sage 300 databases that are available in the share folder listed on the Settings tab.
- Click the Add/Update button to add it to the list on the left side of the form.

#### **To Remove a system or company database from the check integrity list:**

- Select the Sage 300 company or system database from the list on the left side of the form.
- Click the Remove button to remove it from the list on the left side of the form.

#### **Check Integrity Using Fast Data Integrity – SOX Backup Enterprise only**

If you have SOX Backup Enterprise, you can use TaiRox Fast Data Integrity to verify a restored database.

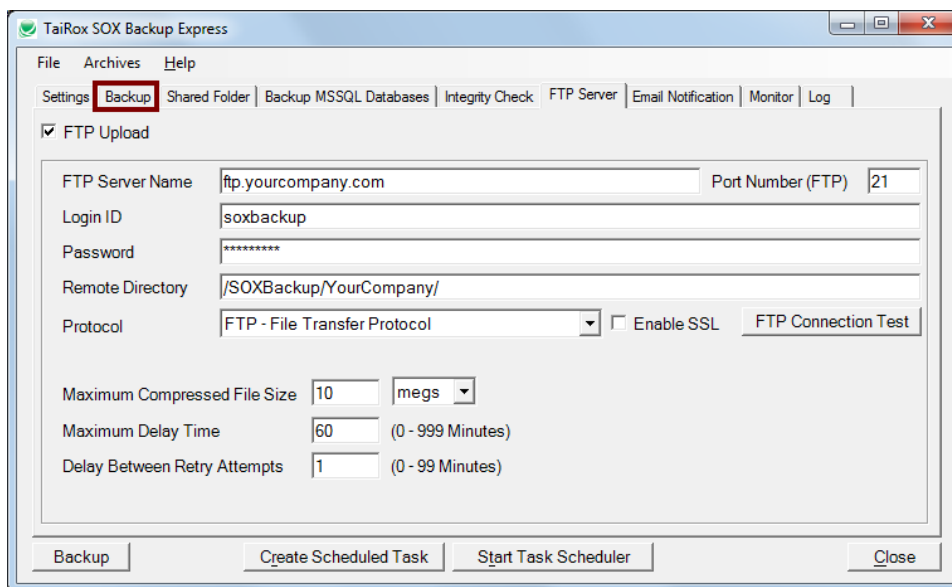
**Archive Integrity Check Log File To:** Specify the folder where you want to store the integrity check log files.

## FTP Server Tab

SOX Backup Express lets you zip an archive into “small” pieces and copy it to an FTP site – providing a way to automate offsite backups.

**Note:** This tab appears only when doing a backup.

You must provide the FTP credentials as well as settings to control retry wait time after a failure.



*Checkboxes outlined in red appear when you are restoring (downloading) files.*

**FTP Upload checkbox:** Select this checkbox if you want to upload files to an FTP site as part of a Backup job.

### FTP Credentials

Enter the FTP Server Name, Login ID and Password, and directory on the FTP site where you store backups.

### File Transfer Protocol

Select the file transfer protocol and security level. Note that the Enable SSL option will connect using an FTPS protocol, not an SFTP protocol.

**Important Note Regarding FTP, FTPS and SFTP Protocols:** The default protocol is FTP. If this protocol is selected, and Enable SSL is checked, SOX Backup will use a variant of this protocol, FTPS, to connect. This protocol is considered “more secure”.

The SFTP protocol is always secure. If you choose SFTP, the Enable SSL option will not appear.

Protocol	<input type="text" value="FTP - File Transfer Protocol"/> <input type="checkbox"/> Enable SSL <input type="button" value="FTP Connection Test"/>
	<input type="text" value="FTP - File Transfer Protocol"/> <input type="text" value="SFTP - SSH File Transfer Protocol"/>

## FTP File Size and Retry Settings

The default retry settings are reasonable for an overnight backup window of several hours, with occasional outages of several minutes.

If the FTP connection is very intermittent or poor, choose a smaller Maximum Compressed File Size than the default of 10Mb to speed up the total job time.

