

## Test system Build Diary

### **Migration from V6 patch 40 to 2022 R3 (V12 patch 31)**

## Disclaimer

This document is provided "as is" and is for your guidance and educational purposes only. It does not replace the Online documentation, nor is any warranty expressed nor implied for the steps described herein.

## Document Information

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## Introduction

### What is a "Build Diary"

A Build Diary simply describes the steps taken by Sage Support to perform a task or tasks on our internal test systems. Build diaries could be created for major multi-node installations, but may also just be describing the steps taken when installing a small hotfix, or anything in-between.

### Why is this being shared

It may be useful for you to see the steps we have taken to create or implement some feature or installation, as this may highlight "gotcha's", issues encountered or just give you some guidance if you are planning something similar yourself.

You could potentially use these documents as the base for your own "Workplan document" (Described in "Overview of patching X3 and supporting technologies"

<https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk-support-insights/posts/sage-x3-technical-support-tips-and-tricks---march-2021-index> ) when you are planning your own activities

### Target Audience

This document is aimed at Sage X3 Certified Technical consultants. Sage prescribe that X3 system installation, maintenance, migrations, etc. should be performed by suitably qualified Sage X3 consultants. The prerequisite consideration would be for them to have the latest "Sage X3 Certified Technical Consultant" certification. You can read more about the Sage X3 qualifications and requirements in Sage University ( <https://sageu.csod.com/catalog/CustomPage.aspx?id=20000242#tc> )

### Additional things to note

- This document does NOT purport to illustrate "best practice" for the task being described
- The steps described will not necessarily be for a "perfect" task, as there may have been issues that needed to be overcome, worked around, or ignored
- The Sage internal test system has network and hardware configuration specific to Sage
- The Sage internal test system does not necessarily include a Windows Domain and has Sage sandbox specific Windows security setup, so operating system permissions are generally not discussed
- If you intend to use these notes as a guide for your own activities, use with caution and perform your own testing to ensure the described steps are suitable and identify any additional considerations that apply to your own situation
- Ensure you only install and use software you are licensed for

### What does this Build Diary describe?

This build diary primarily describes migrating a V6 Patch 40 instance to Version 12 patch 31 (2022 R3)

## 2022 R3 – Migration from V6 build diary

### Objective

I want to migrate my V6 patch 40 system to Version 12 patch 31 (2022 R3)

### Starting architecture and notes

Single node V6 server with one folder (DEMO)

Single node V12 server, already installed with Version 12 patch 31

Software already loaded:

Windows Server 2019

OpenJDK 1.8.0\_282

Edge, Firefox and Chrome browsers

7-Zip 19.00

Sage X3 2022 R3

All X3 components

Microsoft SQL Server

Windows users setup (Local users)

“x3admin” for installation and management

“X3run” for service runtime

### Summary of the overall process

- Checks and procedures for the existing V6 (source) instance
- Install new Sage X3 V12 solution (target instance)
- Extract the data from the source instance
- Copy the source folders/data to the target instance
- Validate folder in the target instance
- Perform post migration steps

Dealing with migration of customisations is beyond the scope of this document.

## Migration vs Upgrade

The Sage documentation used to differentiate between a Migration and an Upgrade. I still tend to follow the old terminology as it was clearer to me at least. I call it “migration” when migrating data from one instance to a different instance. “Upgrade” is the process by which you perform an “in place” update of the data overwriting the existing instance.

i.e.

- If you MIGRATE, you end up with 2 copies of the same data – one version untouched and the second version is the updated data.
- If you UPGRADE, you have 1 copy of the data, the original version has been overwritten by the upgrade process.

In the current Sage documentation we call these two processes:

- EASY UPGRADE: in place upgrade, documented at [http://online-help.sageerpx3.com/erp/12/public/getting-started\\_quick-upgrade-guide.html](http://online-help.sageerpx3.com/erp/12/public/getting-started_quick-upgrade-guide.html)
- FOLDER UPGRADE IN VERSION 12: where the earlier version folder data is transferred to a separate V12 instance, documented in [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_upgrade-folder-version-12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_upgrade-folder-version-12.html)

These notes are only discussing the MIGRATION option (aka FOLDER UPGRADE IN VERSION 12)

## Documentation to use for planning and execution of this task

[Sage Online documentation](#)

Navigate to the public help page <https://online-help.sageerpx3.com/erp/12/public/index.html>

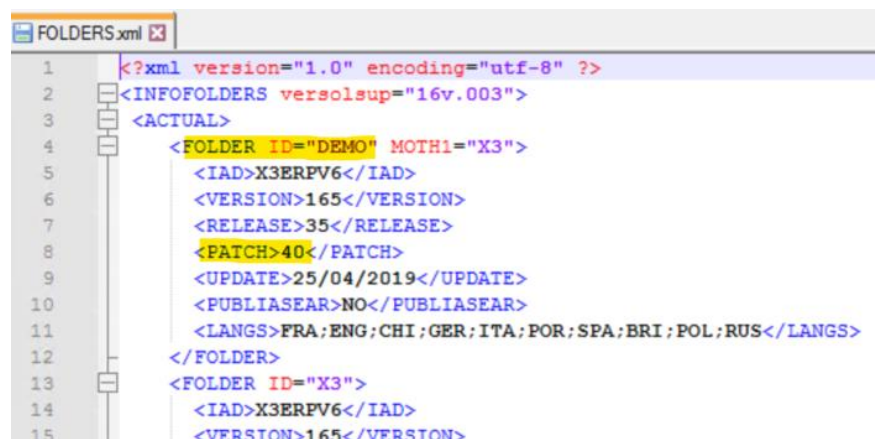
Look for the "Upgrade" section which has links to both "Easy upgrade guide" and "Folder upgrade in Version 12" Pick the " Folder upgrade in Version 12" which leads you to [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_upgrade-folder-version-12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_upgrade-folder-version-12.html)

## Migration steps

### Check Source installation version

Confirm the source instance is on the minimum required patch level, for version 6 the minimum is patch 29. This is documented in [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_upgrade-of-a-folder\\_v11&v12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_upgrade-of-a-folder_v11&v12.html)

