

Sandbox as a Backup

02/12/2024 2:51 pm EST

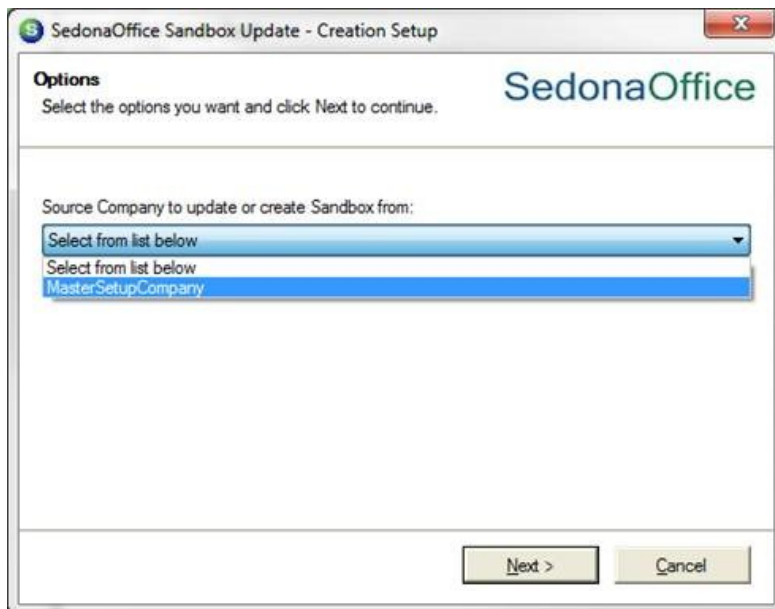
When creating a sandbox database as a backup for SedonaOffice, you have two options: Use the Sedona Sandbox Wizard or do a backup and restore on the SQL server followed by editing the SedonaMaster Company table.

To use the Sandbox Wizard:

Connect to your SedonaOffice SQL server and locate the SedonaOffice Server Tools located in the Windows start menu.



Select the Sandbox Wizard and choose Open.



Drop down the list and select the database you are making the backup from. This will typically be the database you've

been actively using. Press Next.

SedonaOffice Sandbox Update - Creation

Verify Database Path
Click Next to update or create a Sandbox test company.

SedonaOffice

Create or Update Sandbox from:
MasterSetupCompany

Path to Sandbox Database:
C:\Program Files\Microsoft SQL Server\MSSQL10_50.MSSQLSERVER\MSSQL\DATA\

Name of Sandbox Database:
Sandbox

< Back Next > Cancel

On this page change the Name of the Sandbox Database to the backup name (e.g. Yourcompany 2016). The rest generally can stay default. Select Next.

SedonaOffice Sandbox Update - Creation Setup

Backup and restore in progress
Please wait...

SedonaOffice

This may take a while depending on the size of your source database...

Removing temp files

Progress bar: [80% complete]

Cancel

Wait for the wizard to complete.



Select **Finish**.

Test the sandbox by logging into it now.