When the FTP connection fails, the “Delay Between Retry Attempts” setting controls the initial retry wait time (1 minute by default).

For continued failures, the retry wait time will double until the Maximum Delay Time setting is reached (2 minutes, 4 minutes, and so on). Once a successful transfer is completed, the retry wait time will be reset to the initial setting (for example, 1 minute).

## Email Notification Tab

The Email Notification tab settings control how email notifications are sent.

The default settings are shown here (a gmail account provided for use by SOX Backup). Another common setup style would be to use the same setup as Outlook would use from the server – same SMTP server, same port number (default would be 25), same user and password.

The screenshot shows the 'Email Notification' tab in the TaiRox SOX Backup Express application. The window title is 'TaiRox SOX Backup Express'. The menu bar includes 'File', 'Archives', and 'Help'. The main menu includes 'Settings', 'Backup', 'Shared Folder', 'Backup MSSQL Databases', 'Integrity Check', 'FTP Server', 'Email Notification', 'Monitor', and 'Log'. The 'Email Notification' section is checked. The settings are as follows:

- Mail Server (SMTP): smtp.gmail.com
- Port Number (SMTP): 587
- Enable SSL: checked
- Account Name: notifications@tairox.com
- Password: [masked with asterisks]
- Mail To: [empty field]
- Mail From: notifications@tairox.com
- Subject: %Task %DateTime %Status

Buttons at the bottom of the settings section include 'Reset Email Settings' and 'Send Test Email'. At the bottom of the window, there are buttons for 'Backup', 'Create Scheduled Task', 'Start Task Scheduler', and 'Close'.

**Mail To:** You can include any number of email addresses, separated by commas or semi-colons.

**Subject:** Use any subject line you want.

The codes %Task, %DateTime and %Status will be replaced respectively by the Task Name on the Server Tab, the Date and Time that the job completes and the Status of the job (SUCCESS or FAILURE). For compatibility reasons %Job will be treated the same as %Task.

**Reset Email Settings button:** Returns the settings to the defaults shown here, with the appropriate password for notifications@tairox.com.

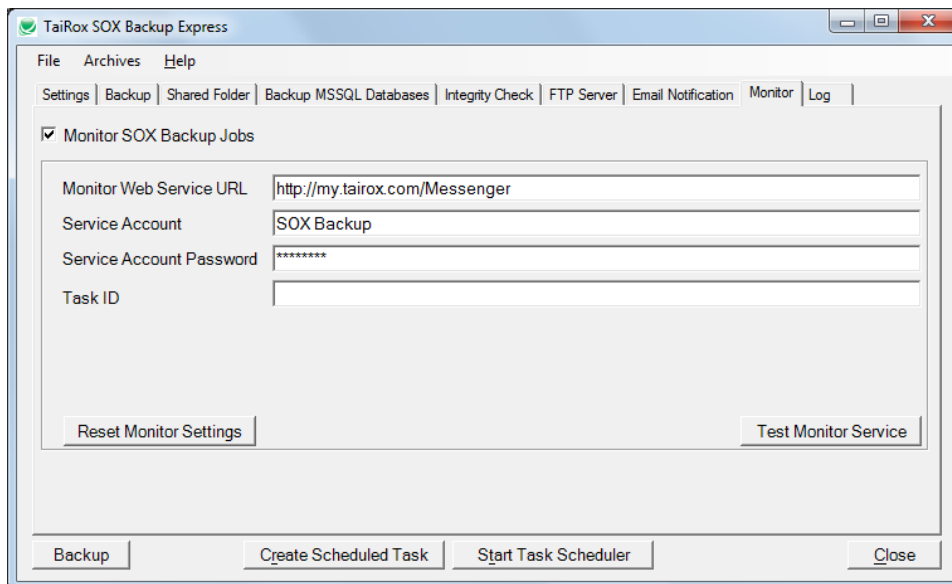
**Send Test Email:** Sending a test email will display a pop-up message. If the test email fails click on the log tab for further details about why sending the test email failed.

## Monitor Tab

The Monitor tab provides a mechanism to have TaiRox or a business partner monitor jobs.

