SOX Backup Express

User Guide

SOX Backup Express Summary

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.

For more functionality, SOX Backup <u>Enterprise</u> 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 on 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.

NOTE: This User Guide discusses the backup and restore procedures separately.

Backing Up Databases
Restoring Databases

The **Mode** dropdown box on the Settings tab lets you choose between a backup job and a restore job.
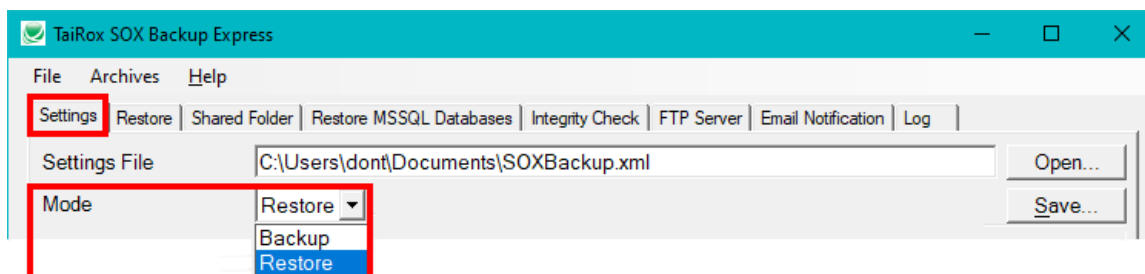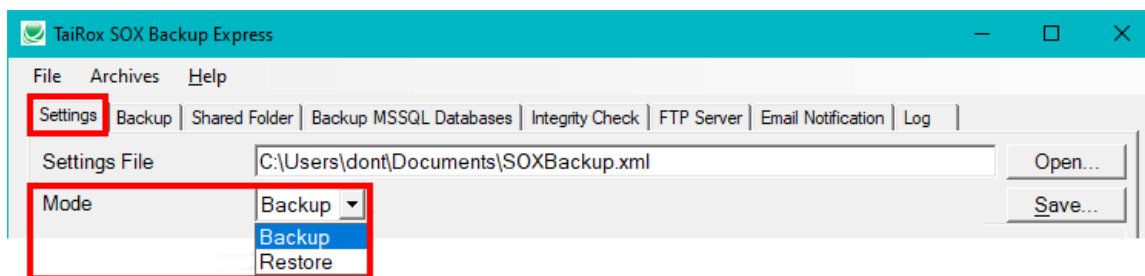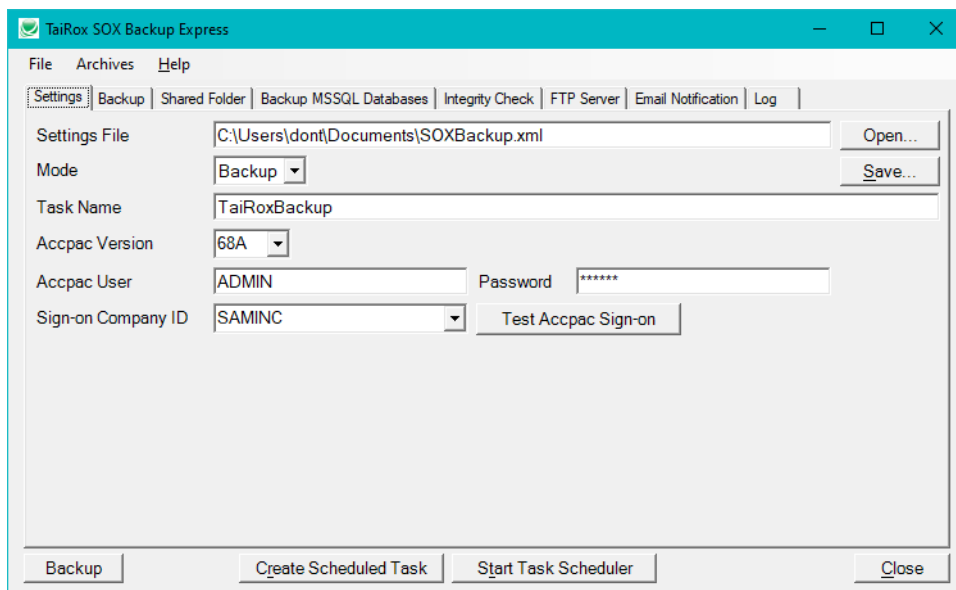
You can see that several tabs are named differently for backup and restore procedures.

Backing Up Databases

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.

This means that you can create different jobs for backing data, restoring data, and checking data integrity.

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

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 – in this case, 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*.
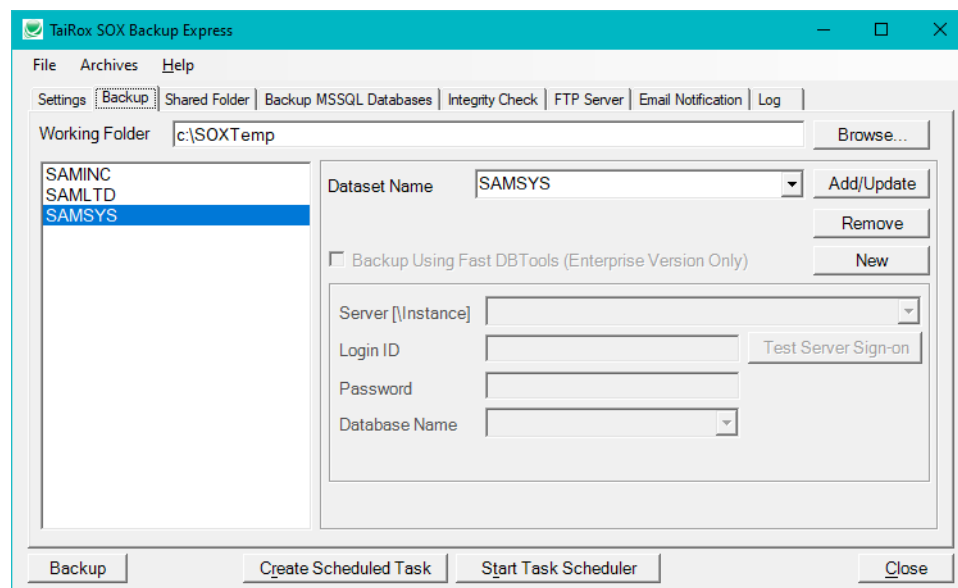
Click the Test Accpac Sign-on button to check access.

A success or fail message will appear as follows:
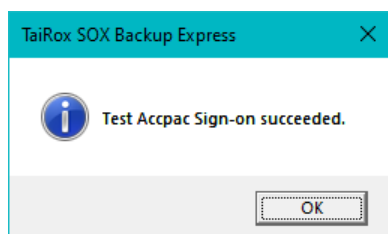
Backup Tab

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

If you are restoring databases, go to the Settings tab to change the "mode" to "Restore". See Restoring Databases and Restore Tab for more information.

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.