You can review the folders.xml file located, for example, in D:\SAGE\SAGEX3V6\X3V6\Folders



```

1  <?xml version="1.0" encoding="utf-8" ?>
2  <INFOFOLDERS versolsup="16v.003">
3  <ACTUAL>
4    <FOLDER ID="DEMO" MOTH1="X3">
5      <IAD>X3ERPv6</IAD>
6      <VERSION>165</VERSION>
7      <RELEASE>35</RELEASE>
8      <PATCH>40</PATCH>
9      <UPDATE>25/04/2019</UPDATE>
10     <PUBLIASEAR>NO</PUBLIASEAR>
11     <LANGS>FRA;ENG;CHI;GER;ITA;POR;SPA;BRI;POL;RUS</LANGS>
12   </FOLDER>
13   <FOLDER ID="X3">
14     <IAD>X3ERPv6</IAD>
15     <VERSION>165</VERSION>
  
```

## Run the pre-migration tasks on Source installation (V6)

1. Check the function prerequisites [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_requisites-for-upgrade-of-a-folder-v11&12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_requisites-for-upgrade-of-a-folder-v11&12.html)

- a. Run consistency verification

Development, Utilities, Verifications, Data, Consistencies

<https://online-help.sageerpx3.com/erp/12/staticpost/consistency-verification/>

This is likely to take considerable time to complete!

- b. Purge any data that is not needed in the target system

This step is optional, but is generally strongly recommended and best practice. Archive and/or purge any data that can be. This will minimise the amount of data that needs to be carried across to the new instance, reducing CPU, Memory and disk requirements. This includes cleaning up any folder directories such as tmp, TRA and running the script TRTMIGDEL.

You can review the blog article “Time to tidy up?” ( <https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk-support-insights/posts/time-to-tidy-up> ) for further discussions around archive and purge.

The following tables can be truncated in the source folder, prior to the copy in the new solution (some may not exist, it all depends on the source version).

**Caution: Do not purge these tables on the live folder until the live migration itself. To test the process, proceed from a copy of the live folder**

Table	Description
AREPORTM	Reports temporary work
ATMPTRA	Trace temporary
ALISTER	Requester results
APLLCK	Logical locks table
AESPION	Tables maintenance audit table (this may be discussed)
AWRKLOG	Workflow processes log
AWRKLOGIND	Workflow processes indexes
AWRKLOGMES	Workflow processes messages
BALANCE	General accounting balance
BALANA	Analytical balance
FUP	Reminders
FUPTOT	Reminders - Totals
LABELPRN	Label Printing
PRTSCRWRK	Work table for screen hardcopies
GLCONSO	Consolidation Ledger
BALCONSO	Consolidation Trial Balance
GAJOSTA	Journals – Reports per period
BATCH	Batch Job Parameters
TMPEXPENSE	Temporary Table Expenses
STAT	Statistics

2. Run the Control procedures for each folder to be migrated

The documentation is not explicit, but you will use the migration scripts that come with the SOURCE server, located in the X3 folder.



The list of scripts is available at [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_list-of-X3-upgrade-procedures-by-module-v12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_list-of-X3-upgrade-procedures-by-module-v12.html)

## List of control procedures before X3 migration

These procedures must be launched on the folder that will have to be migrated before the data extraction.

These procedures can be launched in batch execution.

Module	Procedure	Description
Financials	UUMGCTLCPT00	Entries
A/P-A/R accounting	UUMGCTLTRS00	BP invoices
Sales	UUMGCTLSAL01	Quotation
	UUMGCTLSAL02	Orders
	UUMGCTLSAL06	Deliveries
	UUMGCTLSAL07	Returns
	UUMGCTLSAL08	Invoices
Purchasing	UUMGCTLPUR01	Purchase requests
	UUMGCTLPUR02	Normal orders
	UUMGCTLPUR03	Open orders
	UUMGCTLPUR06	Receipts
	UUMGCTLPUR07	Returns
	UUMGCTLPUR08	Invoices

To run all these control scripts in one go, use the script file UUMGCTLX3 from the X3 folder, then select the appropriate child folder to run the scripts against

Development, Utilities, Miscellaneous, Run processes

Any errors reported should be resolved before proceeding. The log file for this run is in the X3 folder/TRA directory, for example D:\SAGE\SAGEX3V6\X3V6\Folders\X3\TRA

### 3. (Optional) Run the pre-migration scripts

These scripts will update tables used in the migration process, but are only adding NEW data in NEW columns, so will be ignored by V6. This means these scripts can be run anytime, but bear in mind this process will take system resources and lock tables for a period of time, so may wish to run them outside normal user working hours.

These scripts will be run as part of the migration, if they are not done beforehand. i.e. running these pre-migration scripts should reduce the LIVE migration time to complete. You should verify the exact timings by your own testing.

The list of scripts is available at [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_list-of-X3-upgrade-procedures-by-module-v12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_list-of-X3-upgrade-procedures-by-module-v12.html)

To run all the pre-migration scripts, use the script file UUMGPRESX3 from the X3 folder

Development, Utilities, Miscellaneous, Run processes

## List of pre-upgrade procedures

These procedures must be launched from the folder that has to be upgraded before the data extraction. They can be launched in batch execution.

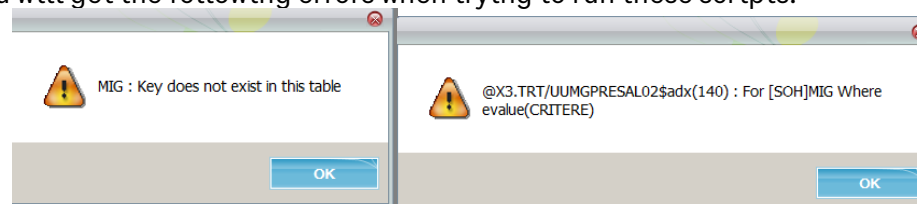
Module	Procedure	Description
Common data	UUMGPRETREC04	Pre-loading of fields
		GACCDUATE table: BPAPAY
	UUMGPRETREC07	Pre-loading of fields
		BPCUSTOMER table: BPAPYR, BPCRSK, CUR, NTNAM, BPAADD, DAYMON, UVYCOD2
	UUMGPRETREC08	Pre-loading of fields
		BPSUPPLIER table: BPAPAY, BPAINV, BPSRSK, CUR, CNTNAM, BPAADD
Sales	UUMGPRESAL01	Pre-loading of fields
		SQUOTE table: BPAORD, BPIEENUM, EECICT, EECLOC
		SQUOTED table: PJT
	UUMGPRESAL02	Pre-loading of fields
		SORDER table: BPAORD, BPAPYR, BPAINV, EECICT, EECLOC
		SORDERQ table: PJT
	UUMGPRESAL03	Pre-loading of fields
		SORDERC table: BPIEENUM, EECICT, EECLOC
	UUMGPRESAL04	Pre-loading of fields
		VSORDER table: BPAORD, BPAINV, EECICT, EECLOC
	UUMGPRESAL05	Pre-loading of fields
		VSORDERC table: BPIEENUM, EECICT, EECLOC
	UUMGPRESAL06	Pre-loading of fields
		SDELIVERY table: BPAINV
		SDELIVERYD table: PJT
	UUMGPRESAL07	Pre-loading of fields
		SRETURN table: BPIEENUM, EECICT, EECLOC
		SRETURN table: PJT
	UUMGPRESAL08	Pre-loading of fields