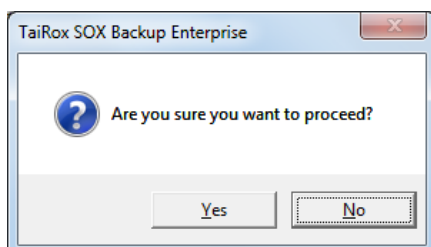
The important aspect of this is that if the Windows Scheduled Task for a SOX Backup job does NOT run, there will be no FAIL email notification sent. This can occur if rights or passwords are changed or expire (a Windows Scheduled Task should be run by an administrative account whose password does not expire).

The TaiRox portal will know that a job was expected to send it a message in a certain time frame but did not.

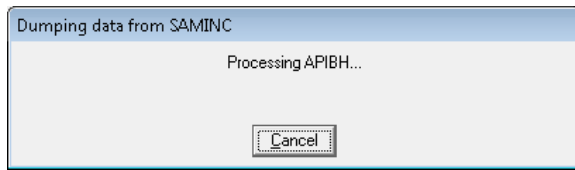


## Testing Your Setup

To test the backup or restore settings, click the Backup/Restore button in the lower left corner of the screen. The following confirmation message will appear:



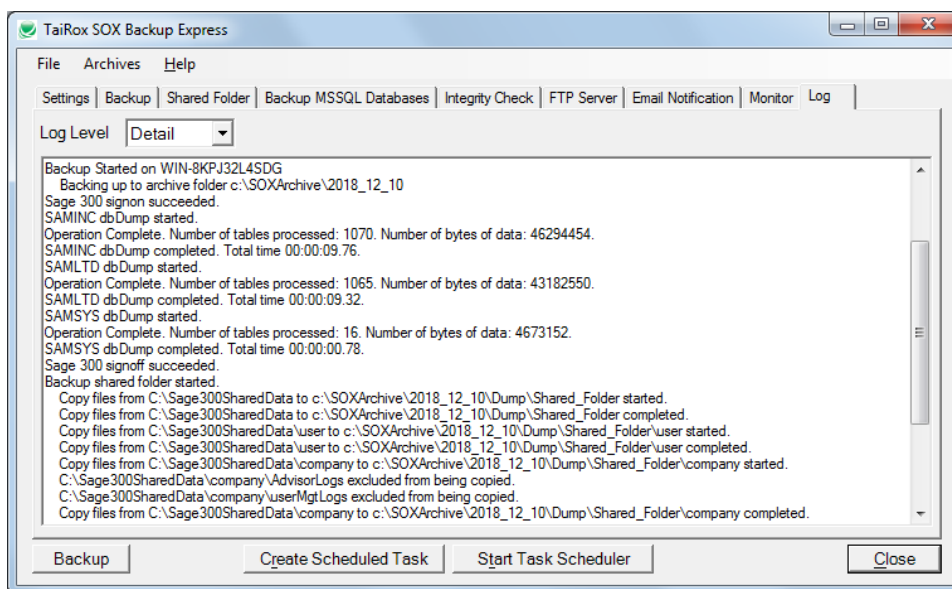
Click the Yes button to run the Backup/Restore operation immediately. Various progress windows will appear while the operation proceeds,



## Log Tab

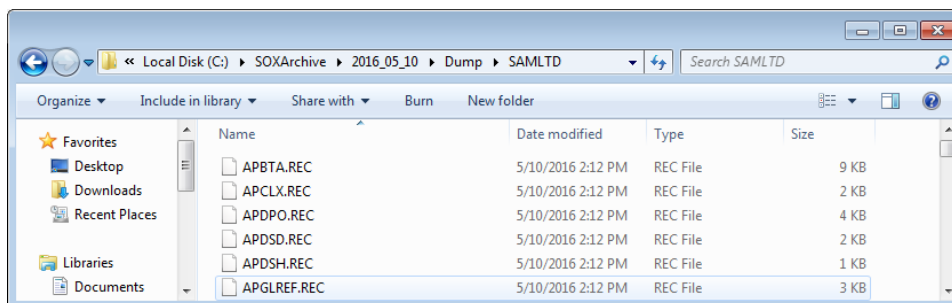
When you run the Backup or Restore operation from the user interface, SOX Backup will display the Log tab, letting you monitor the progress of the Back/Restore operation.