If you have SOX Backup Enterprise, you can use the Fast DBTools option to back up a database. It performs DBDump and DBLoad operations approximately 3x faster than Sage 300 utilities.

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

- Click the *Dataset Name* dropdown to see the list of Sage 300 databases.
- Select a database in the dropdown.
- Click the Add/Update button to add the database to the list on the left side of the form.

### To Remove a system or company database from the backup 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.

Shared Folder Tab

The Shared Folder tab lets back up and restore Sage 300 shared folders – 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 Sage 300 SharedData Folders.

However, if you are using SOX Backup to dump and load a single database to another DB name in the same server instance, you would not back up and restore shared folders.
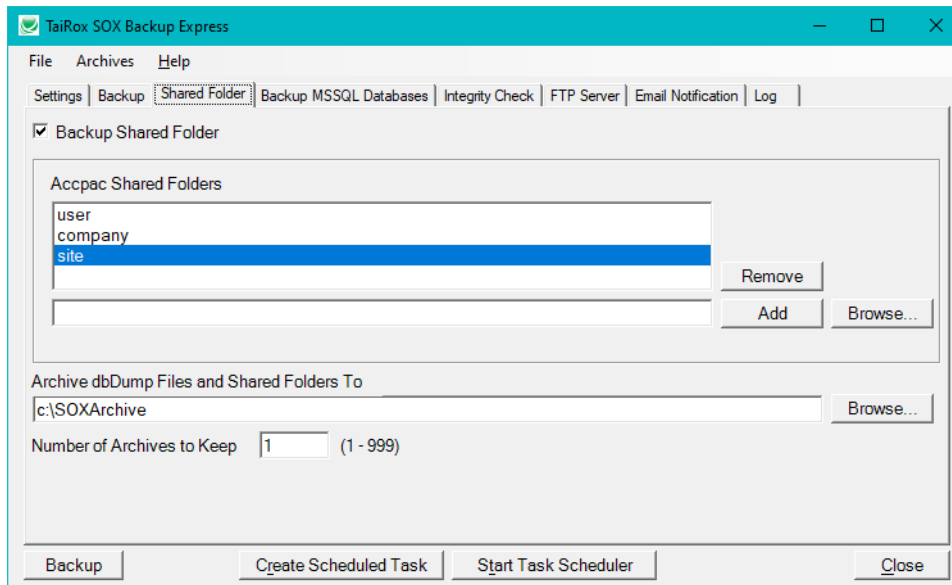
Backup Shared Folders checkbox: Select this checkbox to back up Sage 300 shared folders. Once you select the checkbox, you can use the browser to select folders that you want to back up.

SOX Backup Enterprise provides a similar checkbox for restoring – so you can omit restoring shared data folders that you backed up.

Accpac Shared Folders

To add a shared data folder to the list:

- Select the Backup Shared Folder checkbox.

- Click the Browse button beside the Add button.

- Navigate to the folder that you want to include in the backup, and click the OK button.

ImportTemplates	Add	Browse...

- Click the Add button to add the folder to the Shared Folders list.

To Remove a shared folder from the list:

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

Archive dbDump files and Shared Folders To

Specify the folder where you want the backups listed on the Backup tab – and the contents of shared folders – archived.

A new "Archive" is created whenever a backup job is run.

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 MSSQL Databases Tab

The Backup 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. *If you are restoring databases*, see Restore MSSQL Databases tab

Note that SQL Server credentials must be entered for every SQL database.
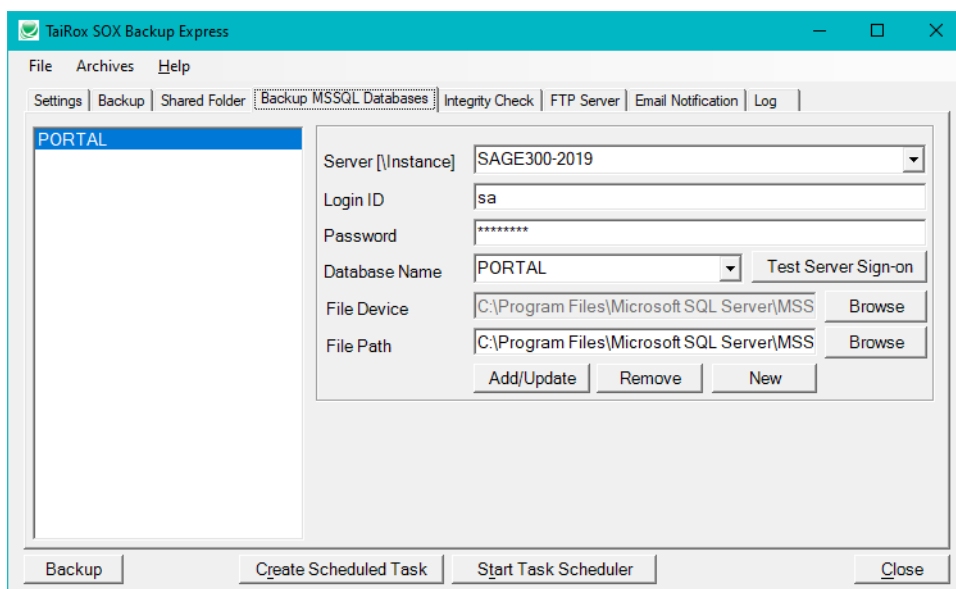
To Specify an MSSQL Database to Back Up or Restore:

Perform these steps for *each* MSSQL database that you want to back up.

- Select or enter the ***Server\Instance*** where the Sage 300 database is 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.

- Browse to the **File Device** and select/specify *for SQL Server* the backup file (e.g. PORTAL.BAK). SQL Server needs the file location <u>to perform a SQL backup</u>.
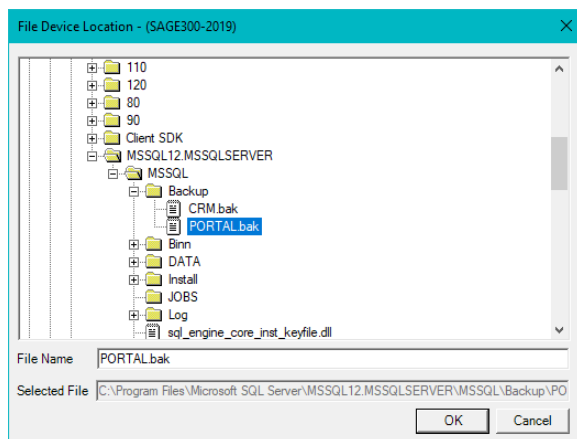
- Browse to the **File Path** and select/specify *for the SOX Backup program* the backup file name (e.g. PORTAL.BAK).

This will be the same file as the File Device that you specified, but possibly accessed from a different server. SOX backup needs this path <u>to copy and compress the backup file</u>.

Difference Between "File Device" and "File Path":

The File Device and the File Path both point to the same file. However, one describes the file location for SQL Server, and the other describes it for the SOX Backup program. The Browse buttons for File Device and File Path display subtly different tree-views used to select the backup file name.