(Partial list)

NOTE: to run the UUMGPRESAL02–UUMGPRESAL05 scripts successfully you must:

- Update the MIG activity code for the SOURCE folder
  - Development, Data and Parameters, Development Setup, Activity codes
    - Query back MIG and check the "Active" box, then save the change
  - Development, Utilities, Dictionary, Validations, Dictionary
    - Select "Complete" and "MIG" activity code then OK

Otherwise, you will get the following errors when trying to run these scripts:

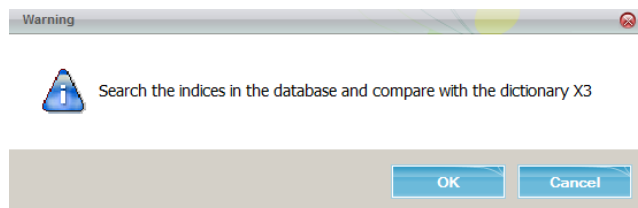


The log file for this run is located in the X3 folder/TRA directory, for example  
D:\SAGE\SAGEX3V6\X3V6\Folders\X3\TRA

4. (Optional) Run check report on the tables to identify missing indexes (SQLDICO)

<https://online-help.sageerpx3.com/erp/12/staticpost/identify-missing-indexes/>

Development, Utilities, Verifications, Database, Search index



The log file for this run is located in the X3 folder/TRA directory, for example  
D:\SAGE\SAGEX3V6\X3V6\Folders\X3\TRA

5. Check for any previous migration files

It is mandatory to ensure that any 'migration tables' from previous migrations have been removed, by running the script file TRTMIGDEL. To see if you need to run this script, you can check for U\* tables using the following SQL script:

```
SELECT s.name, t.name, t.create_date, t.modify_date
FROM sys.tables t
INNER JOIN sys.schemas s
    on t.schema_id = s.schema_id
WHERE t.name like 'U%' and t.name not in
('UNFILWRK', 'UNITOFTIME', 'UNPAID', 'UPORDER', 'UPORDERC', 'UPORDERP', 'UPORDERQ', 'USERGUIDES')
ORDER BY s.name, t.name;
```

There are some tables beginning with U that do not relate to migration, which the above script tries to take account of!

6. Ensure there are no journal or matching on hold at the time of the migration

Tables MTCBATCH (matchings) and GACCTMP, GACCTMPD, GACCTMPA (journals) must be empty before extracting the folder, the migration won't start otherwise.

## Create target installation (V12)

Perform fresh installation of V12 instance, ready to receive the old version data. This activity will include any patching needed to get the target instance to the required version.

This activity is covered in other build diaries, so this document will assume you already have such an instance prepared.

Extract the transactional data into SVG on the source instance

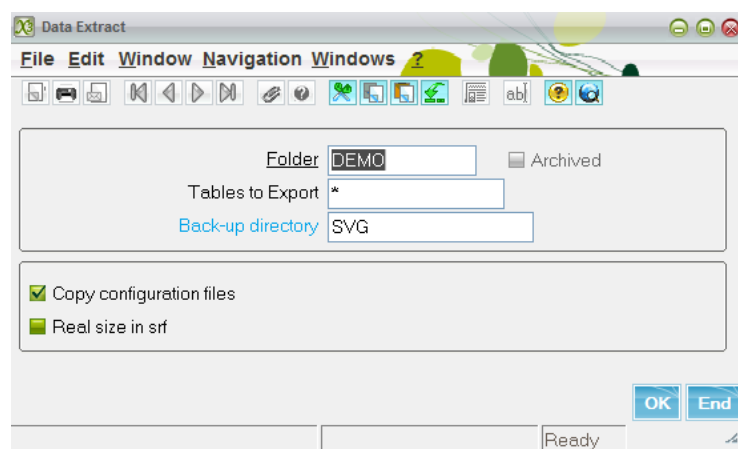
Perform these steps on the Source installation (V6)

Extract the folder data

Use “Data Extract” (DOSEXTRA) to export the source folder data to flat files.

Development, Utilities, Extraction/Integration, Data extract

**NOTE: This task will take some time to complete**



**IMPORTANT : this process does not check for table consistency so should only be run on a system with no users or background processes doing any processing. You may wish to enable single user mode to ensure only the ADMIN user can login for this part of the process**

Once the SVG has completed, you need to then package up the directories “folders\MY\_FOLDER” and “folders\X3\_PUB\MY\_FOLDER” for transfer to the target instance

For example, you could use ZIP to package up these files

```
cd /d D:\SAGE\SAGEX3V6\X3V6\Folders
"C:\Program Files\7-Zip\7z" a DEMO_mig.zip DEMO X3_PUB\DEMO
```

The log file for the extract is located in the folder TRA directory, for example D:\SAGE\SAGEX3V6\X3V6\Folders\DEMO\TRA

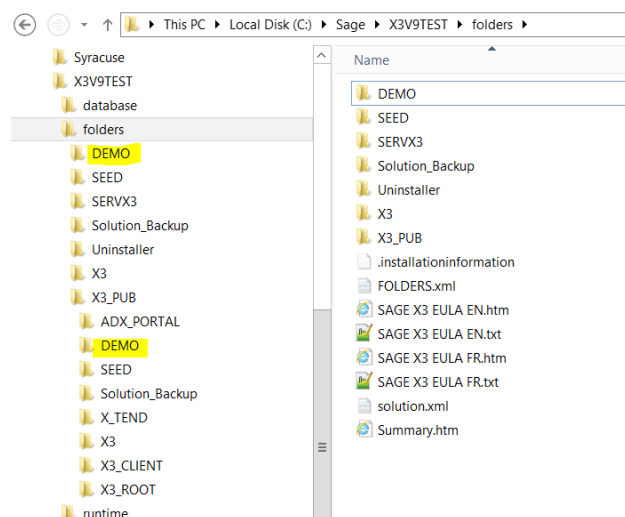
Copy the source folders/data to the new target instance