You can choose to view a Summary or Detail log on the Log tab.



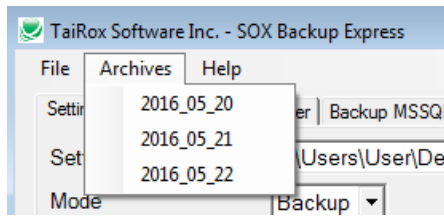
## Viewing the Archive Folder during Testing

You may wish to view the Archive folder as a way of seeing the resulting files:



## The Archives Menu

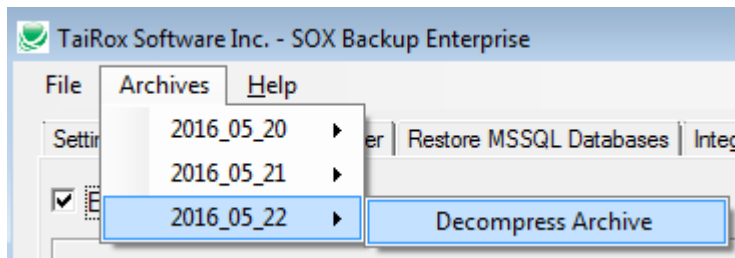
When there are no archives stored in compressed mode, the Archives menu merely provides a list of archive folder names:



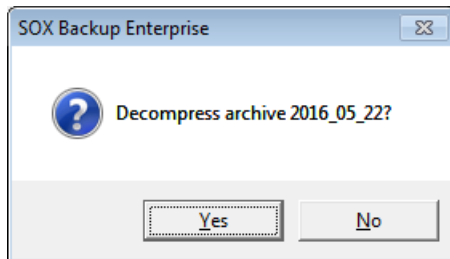
However, the SOX Backup Express restore operation from an FTP site also allows archives to be stored in compressed mode. When this option is selected, the Archives menu provides a way to decompress the archive, unzipping the files into DBDump format.

## To Unzip the Archive

From the SOX Backup menu, select **Archives > compressed archive > Decompress Archive**



The program will prompt you to confirm the operation:



## Create Scheduled Task

SOX Backup will create a basic task with that can be managed with the Task Scheduler. The task will have the Task Name on the SOX Backup Setting tab.

We are providing this feature so that the Task Scheduler's Action tab will be populated with the path to the SOX Backup program and also populated with the current XML path and name. These are the most common errors made by Sage 300 consultants not familiar with the Task Scheduler.

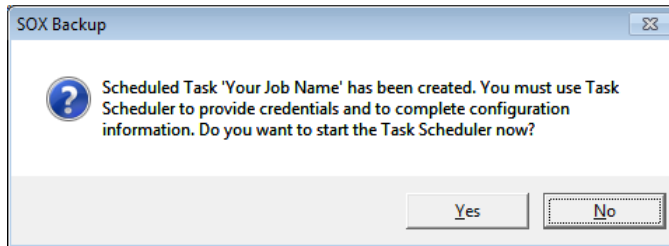
**Important Notes:** You **MUST** edit the task created by SOX Backup in the Windows Task Scheduler to provide credentials for the task – otherwise it will not run. Other important options also need to be set up properly.

Consult Task Scheduler documentation for important details beyond the scope of this document.

## Using the Create Scheduled Task Button

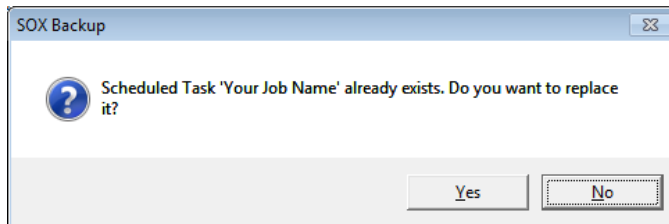
Fill in the fields for SOX Backup and run it manually before creating the scheduled task to ensure that the XML file is properly set up.