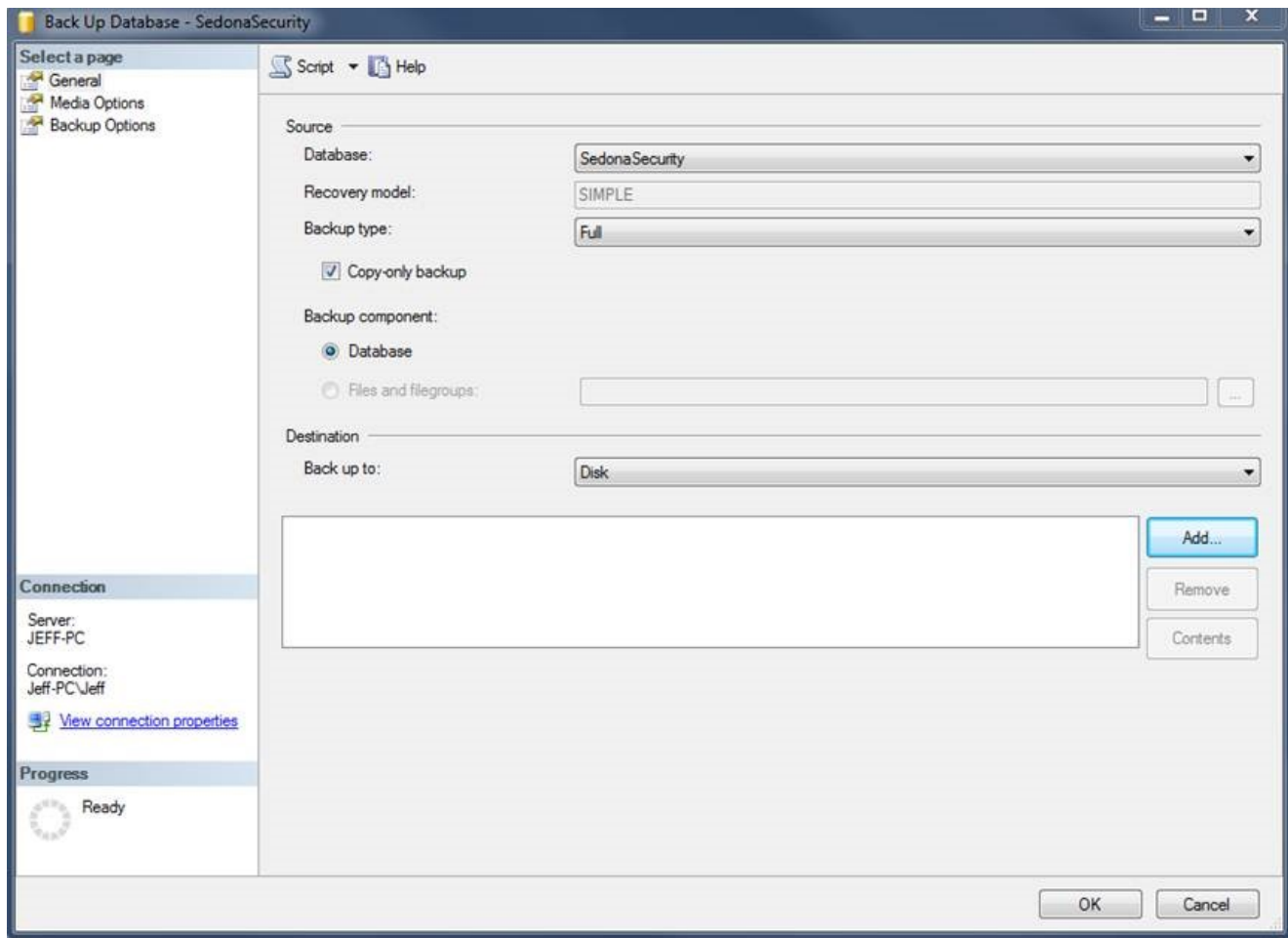
To create the backup through SQL Management Studio:

Enter SQL Management Studio on your SQL Server

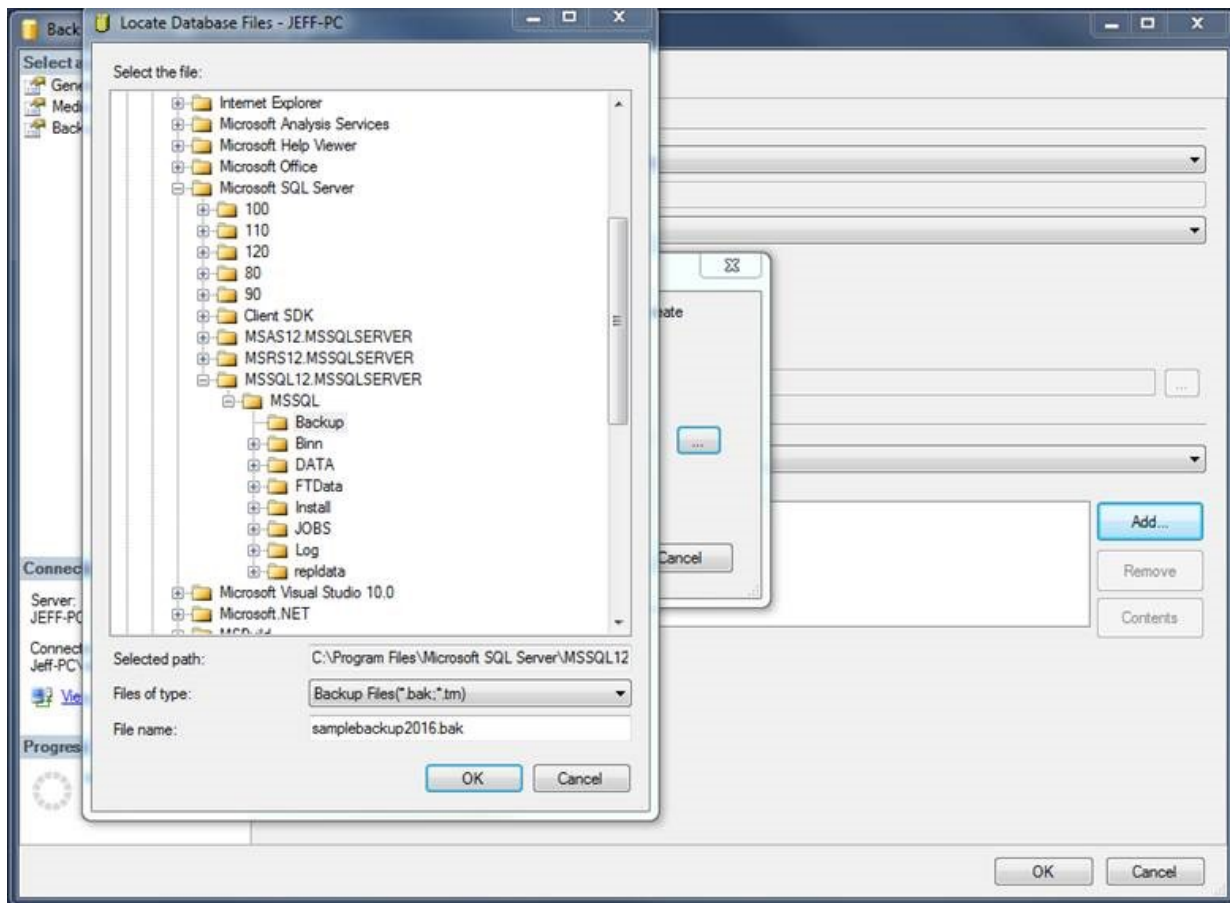
Expand Databases

Right-click the database you're creating your backup from. Typically this is your active, or final, database. Go to Tasks>Back Up...

Make sure the Backup type is Full, the Copy-Only backup is checked, and the Destination field is clear:



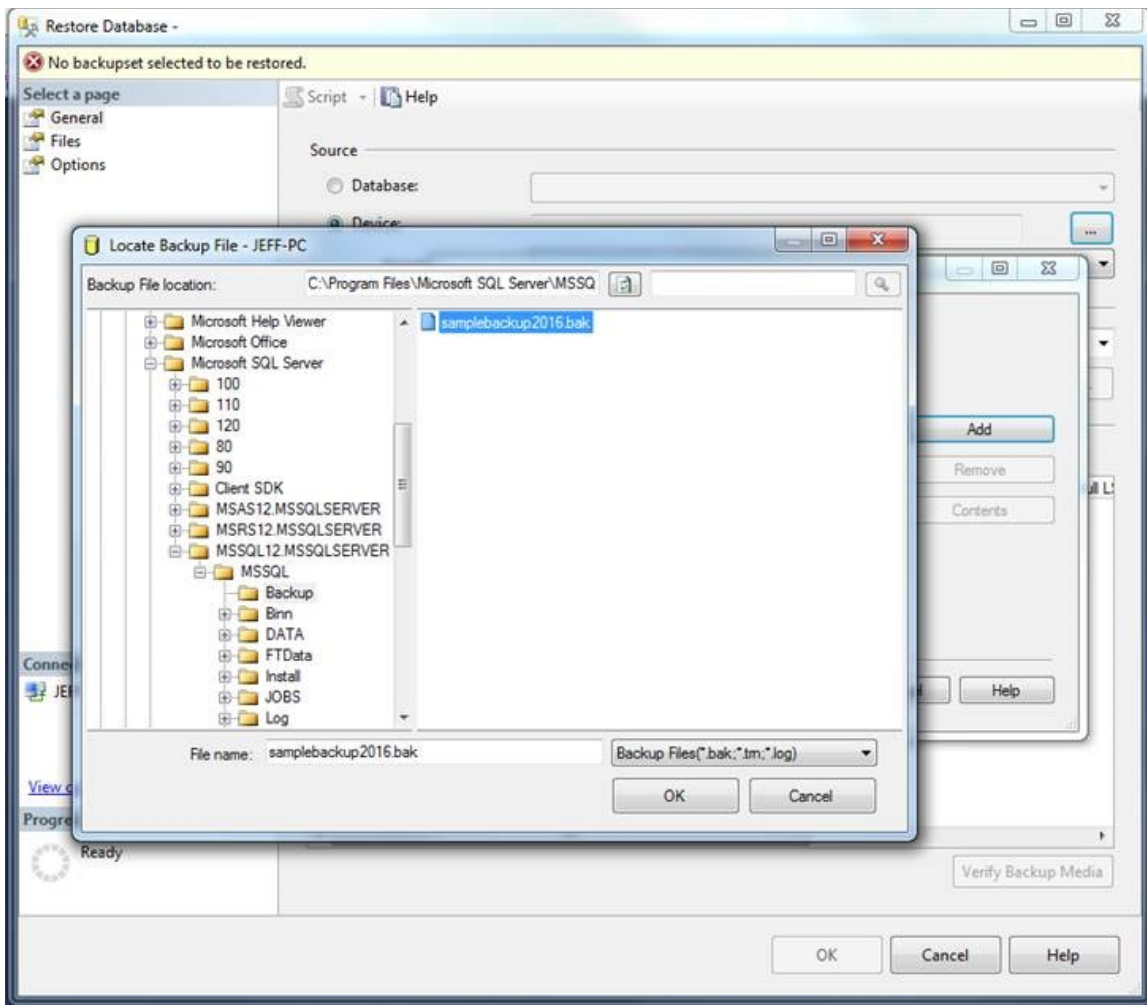
Click Add under Destination, Browse via clicking the “...” Button next to File Name, and name your backup including adding the .bak file extension:



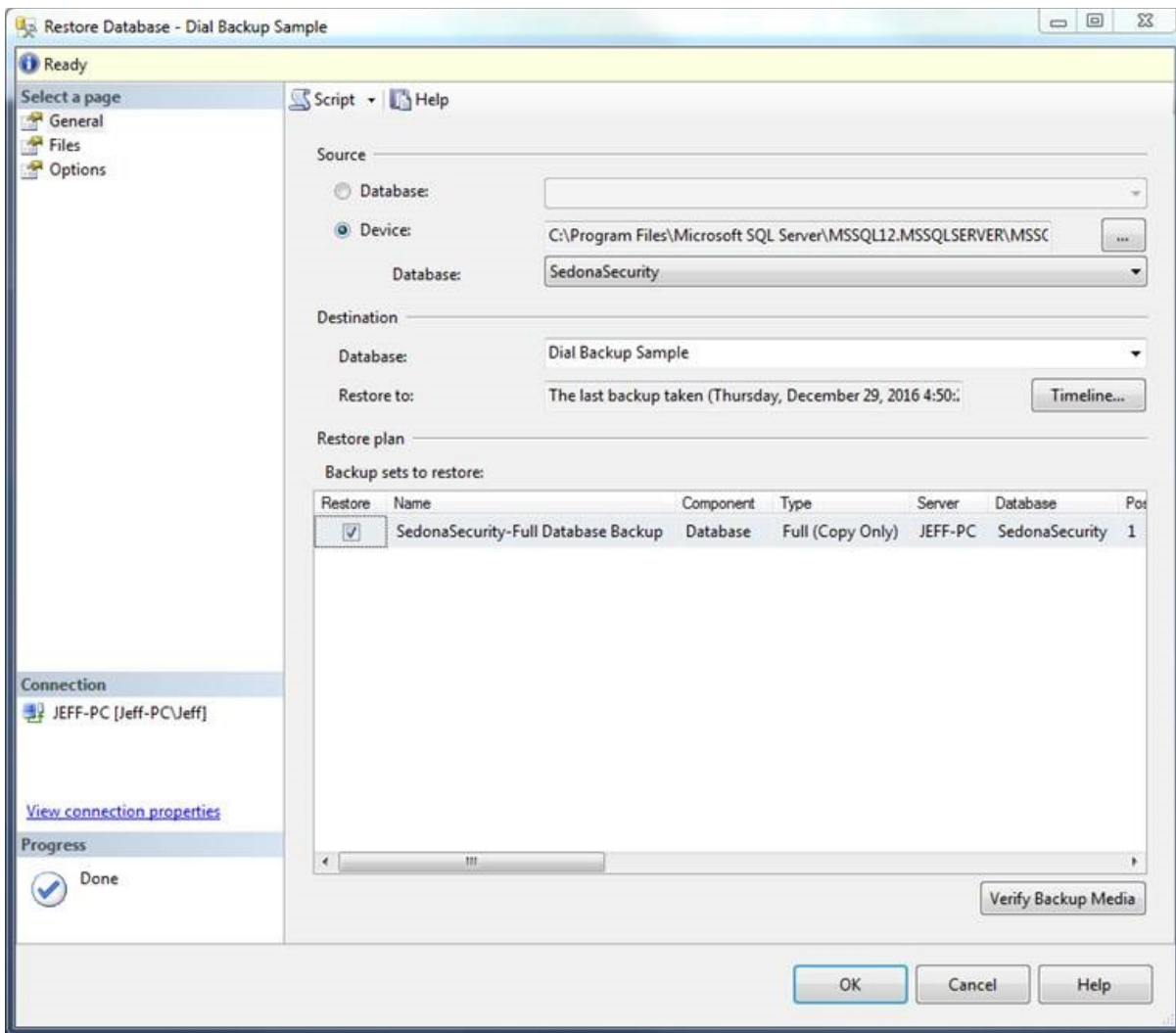
Click OK on each of the three windows to start the backup. Once you get the message that the Backup has been completed successfully, click OK.

Once you have your backup completed, right-click on Databases>Restore Database...

Select the Device radio button, hit the ... Button, then the Add button, and locate the backup file you just created:



Select the backup and click OK twice to get back to the Restore Database Window. Rename the Destination Database to the name of the yearly backup (e.g. Yourcompany 2016) and make sure the Backup set is checked:



In most cases, you'll be good to click OK and run the restore which will create the backup database on the SQL server. If the database name already exists, be sure to check to Overwrite the existing database (WITH REPLACE) on the options page. It's good to double-check that the files (either on the File page or the Options page) are named after the backup's name and not the original database you're backing up from.

Once you've created the backup database, the last thing you need to do to get it to display in SedonaOffice is edit the SedonaMaster database's Company table and add a row for the new Database. Everything except the Company Name and DataSource can be copied from the original database. Company Name is what it will display as in the SedonaOffice drop-down menu on login. DataSource is the backup database you just created:

	Company_id	CompanyName	Address	Phone1	Phone2	Federalid	ConnectionStr...	ComputerName	DataSource	Userid	Password	Address1	Address2	Document_Ser...	Sedona_id
	6	Master Setup St...	999 Maple St	9994441111			Provider=SQLD...	DESKTOP-NASS...	MasterSetupSta...	SedonaReports			Northville, MI 4...	DESKTOP-NASS...	0
	7	Sedona Security	999 Maple St	9994441111			Provider=SQLD...	DESKTOP-NASS...	SedonaSecurity	SedonaReports			Northville, MI 4...	DESKTOP-NASS...	0
*	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL

Typically, if you've created the backup of the correct database, users should have the same permissions in SedonaOffice to the backup and it should appear in the drop-down menu. If for some reason it does not, use the Administrator account for SedonaOffice, go to the SedonaSetup module>Users and add them to the appropriate group for access permissions.