- o **File Device** presents a SQL Server tree-view, relative to the computer where SQL Server is installed (shown above).
- o **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 different computer from the SQL Server computer, the File Path will be the UNC path to the File Device.

- Click the **Test Server Sign-on** button. The test will check both file paths.

- Click the ***Add/Update*** button to add the database to the list on the left side of the form.
  - o Click the Remove button to remove a database backup 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.

Database size will affect how many daily 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.
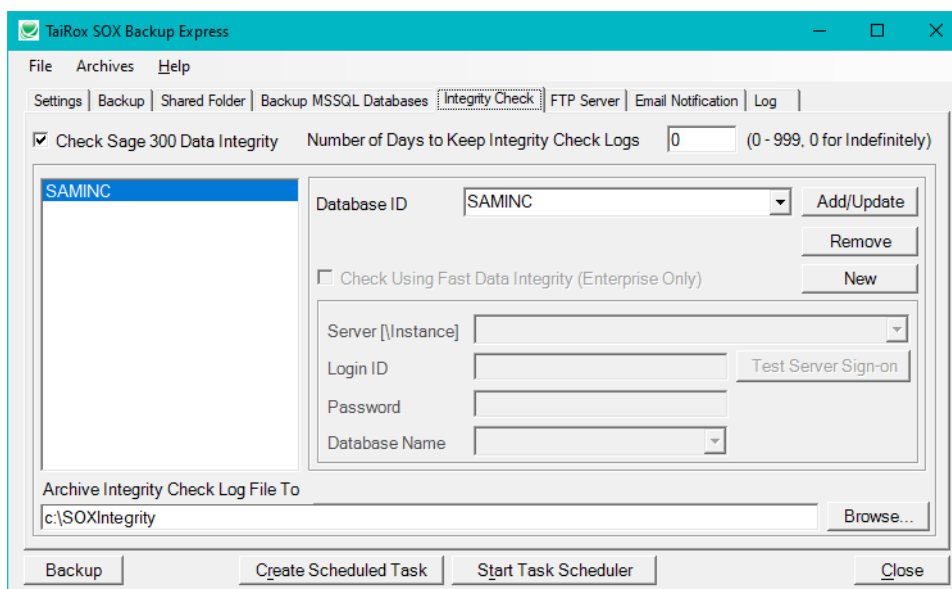
Check Sage 300 Data Integrity: Select this checkbox if you want to check integrity as part of this Backup/Restore job.

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.

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

- Click the Database ID dropdown to see the list of Sage 300 company databases.

- Select a database from the dropdown.

- Click the Add/Update button to add it to the list on the left side of the form.

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

   If you have <u>SOX Backup Enterprise</u>, you can use the Fast Data Integrity option to check the data integrity. It performs Sage 300 integrity checking in a fraction of the time taken by the Sage 300 Administrative Services function. This option is not available in SOX Backup Express.

To Remove a company database from the check integrity list:

- Select the Sage 300 company database from the list on the left side of the form.

- Click the Remove button to remove it from the list.

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.

You can also use this functionality to copy databases between two locations.

> **Note:** This tab appears only when doing a backup. If you need to restore from an FTP site, use SOX Backup Enterprise.

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

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.

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. You can turn email notifications on or off.

Select the Email Notification checkbox and enter the same settings that Outlook would use from the server – same SMTP server, same port number (default would be 25), same user and password. Click the Send Test Email button to check that the settings work.

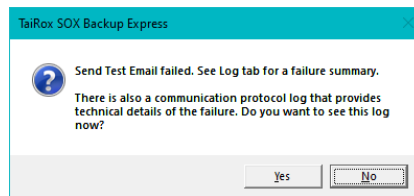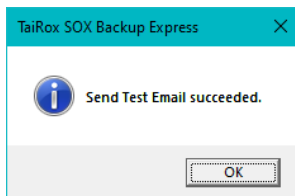You will need proper credentials that work from the computer running SOX Backup Express.

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 fails, check the log file by clicking the Yes button in the error message.

### Note regarding "Enable SSL" if unsupported by the SMTP server

If you select the "Enable SSL" checkbox, the program will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. The program will display an error message if the secure test fails, but the insecure test is successful.

If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The "Enable SSL" checkbox has different meanings for different email sending mechanisms, particularly older ones.)

- You should uncheck "Enable SSL" to send emails without SSL protection.

Testing Your Setup

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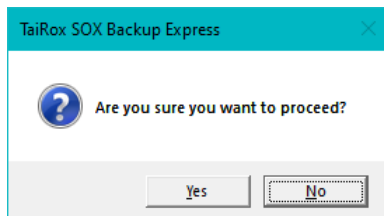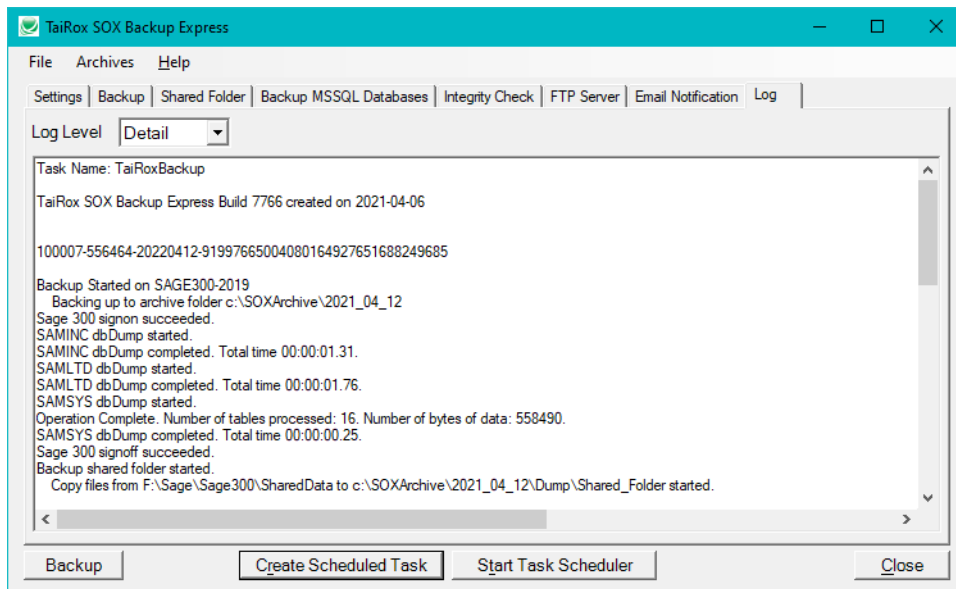

Click the Yes button to run the Backup operation immediately. Various progress windows will appear while the operation proceeds,
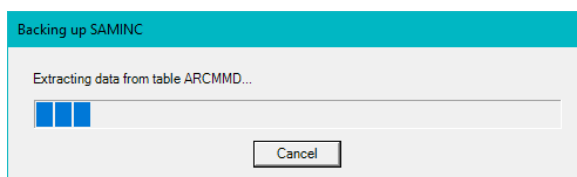
Log Tab

