# How to Backup and Restore a Database

EDM provides built-in tools for backing up and restoring the databases that store test configuration data. Regular backups protect against data loss and make it easy to migrate configurations between machines. This article covers accessing the backup/restore tools, understanding the database types involved, and performing common operations.

## Database Types

EDM supports two database systems for storing test configurations:

- **SQLite** – installed automatically with EDM and used as the default database. Requires no authentication, only a file path to the database file.
- **Microsoft SQL Server** – optional, and recommended to be installed via the EDM installer, which automatically creates a SQL Server instance. Supports SQL Server 2008 R2, 2014, 2017, and 2019. Requires either Windows Authentication or a username/password set up during SQL Server installation.

## Accessing Backup and Restore

1. Open the **Tools** menu.
2. Select **Backup and Restore Database(s)**.

This opens the **Database Management** window, which is organized into two tabs.

## Database Management Tabs

### 1. Operation on Database

Use this tab for single-database actions:

- **Back Up** – creates a backup of the current database.
- **Restore** – restores the database from an existing backup file.
- **Delete** – removes unwanted backup files.
- **Auto Backup** – schedules automatic backups so the database is backed up without manual intervention.

You can also: - Choose whether to back up the database **in its entirety** (tests and data) or **just the tests** (excluding data). - Specify a **date range** for data file backups.

### 2. Batch Operations

Use this tab to run backup/restore operations on multiple databases at once — useful for large-scale data management.

## Backup File Formats

| Extension | Description |
|---|---|
| `.sdbk` | SQL database backup — one or more databases and all associated data |
| `.sbk` | SQL database backup — a single database and its data |
| `.ssdbk` | SQL Server database backup — one or more databases and all their data |
| `.ssbk` | SQL Server database backup — a single database and its data |

**Important compatibility note:** `.sbk` files can be imported into SQL databases, but `.ssbk` files **cannot** be imported into SQL databases. The `.sbk` and `.ssbk` formats are created using specific commands within the backup dialog box.

## Backing Up a Database

1. Go to **Tools > Backup and Restore Database(s)**.
2. On the **Operation on Database** tab, select the database to back up.
3. Click **Back Up**.
4. Choose whether to back up the full database (tests + data) or just the tests, and set a date range if backing up data files.
5. Choose a backup file format and destination, then confirm.

## Restoring a Database

1. Go to **Tools > Backup and Restore Database(s)**.
2. On the **Operation on Database** tab, click **Restore**.
3. Select the backup file to restore from.
    - Confirm the file format is compatible (see the compatibility note above — `.ssbk` files cannot be restored into a SQL database).
4. Confirm the restore to load the backed-up data into EDM.

## Accessing SQL Server Remotely

If your database is hosted on a separate machine, both the server and client must be configured for remote access:

**Server Configuration:** 1. Open **Computer Management > Services and Applications > SQL Server Configuration Manager > SQL Server Network Configuration**. 2. Open **Protocols** properties and ensure **TCP/IP** is enabled with the TCP Port set to **1433**. 3. Under **SQL Server Services**, confirm the SQL Server instance and SQL Server Browser are running (start them if not).

**Client Configuration:** 1. In EDM, go to **Tools > Access Database** (the Database Connection Wizard). 2. Enter the server's IP address followed by the instance name, in the format `IP Address/Instance Name`. If no instance name is given, EDM defaults to `appdataserver14`. 3. If you encounter a connection error, try **Server Authentication** instead of **Windows Authentication** — some Windows security policies restrict Windows Authentication for this scenario. 4. If needed, reset the password for the `sa` account using Microsoft SQL Server Management Studio on the server PC.

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