Perform these steps on the Target instance (V12)

Copy the ZIP file from source to destination server

Extract the folder files

Extract the ZIP file into your destination servers “folders” directory and rename the folder if you want. It will be difficult to rename the folder at a later date, so now is the time to do it



Check for adxodbc file in the folder directory you just copied and REMOVE it if it exists (it may not exist)

**WARNING: If an existing adxodbc file is left in place, you may find you are accessing the SOURCE database tables!!**

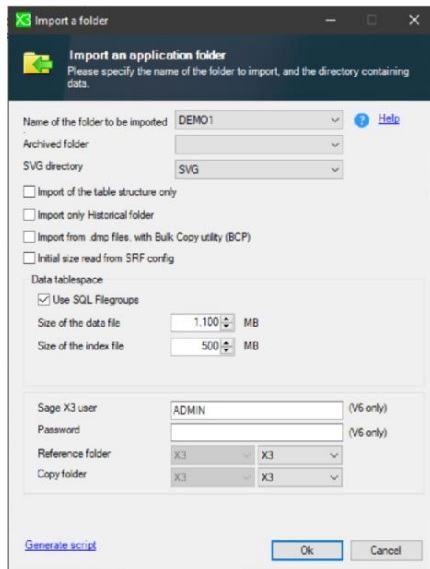
Import the folder data

Use the Sage X3 Console

**NOTE: this may take some time to complete**

Load the solution

Navigate to Folders, Import



**Import a folder**

Import an application folder  
Please specify the name of the folder to import, and the directory containing data.

Name of the folder to be imported: DEMO1 [Help](#)

Archived folder:

SVG directory: SVG

☐ Import of the table structure only

☐ Import only Historical folder

☐ Import from .dmp files, with Bulk Copy utility (BCP)

☐ Initial size read from SRF config

Data tablespace

☒ Use SQL Filegroups

Size of the data file: 1,100 MB

Size of the index file: 500 MB

Sage X3 user: ADMIN (V6 only)

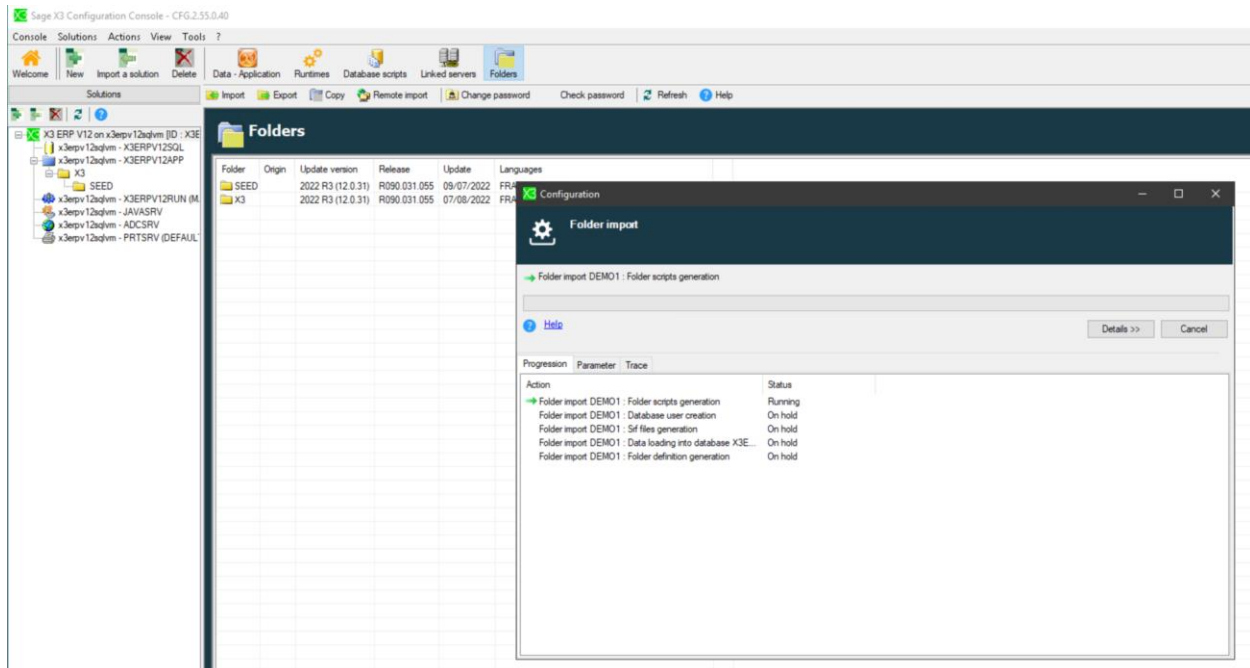
Password:  (V6 only)

Reference folder: X3

Copy folder: X3

[Generate script](#)

Click OK



Sage X3 Configuration Console - CFG.2.55.0.40

Console Solutions Actions View Tools ?

Welcome New Import a solution Delete

Solutions Data - Application Runtimes Database scripts Linked servers Folders

Import Export Copy Remote import Change password Check password Refresh Help

**Folders**

Folder	Origin	Update version	Release	Update	Languages
SEED		2022 R3 (12.0.31)	R090.031.055	09/07/2022	FR
X3		2022 R3 (12.0.31)	R090.031.055	07/08/2022	FR

**Configuration**

Folder import DEMO1: Folder scripts generation

[Help](#) [Details >>](#)

Progression Parameter Trace

Action	Status
Folder import DEMO1: Folder scripts generation	Running
Folder import DEMO1: Database user creation	On hold
Folder import DEMO1: Srf files generation	On hold
Folder import DEMO1: Data loading into database X3E...	On hold
Folder import DEMO1: Folder definition generation	On hold

You should check the “trace” tab for any errors reported.

Once successfully completed, you can view the trace file from within the console, using the “trace” tab. For me, the DEMO folder took about 24 minutes.