When you run the Backup operation from the user interface, SOX Backup will display the Log tab, letting you monitor the progress of the Backup operation.
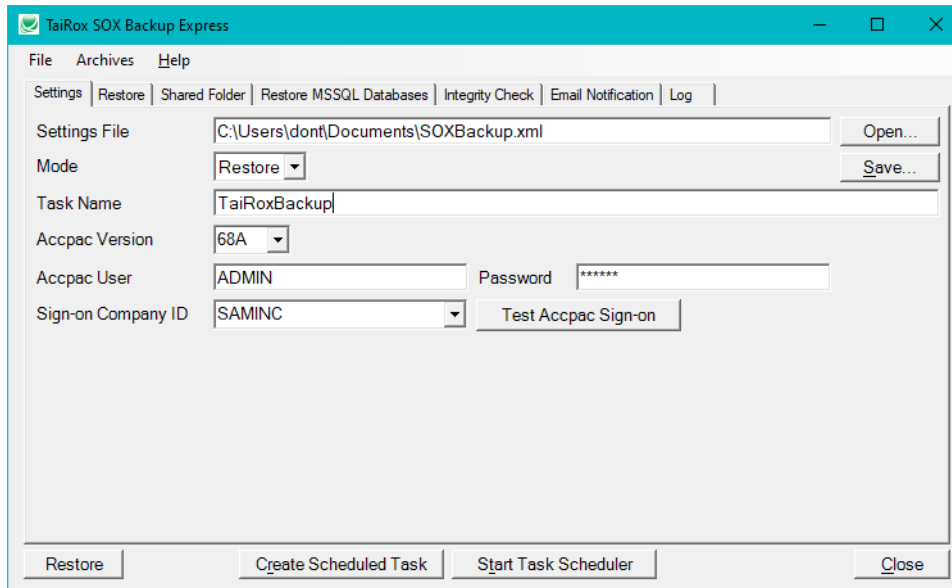
You can choose to view a Summary or Detail log on the Log tab.

Restoring Databases

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.

This means that you can create different jobs for backing data, restoring data, and checking data integrity.

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

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 – in this case, Restore 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 Regarding 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:
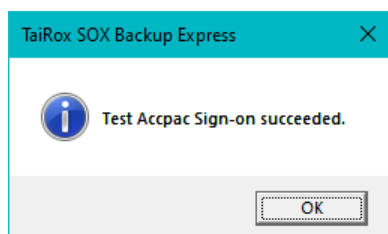
Restore Tab

The Backup tab lets you specify the Sage 300 system and company databases that will be backed up or restored in this job.
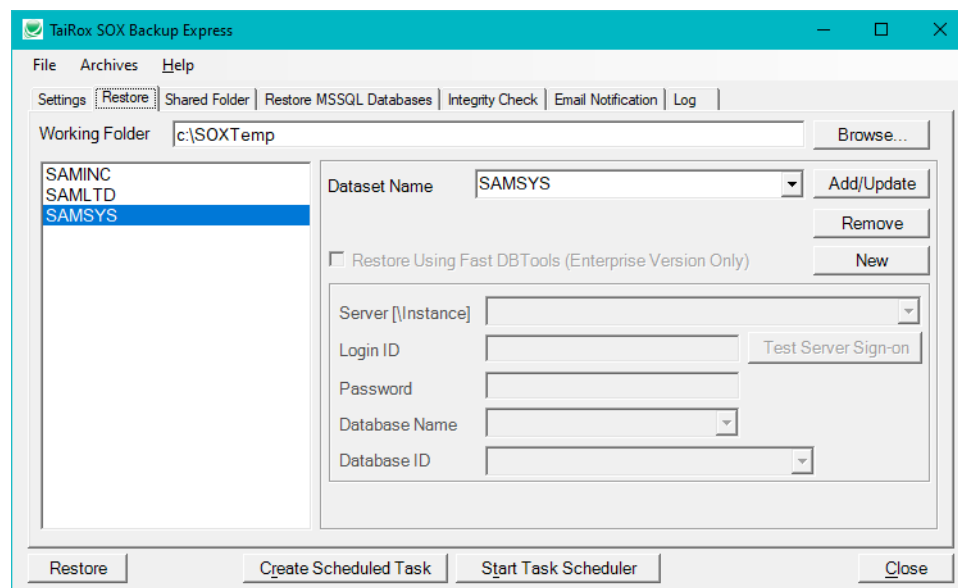
If you are backing up databases, go to the Settings tab to change the "mode" to "Backup". See Backing Up Databases and Backup Tab for more information.

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.

If you have <u>SOX Backup Enterprise</u>, you can use the Fast DBTools option to restore a database. It performs DBDump and DBLoad operations approximately 3x faster than Sage 300 utilities.

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

- Click the *Dataset Name* dropdown to see the list of Sage 300 databases.

- Select a database in the dropdown.

- Click the Add/Update button to add the database 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.

Shared Folder Tab

The Shared Folder tab lets back up and restore Sage 300 shared folders – 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 Sage 300 SharedData Folders.
>
> However, if you are using SOX Backup to dump and load a single database to another DB name in the same server instance, you would not back up and restore shared folders.
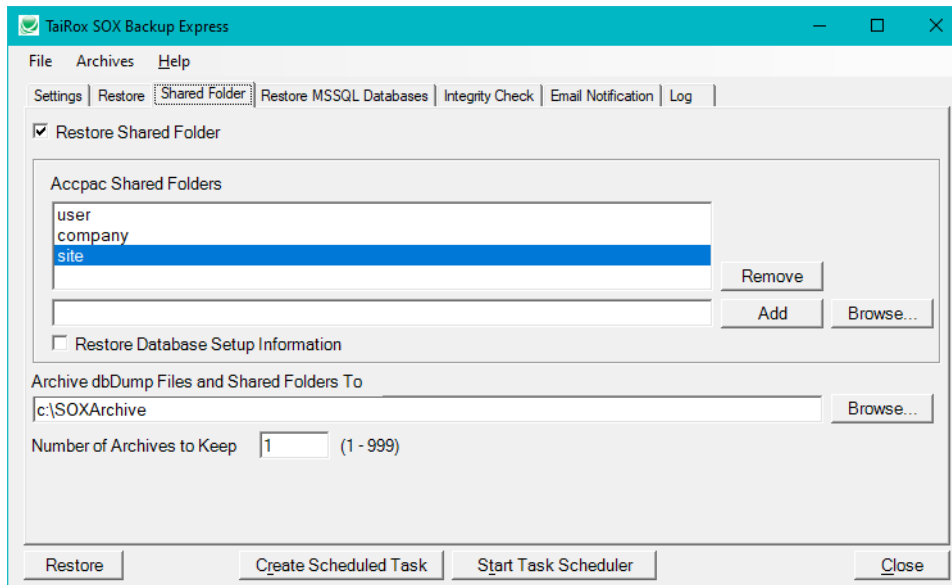
Restore Shared Folders checkbox: Select this checkbox to backup or restore shared folders. Once you select the checkbox, you can use the browser to select folders that you want to restore.