- **Click the Create Scheduled Task button to create the task.** The following message will appear:



- Click Yes to start the Windows Task Scheduler.

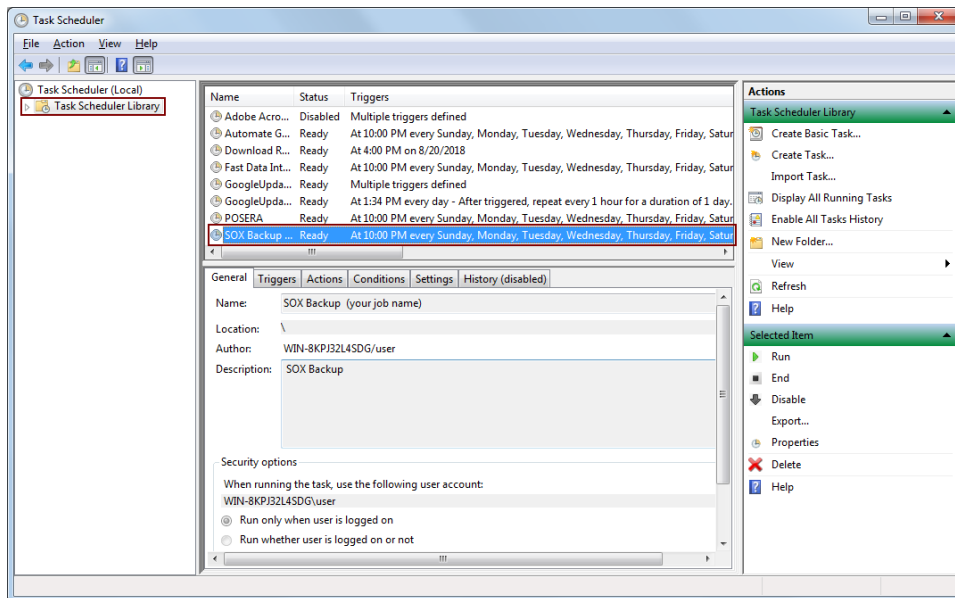
If a task with the same name already exists, the program will warn you that the task exists.



**Note** that replacing the task means not retaining **any** existing task settings:

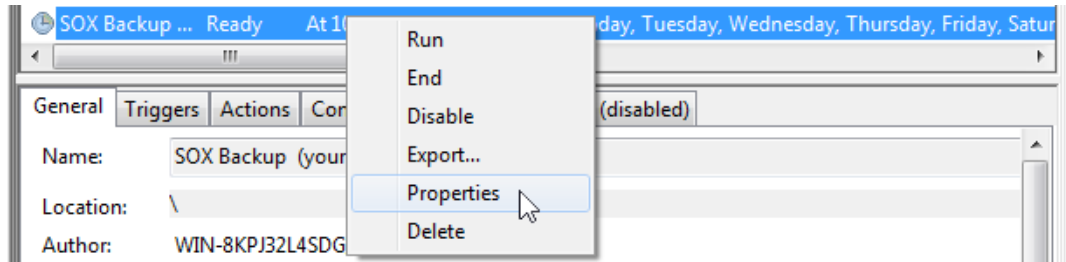
- **Click the Start Task Scheduler button to open the Task Scheduler window.**

The Task Scheduler varies in appearance from one version of Windows to another.



- **Click the “Task Scheduler Library” folder in the left panel, and then select the task you just created in the middle panel.**
  - Right-click the task entry and select **Properties** to edit the task settings.

**You MUST edit the properties to add the task user account password.** When you save the properties, the program will ask you to provide the password for the task user.



If the task does not run properly after set up, the problem is usually that some authentication has failed.

**Some hints:**

- The scheduler requires a user and password. Create Scheduled Task created the task with a task user, but it did not add the task user's password.  
You must edit the task properties to specify the password (when you click Save).  
You can also change the task user when you edit the task properties.
- An experienced Windows IT person should be able to solve any problems.
- Your error has occurred before – do an internet search specifying the error message.