This information is also contained in the X3 Console Log file, located in C:\Users\<Your UserName>\AppData\Roaming\Sage\Console\traces\gtrace.tra

Notice at this stage that the folder version is still the original version (so is not yet useable)



Folders					
WARNING: Folder SEED version (90.31.55) <- DEMO1 version (35.0)					
Folder	Origin	Update version	Release	Update	Languages
DEMO1		2022 R3 (12.0.31)	35	25/04/2019	FRA;ENG;CHI;GER;ITA;POR;SPA;BRI;POL;RUS
SEED		2022 R3 (12.0.31)	R090.031.055	09/07/2022	FRA;ENG;ITA;POR;SPA;BRI;GER;POL;CHI;ARB;AUS
X3		2022 R3 (12.0.31)	R090.031.055	07/08/2022	FRA;ENG;BRI;CHI;GER;ITA;POL;POR;SPA;ARB

## Folder validation and migration

Login to X3 as an ADMIN user and connect to the X3 folder

1. Make sure the batch server is running and check number of jobs that can run

Navigate to Administration, Administration, Endpoints, Batch Server

X3 batch controllers										
Code	Auto start	Status	X3 solution	Administrative endpoint	User	Role	Locale preference	Time between two searches (sec)	Timeout search time (sec)	Maximum delay to launch a query (minutes)
X3ERP12	<input checked="" type="checkbox"/>	Running	X3ERP12	X3ERP12 / X3	admin	Super administrator	English (United States)	30	30	0

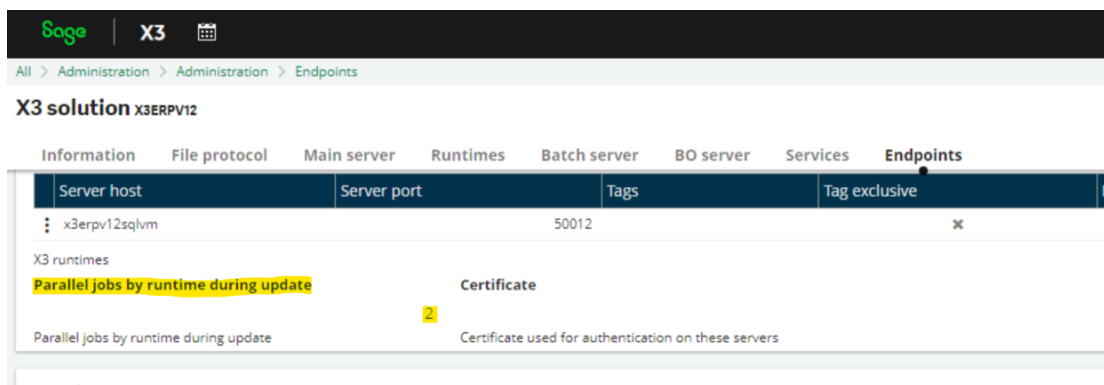
View the detail to confirm “Maximum active queries” and set appropriately

Sage   X3			Super administrator	Super administrator	X3ERP12 / X3	?	☆	?
All > Administration > Administration > Endpoints								
X3 batch controllers								
<div>Information</div> <div>Context</div> <div>Configuration</div> <div>Runtimes</div>								
<div>Information</div> <div>Code</div> <div>X3ERP12</div> <div>Batch controller code is identical to X3 solution code</div> <div>Auto start</div> <div><input checked="" type="checkbox"/></div> <div>Defines if the batch co...</div> <div>Status</div> <div>Running</div>								
<div>Context</div> <div>X3 solution</div> <div>X3ERP12</div> <div>X3 solution and batch controller cannot be unlinked</div> <div>Administrative endpoint</div> <div>X3ERP12 / X3</div> <div>Endpoint corresponding to mother folder used for administrative tasks</div> <div>User</div> <div>admin</div> <div>User used for administrative tasks</div> <div>Super administrator</div> <div>Role</div> <div>Super administrator</div> <div>Role used for administrative tasks</div> <div>Locale preference</div> <div>English (United States)</div> <div>Language used for administrative tasks</div>								
<div>Configuration</div> <div>Time between two searches (sec)</div> <div>30</div> <div>Timeout search time (sec)</div> <div>30</div> <div>Maximum delay to launch a query (minutes)</div> <div>0</div> <div>Maximum active queries</div> <div>2</div> <div>Maximum number of queries launched on the runtime pool</div>								
<div>Runtimes</div> <div>X3 runtime tags</div> <div>Comma-separated tags can be used to select your preferred X...</div>								

My server has two Virtual Processors, so value of two is reasonable.

## 2. Check X3 solution setup

Navigate to Administration, Administration, Endpoints, X3 solution  
Check and edit if needed the “Parallel jobs by runtime during update”



I do not have any specific recommendations for this value to pass on, but my current rule of thumb is to set this value the same as the number of virtual processors.

## 3. Review folder settings

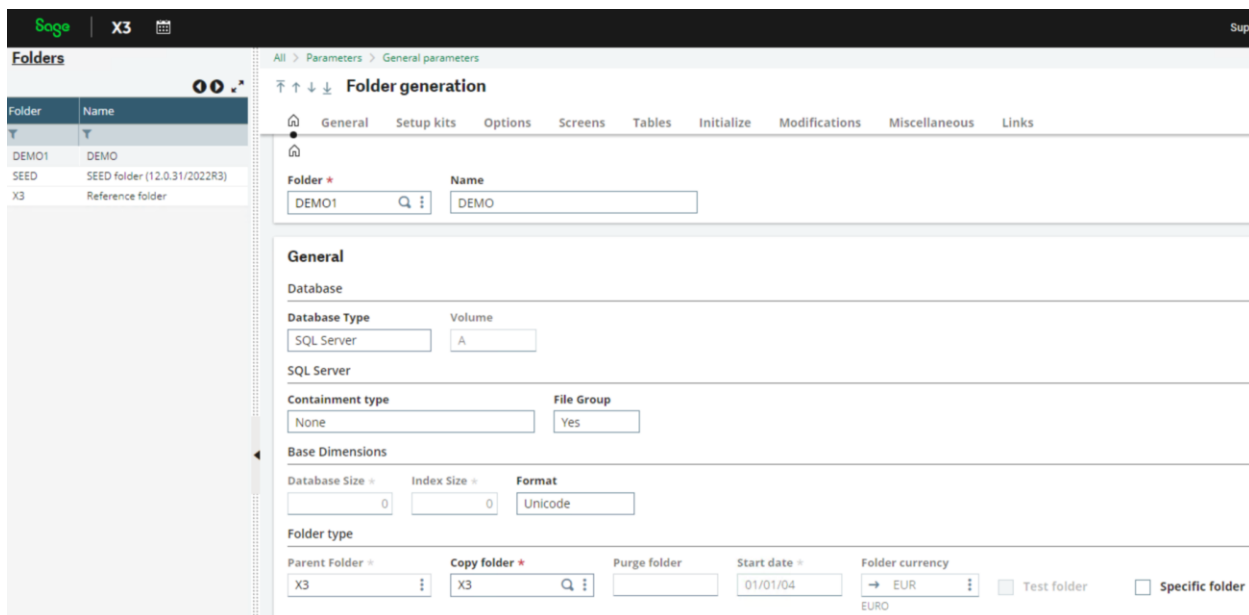
Navigate to Parameters, General Parameters, Folders