Accpac Shared Folders

To add a shared data folder to the list:

- Select the Backup Shared Folder checkbox.

- Click the Browse button beside the Add button.

- Navigate to the folder that you want to include in the backup, and click the OK button.

ImportTemplates	Add	Browse...

- Click the Add button to add the folder to the Shared Folders list.

To Remove a shared folder from the list:

- Select the shared folder that you what 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.

Restore MSSQL Databases Tab

The 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. *If you are backing up databases*, see Backup MSSQL Databases Tab.

Note that SQL Server credentials must be entered for every SQL database.
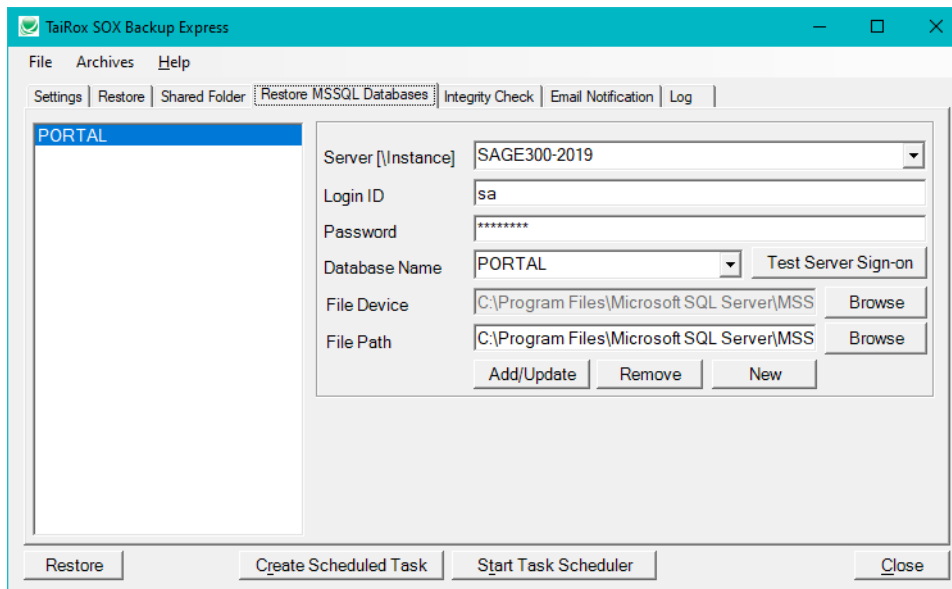
To Specify an MSSQL Database to Back Up or Restore:

Perform these steps for *each* MSSQL database that you want to restore.

• Select or enter the *Server\Instance* where the Sage 300 database is 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 *for SQL Server* the restore file name (e.g. PORTAL.BAK). SQL Server needs the file location to perform a SQL restore.
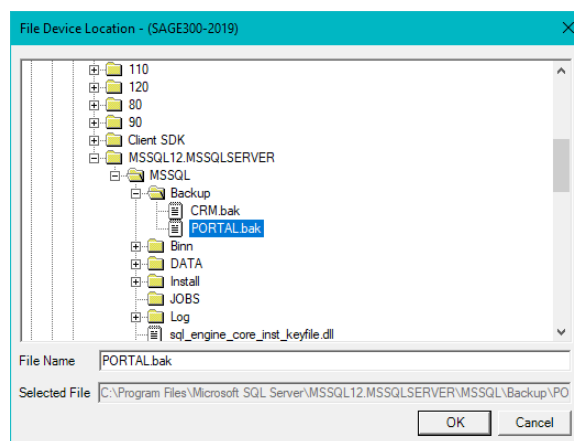
• Browse to the **File Path** and select/specify *for the SOX Backup program* the restore file name (e.g. PORTAL.BAK).

This will be same file as the File Device that you specified, but possibly accessed from a different server. SOX backup needs this path to copy and uncompress the file.

Difference Between "File Device" and "File Path":

The File Device and the File Path both point to the same file. However, one describes the file location for SQL Server, and the other describes it for the SOX Backup program. The Browse buttons for File Device and File Path display subtly different tree-views used to select the backup file name.

- o **File Device** presents a SQL Server tree-view, relative to the computer where SQL Server is installed (shown above).
- o **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 different computer from the SQL Server computer, the File Path will be the UNC path to the File Device.

- Click the **Test Server Sign-on** button. The test will check both file paths.

- Click the *Add/Update* button to add the database to the list on the left side of the form.

 - o Click the Remove button to remove a database 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.

Database size will affect how many daily 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. You can run an integrity check:

- As part of a backup job.

- After restoring Sage 300 databases.

- As an independent job unrelated to backing up or restoring.
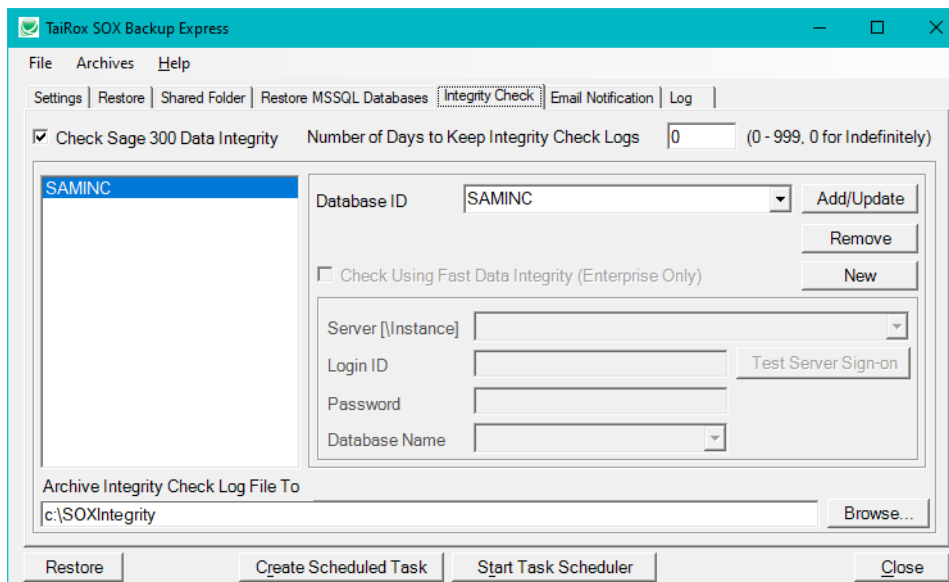
Check Sage 300 Data Integrity: Select this checkbox if you want to check the integrity of one or more Sage 300 databases.

You can check integrity as part of a backup or restore job, or as a job unrelated to backing up or restoring data.

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 restored using Sage 300 DBDump and DBLoad utilities.

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

- Click the Database ID dropdown to see the list of Sage 300 company databases.

- Select a database from the dropdown.