Select the imported folder and set “MIG” to a value of “Yes”

**If you only do one thing, do this!**

Make any other changes if needed, then Save the record

**NOTE: Even if no changes are required, it is mandatory to re-Save the folder record, so you **must** make at least one change in order to be able to save the record.**



All > Parameters > General parameters

Folder generation

General Setup kits Options Screens Tables Initialize Modifications Miscellaneous Links

Options

185 Results Display: 15

	Code	Description	Module	Active
1	ABI	Business Intelligence	Supervisor	Yes
2	ADS	National ID Code	Supervisor	No
3	APL	User portal	Supervisor	Yes
4	ARCH	Archiving	Supervisor	Yes
5	AUD	Standard audit	Supervisor	Yes
6	AZPL	ZPL printer	Supervisor	Yes
7	EORI	EORI identification	Supervisor	Yes
8	LEG	Multi-legislation management	Supervisor	Yes
9	MIG	Migrations	Supervisor	Yes
10	PAI	Time management fields / PAYE	Supervisor	No
11	PYS	Country formats	Supervisor	No

Save the record

#### 4. (Optional) Create Migration Plan

You can create a “Migration Plan” if you want, but is not necessary unless you want greater control over the process, for example to postpone some of the Post Migration jobs

If you do postpone some jobs, bear in mind the migration is not fully completed until all processes have completed successfully

#### 5. Launch folder validation

This point is a great place to take a full cold backup copy of your VM or instance, so you can revert to your backup and re-run this part as many times as needed.

This will take some time to complete, depending on hardware/architecture and data volumes

Navigate to Parameters, General Parameters, Folders

Query back the imported folder

Click “Validation” button

All > Parameters > General parameters

Folder generation

General Setup kits Options Screens Tables Initialize Modifications Miscellaneous Links

Folder: DEMO Name: DEMO

Validation

General

Database

Database Type: SQL Server Volume: A

SQL Server

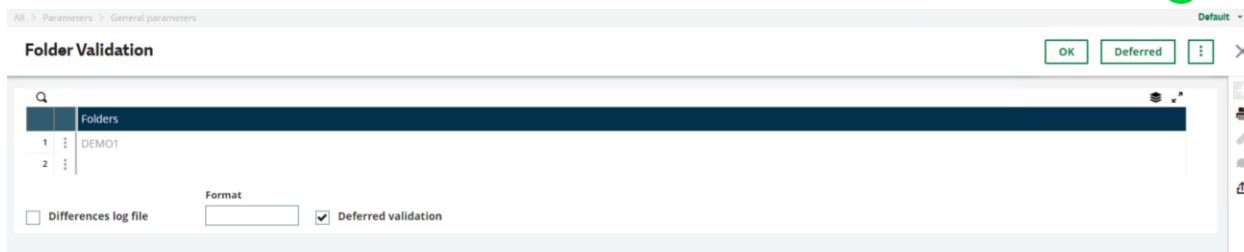
Containment type: None File Group: Yes

Base Dimensions

Database Size: 0 Index Size: 0 Format: Unicode

Can choose whether or not to de-select the “Deferred Validation” then click OK (or click “Deferred” if you want to defer the whole process to a later time/date)

It’s quicker to complete if you defer validation, but then the users then take the performance hit when they use the system interactively



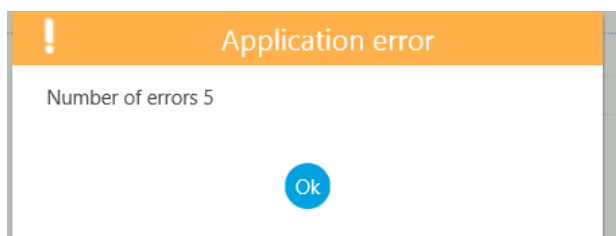
The normal folder validation will be performed, then (assuming MIG=Yes has been set!) the migration steps will be automatically launched.

Once the migration stage has been reached (it will take some time to reach this stage, around 3 hours for my DEMO folder), you can check progress on “Sequencing monitor” screen (Usage, Migrations, Sequencing monitor), or run the following SQL (see C:\InvestigationScripts\SQL\mzMigration.sql)

```
select PLAN_0, INTIT_0, STATUT_0, DATEL_0 "Launch Date", DOSSIER_0,
NOMTRACE_0, CREDATTIM_0, UPDDATTIM_0
From X3.AMOULIN1 head;
--
select line.PLAN_0, line.CODE_0, line.MODULE_0, line.RANGMOD_0 Step,
line.PHASE_0, line.RANG_0 Sequence, M.LANMES_0 Status, line.DATEL_0 "Launch
Date", line.HEUMAJ_0 "Update Time", tab.TABLEP_0 "Main Table", line.NBENREG_0
"No. records", line.NBENREGT_0 "No. Recs processed", line.FICTRA_0 "Log
File", line.CREDATTIM_0, line.UPDDATTIM_0
From X3.AMOULIN2 line, X3.AMOULIN tab, X3.APLSTD M
where line.CODE_0 = tab.CODE_0 and line.MODULE_0 = tab.MODULE_0 and
line.PHASE_0 = tab.PHASE_0 and line.RANG_0 = tab.RANG_0 and M.LANCHP_0 = 7944
and line.STATUT_0 = M.LANNUM_0 and M.LAN_0 = 'BRI'
order by line.PLAN_0, line.RANGMOD_0;
```

It took an additional 50 minutes to complete this migration plan section for my DEMO data.

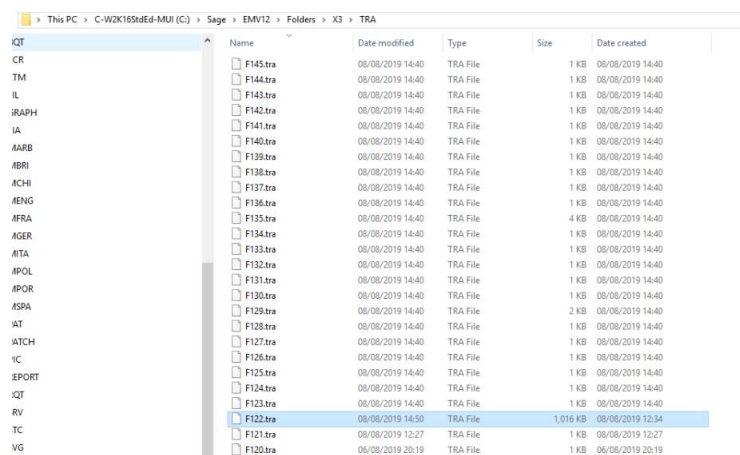
During the process you will see a log file, perhaps preceded by a popup indicating any errors or warnings:



Click OK, to then get the log file displayed

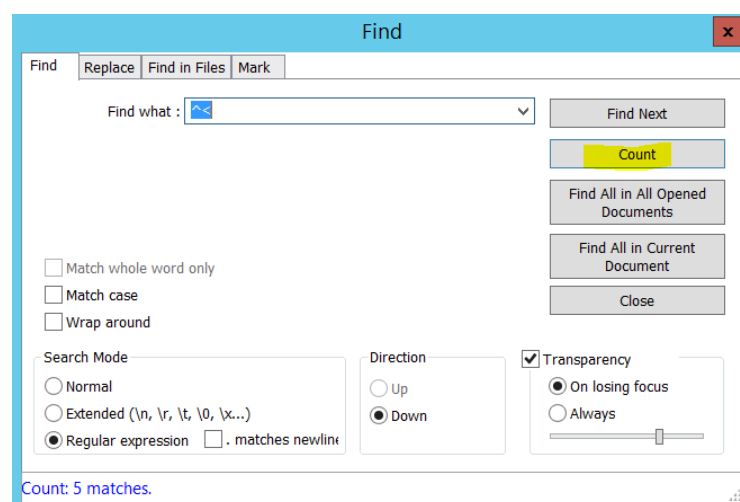
**IMPORTANT:** it is not obvious if the process has failed or not from the user interface, so you **MUST** check the end of the log file for the message “The procedures of migration plan MIG0619N01 were completed with the global status "Over"” and/or review the “Sequencing monitor” screen

We can grab the log file from C:\Sage\X3V9TEST\folders\X3\TRA



Name	Date modified	Type	Size	Date created
F145.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F144.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F143.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F142.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F141.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F140.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F139.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F138.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F137.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F136.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F135.tra	06/08/2019 14:40	TRA File	4 KB	06/08/2019 14:40
F134.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F133.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F132.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F131.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F130.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F129.tra	06/08/2019 14:40	TRA File	2 KB	06/08/2019 14:40
F128.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F127.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F126.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F125.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F124.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F123.tra	06/08/2019 14:40	TRA File	1 KB	06/08/2019 14:40
F122.tra	06/08/2019 14:50	TRA File	1,016 KB	06/08/2019 12:34
F121.tra	06/08/2019 12:27	TRA File	1 KB	06/08/2019 12:27
F120.tra	06/08/2019 20:19	TRA File	1 KB	06/08/2019 20:19

We can quickly find the errors in the log file by using Notepad++ and using a “Regular Expression” search “^<” You can do a search for any warnings/information messages with the search string “^>”



ALL reported “errors” must be resolved before Go-Live and all “warning/information” messages should be reviewed, understood and mitigated

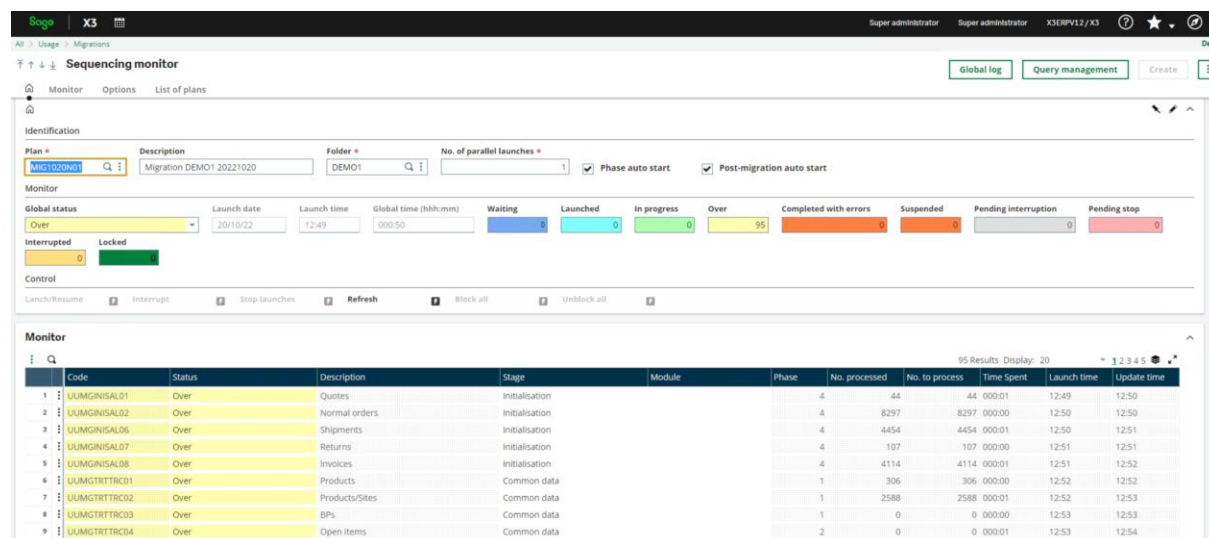
If the migration has failed, apart from the log files, don’t forget to also check:

- Windows Event Viewer
  - Run the script “..\InvestigationScripts\PowerShell\mzEventLogRun.cmd”
- SQL server log files
  - C:\Program Files\Microsoft SQL Server\MSSQL12.X3V9TEST\MSSQL\Log\ERRORLOG\*

## Perform any Post migration steps

1. Check migration monitor screen

### Usage, Migrations, Sequencing Monitor



Here we can see that “Over” (i.e. completed OK) are 95 and none are at another status (waiting, in progress, errors, etc) You can also run the SQL as before (mzMigration.sql) to see the same information.