- Click the Add/Update button to add it to 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 the Fast Data Integrity option to check the data integrity. It performs Sage 300 integrity checking in a fraction of the time taken by the Sage 300 Administrative Services function.

    This option is not available in SOX Backup Express.

To Remove a company database from the check integrity list:

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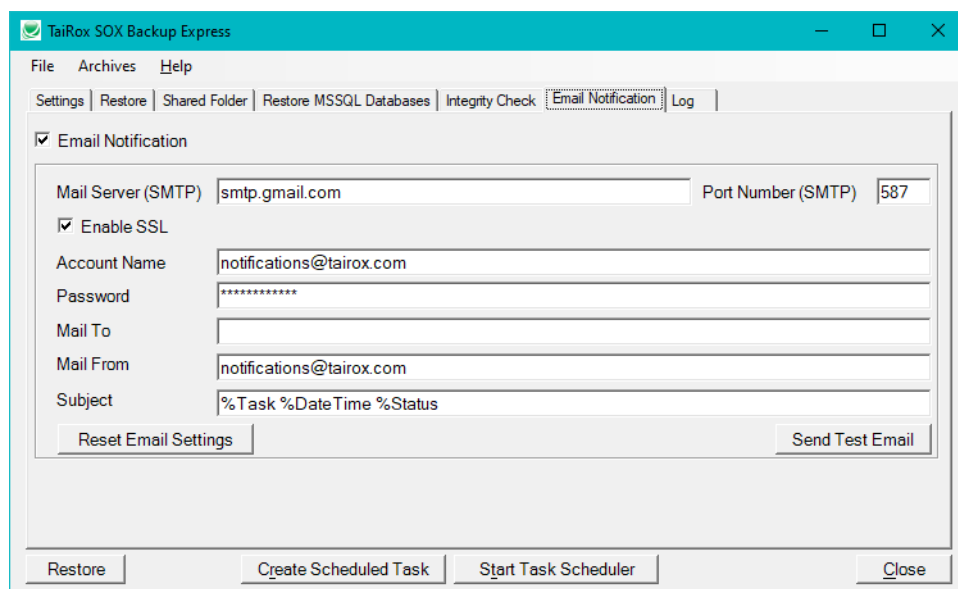
- Click the Remove button to remove it from the list.

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

Email Notification Tab

The Email Notification tab settings control how email notifications are sent. You can turn email notifications on or off.

Select the Email Notification checkbox and enter the same settings that Outlook would use from the server – same SMTP server, same port number (default would be 25), same user and password. Click the Send Test Email button to check that the settings work.

You will need proper credentials that work from the computer running SOX Backup Express.
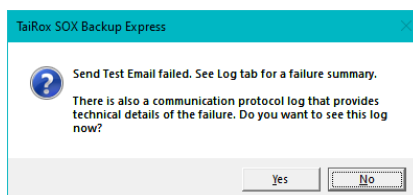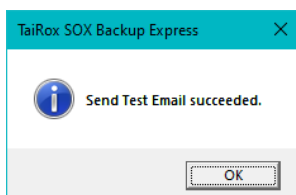
Mail To: You can include any number of email addresses, separated by commas or semi-colons.

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 fails, check the log file by clicking the Yes button in the error message.

### *Note regarding "Enable SSL" if unsupported by the SMTP server*

If you select the "Enable SSL" checkbox, the program will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. The program will display an error message if the secure test fails, but the insecure test is successful.

If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The "Enable SSL" checkbox has different meanings for different email sending mechanisms, particularly older ones.)

- You should uncheck "Enable SSL" to send emails without SSL protection.

Testing Your Setup

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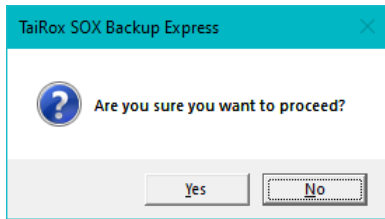

Click the Yes button to run the Restore operation immediately. Various progress windows will appear while the operation proceeds,
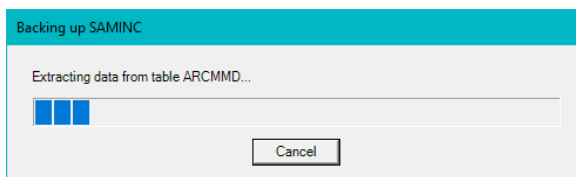
Log Tab

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.
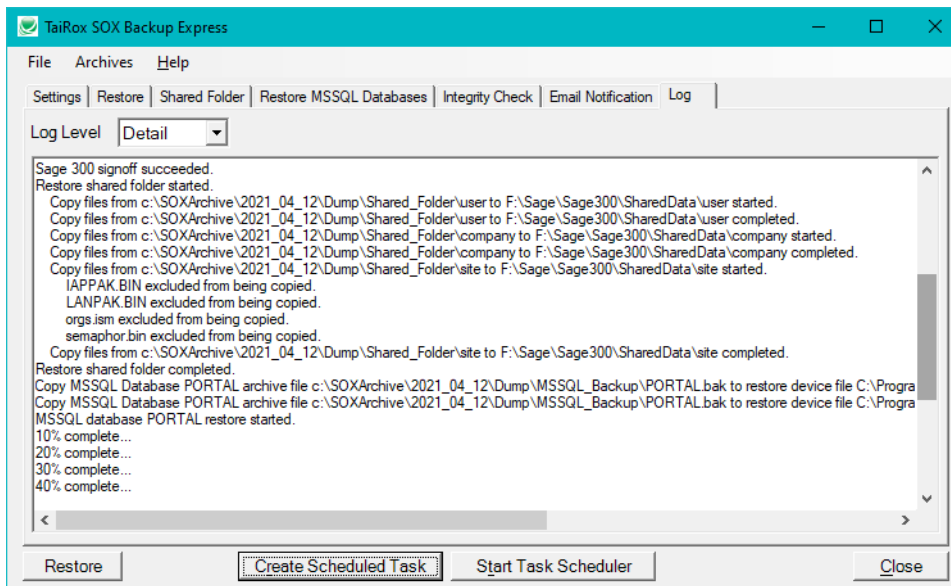
Viewing the Archive Folder during Testing

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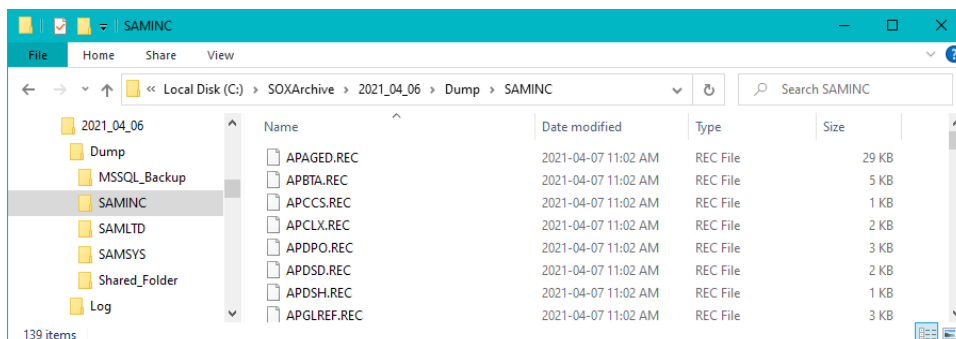
The Archives Menu

When there are no archives stored in compressed mode, the Archives menu merely provides a list of archive folder names:
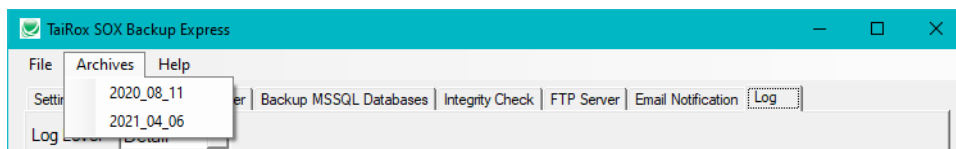
If you have compressed archives, the Archives menu provides a way to decompress the archive, unzipping the files into DBDump format.