**NOTE:** The "No.processed" and "No. to process" columns do not need to match up, as they are measuring different things, however the number of records in the U table and base table should be the same. For example, the PINVOICE or SINVOICE tables may show different values in these columns

2. Review log files

Review the overall Folder Validation log file.

You can review the individual process log files, which are located in the “..\\X3\\SRV\\TRA” subfolder (e.g. C:\\Sage\\EMV12\\Folders\\X3\\SRV\\TRA), although this information should already be in the main log file. The “serveur.tra” file should also be checked from this directory

3. Review the application settings of the folder in the target instance

Check “MIG” is now set to “No”

4. Execute any functional post migration steps

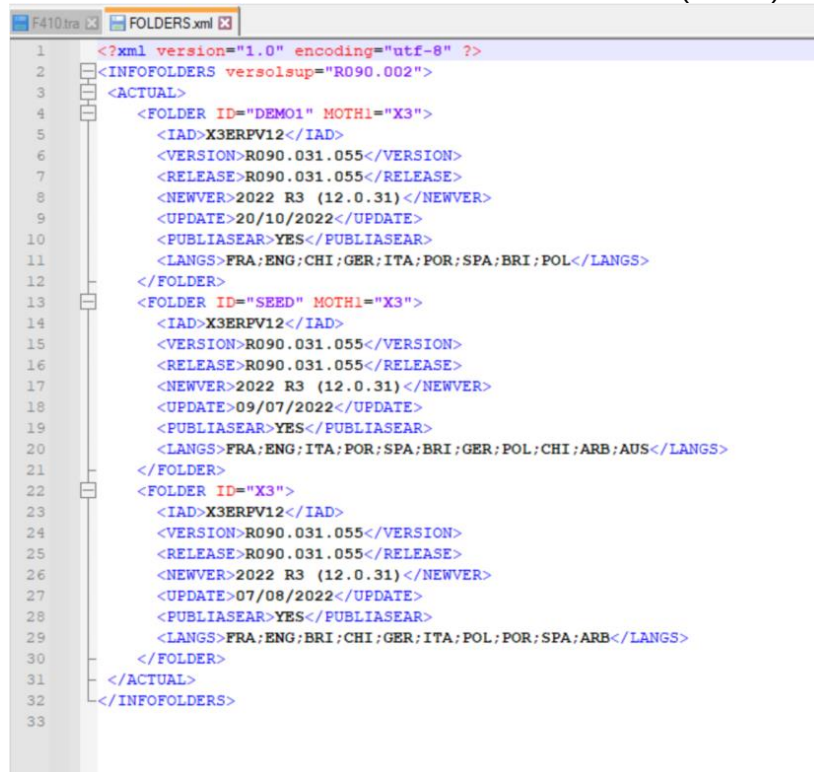
Refer to [https://online-help.sageerpx3.com/erp/12/public/getting-started\\_requisites-for-upgrade-of-a-folder-v11&12.html](https://online-help.sageerpx3.com/erp/12/public/getting-started_requisites-for-upgrade-of-a-folder-v11&12.html)

## 5. Decide when to drop the migration temporary tables

You may drop the temporary UU\* tables which have the MIG activity code by launching the TRTMIGDEL program from process execution function. There is no specified time for you to do this, so need to balance the possibility of reviewing the pre-migration data against disk space, backup time and risk of forgetting

## 6. Check the folders.xml file

You will see the version for DEMO1 shows as 2202 R3 (12.0.31) as expected



```

1  <?xml version="1.0" encoding="utf-8" ?>
2  <INFOFOLDERS versolsup="R090.002">
3    <ACTUAL>
4      <FOLDER ID="DEMO1" MOTH1="X3">
5        <IAD>X3ERFV12</IAD>
6        <VERSION>R090.031.055</VERSION>
7        <RELEASE>R090.031.055</RELEASE>
8        <NEWVER>2022 R3 (12.0.31)</NEWVER>
9        <UPDATE>20/10/2022</UPDATE>
10       <PUBLIASEAR>YES</PUBLIASEAR>
11       <LANGS>FRA;ENG;CHI;GER;ITA;POR;SPA;BRI;POL</LANGS>
12     </FOLDER>
13     <FOLDER ID="SEED" MOTH1="X3">
14       <IAD>X3ERFV12</IAD>
15       <VERSION>R090.031.055</VERSION>
16       <RELEASE>R090.031.055</RELEASE>
17       <NEWVER>2022 R3 (12.0.31)</NEWVER>
18       <UPDATE>09/07/2022</UPDATE>
19       <PUBLIASEAR>YES</PUBLIASEAR>
20       <LANGS>FRA;ENG;ITA;POR;SPA;BRI;GER;POL;CHI;ARB;AUS</LANGS>
21     </FOLDER>
22     <FOLDER ID="X3">
23       <IAD>X3ERFV12</IAD>
24       <VERSION>R090.031.055</VERSION>
25       <RELEASE>R090.031.055</RELEASE>
26       <NEWVER>2022 R3 (12.0.31)</NEWVER>
27       <UPDATE>07/08/2022</UPDATE>
28       <PUBLIASEAR>YES</PUBLIASEAR>
29       <LANGS>FRA;ENG;BRI;CHI;GER;ITA;POL;POR;SPA;ARB</LANGS>
30     </FOLDER>
31   </ACTUAL>
32 </INFOFOLDERS>
33

```

## 7. Setup Endpoint for new folder

Login as ADMIN user

Navigate to Administration, Endpoints, Endpoints

Create new end point for your new folder

## 8. Update any “Administration” functions to integrate the new folder

The migration only brings in the folder data itself. Nothing is updated in the MongoDB data, which is updated by the functions in the “Administration” section

For example, the folder users will be present in the new folder, but these are not automatically created as global users. You would therefore need to review the user information at least, in order for the users to be able to access the new folder. You may also need to consider users security (Menus, Groups, Roles, etc)

## 9. Testing, testing and more testing ☺

Connect to the new folder and check everything works as expected



## Conclusion

This “Build diary” document provides a summary of the steps need to migrate an X3 V6 instance to V12