To Unzip a compressed Archive

From the SOX Backup menu, select **Archives > *compressed archive* > Decompress Archive**
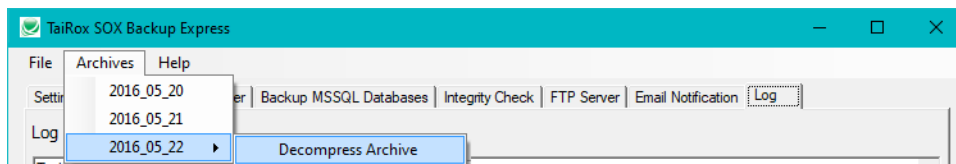
The program will prompt you to confirm the operation:

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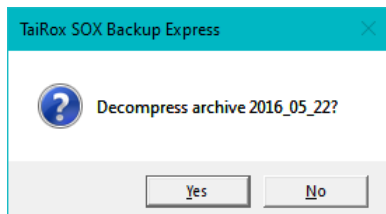
> **Important Notes:** You **MUST** edit the task created by SOX Backup in the Windows Task Scheduler to provide credentials for the task – otherwise it will not run. Other important options also need to be set up properly.

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:
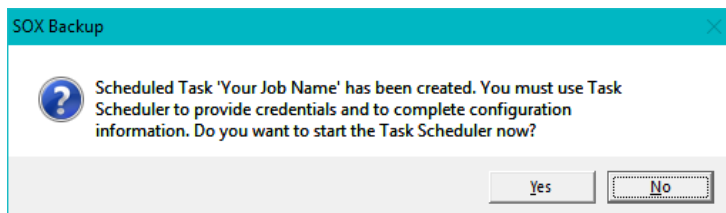
  o   Click Yes to start the Windows Task Scheduler.

  If a task with the same name already exists, the program will warn you that the task exists.
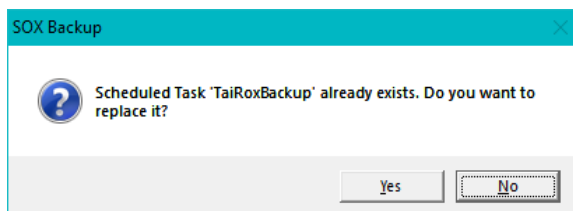
  Note that replacing the task means not retaining *any* existing task settings:

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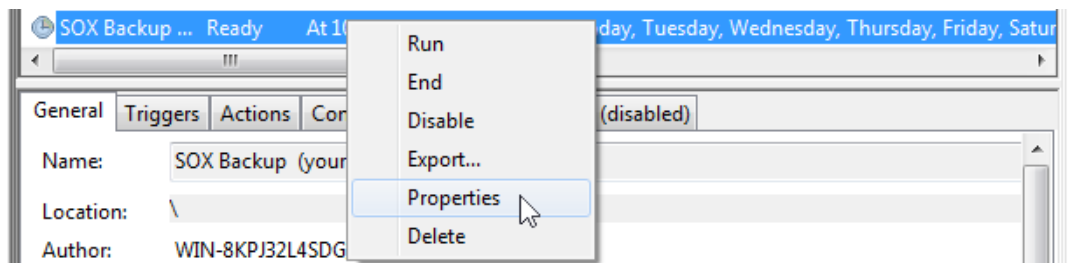
If the task does not run properly after set up, the problem is usually that some authentication has failed.

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.

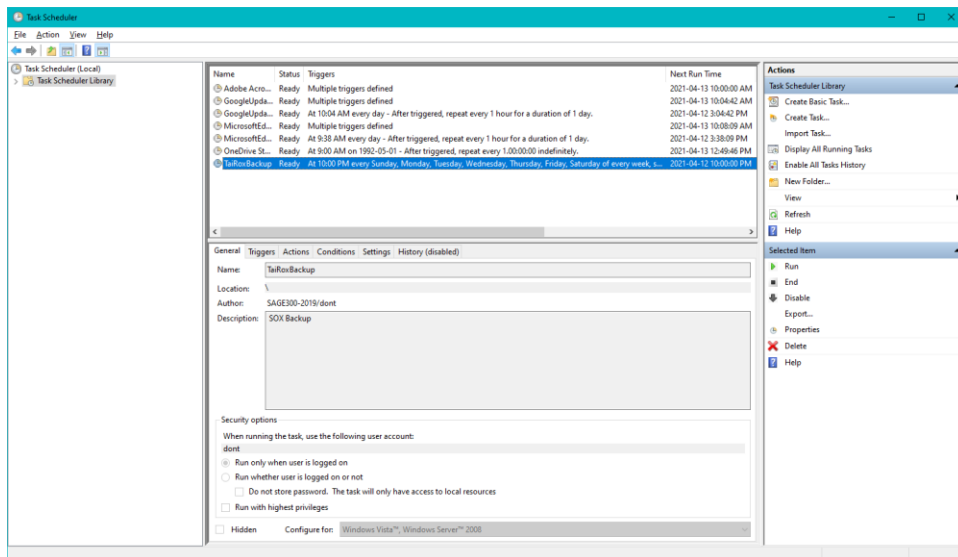 You must edit the task properties to specify the password (when you click Save).

  You can also change the task user when you edit the task properties.

- Change security options to run the task whether the user is logged on or not.
- Set the task to run with the highest privileges.
- 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.

Troubleshooting Sox Backup Task Issues

Check the following settings for the scheduled windows task:

- If the path to the XML file has blanks and there are no quotes (") around the path+file name.

- That the user account for the task has logged onto the machine running the task and has a user profile.

- That you selected "Run whether user is logged on or not".

- That other task settings – e.g. run with highest privileges – have been properly set up.

  Note: Make sure that your user account can run Sox Backup interactively and can run a scheduled task. Even if using an Admin account, you may have to change Active Directory security settings to run the Sox Backup scheduled task with your account.

- Whether another task for SOXBackup.exe – created during testing – is already running. (Delete with Task Manager.)

Diagnosing Issues with Scheduled Tasks

If you are setting up as a Windows Scheduled Task, a good strategy is to set up a task and run it on a small test database first – such as SAMLTD. If that works, then set up your production database.

- Set up Sox Backup for the small test database (e.g. SAMLTD).

- ***Make sure that Sox Backup works interactively before you set up the scheduled task.***

- Create a task using the Create Scheduled Task button in Sox Backup to make sure that the paths are correct for the program and for the settings XML file. Incorrect path names are often the issue for tasks.

- Run the task from the Task Scheduler and see if it runs properly. This will prove that you have correct file names (with quotes if blanks are in paths).

- Set up the task to run in 5 minutes, then exit the Task Scheduler and log off. Check to see what happened in 6 minutes.

- Look at the Sox Backup logs.

- Check the history of the task in the Task Scheduler. If tasks are still running, delete them.

Now set up the real databases and schedule tasks to run overnight. Come back and check the next day.

- If the notification emails didn't arrive, you'll have to see where they are being blocked.

Example of Settings and Permissions Required to Run a Batch File from a Scheduled Task

See [Fix Scheduled Task -- from Help Desk Geek](#) for an example of the permissions and settings to check to fix a scheduled task that runs a batch file (*.bat). If you can't run a batch file with your account, you cannot run Sox Backup.

Sox Backup FAQ

Read the user guide carefully in addition to reviewing this FAQ. The user guide provides specific guidelines for configuring Sox Backup.

Issues with Running Sox Backup from a Task

See [Troubleshooting Sox Backup Task Issues](#) for more information on diagnosing task issues.

Installation and Upgrade Issues

Q: Where can I get release notes for Sox Backup, and what will they tell me?

A: Click the [Release Notes](#) link in the upper left hand corner of the Sox Backup product page on the TaiRox web site.

Among other things, the Release Notes will tell you about recent fixes and provide program compatibility information. For example:

```
Build 2020-03-19 (7383)
 - Allow email distribution lists to be split by blank, semicolon and comma.
   Status displayed is SUCCESS, not FAIL in subject line when retrying send of
emails.

Build 2020-01-24 (7328)
 - SOX Backup Enterprise now fast-checks RMA up to RMA 2020.
```

Email Notification Issues

Note regarding "Enable SSL" if unsupported by the SMTP server

If you select the "Enable SSL" checkbox, the program will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. The program will display an error message if the secure test fails, but the insecure test is successful.

If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The "Enable SSL" checkbox has different meanings for different email sending mechanisms, particularly older ones.)

- You should uncheck "Enable SSL" to send emails without SSL protection.

Q: Why did Gmail reject my login credentials from Sox Backup.

Sign-in attempt was blocked

👤 morgan.thomas@tairox.com

Someone just used your password to try to sign in to your account from a non-Google app. Google blocked them, but you should check what happened. Review your account activity to make sure no one else has access.
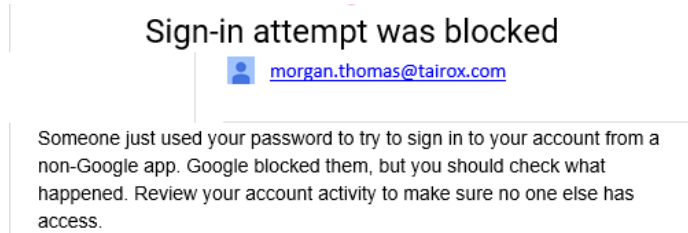
A: The server login was rejected because it didn't come from a "Google" application.

If you are using a Gmail server for email notifications, your server administrator can change the access restrictions to let Sox Backup send notifications. Refer to Google support for details.

See Google support – for example, https://support.google.com/cloudidentity/answer/6260879?hl=en

Q: What port number should I use for the SMTP server?

A: A "typical" setting would be port 465 with SSL enabled. See the note, above, regarding "Enable SSL".

The default SMTP server ports are as follows:

Default Ports:	Server:	Port:
SMTP Server (Outgoing Messages)	Non-Encrypted	25 (or 587)
	Secure (TLS)	587
	Secure (SSL)	465

Ports 465 and 587 are intended for email client to email server communication – sending out email using SMTP protocol.

Port 25 is generally used for communication between mail servers.

Backup Issues

Q: Why does Sox Backup hang when run as a scheduled task?

A: Check Troubleshooting Download Task Issues in this guide.

When the program is executed it uses a command-line parameter (an XML file name) to provide all configuration information for running.

If the XML filename parameter is missing from the command-line, the program starts and waits for you to provide further input – however, the Download Rates screen is hidden. If you open the Task Manager, you can see and end the task.

If the parameter is there but invalid, the program will generate an error and close (if running from the Task Scheduler).

Q: Why did the scheduled task for Sox Backup suddenly stop working?

A: Check the errors logged for the Windows task and try to run Sox Backup interactively to confirm that it still works. For example, one common reason for a sudden failure is that the license has expired.

Also check [Troubleshooting Download Task Issues](#) in this guide.

Q: FAIL: System Error. Exception occurred at SoxBackup. Error='The requested security protocol is not supported.'. Please ensure to install all the latest Windows Updates to enhance your computer's security and performance.

A: This error message originates from the .NET framework. You can Google the message to see suggestions from other users.

Check the versions of .NET Frameworks on your system and check that TLS 1.2 protocol is enabled on your server.

Note that although Sox Backup uses .NET Framework 4, you also require .NET Framework 4.5 be installed if you are using some of the newer security protocols (TLS 1.2 specifically). Many websites now require that TLS 1.2 or later be used in order to communicate with them.

Install all Windows updates for your platform. For example, Googling shows that early versions of Windows Server 2012 SR2 and Windows 8 had TLS1.2 issues with other applications, typical support / update article:

https://support.microsoft.com/en-ca/help/3140245/update-to-enable-tls-1-1-and-tls-1-2-as-default-secure-protocols-in-wi

Q: Why would we get this error? `"FAIL: Cannot read this version of the extraction file."`

A: Upgrade to latest version of Sox Backup. Older versions of SOX Backup used a 32 bit version of 7Zip to compress/decompress files and will fail if the backup is sufficiently large.

Q: I changed several settings in Sox Backup, then resaved the XML file under a new name. The name is correct in the UI, but the task continues to run as it did before the changes. What's going on?

A: The scheduled task is still using the previous XLM file. You have to edit the scheduled task in the Task Scheduler and specify a new file name on the Actions tab for the task properties.

Restore Issues

Q: I have a restore issue. Two databases are being transferred from one site to another but only one loads successfully. The following message appears in the log file. What is the problem?

2022-12-28 00:03:16 - FAIL: You cannot load data into the current company or system database.

A: A database restore operation can't be done if the database is locked (in use). Everyone needs to log out before they leave for the day.

Also note: SOX Backup signs in to a Sage Company (the "Signon Company") and can then restore databases to *other* companies – but not to the company where SOX Backup is signed in.

If you want to restore Company A and Company B, you should sign in to Company X in order to do so, not to Company A or B.