

Test system Build Diary "Big Build" Part 2 – Upgrade to 2023 R1

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BuildDiary_BigBuild_Part1_Install.pdf



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 inbetween.

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" <u>https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk-support-insights/posts/sage-x3-uk-brace-2021-index</u>) 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 upgrading a multi-node 2022 R4 instance to the latest X3 patch 2023 R1.

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2022 R4 – Multi-Node upgrade to 2023 R1 build diary

Objective

I want to upgrade an existing multiple VM installation from 2022 R4 to 2023 R1.

Current Architecture

Six Windows Server 2022 servers (Server names mzAD, mzDB, mzPRINT, mzWEB1, mzWEB2, mzWEB3)

Software already loaded: Windows Server 2022 OpenJDK 1.8.0_282 Edge, Firefox and Chrome browsers 7-Zip 19.00 Sage X3 2022 R4 (Patch 32) Windows users setup (Local users) "x3admin" for installation and management "X3run" for service runtime

mzWEB1

- Syracuse (12.17.0.33)
- MongoDB (4.4.12.9)
- X3 Runtime (95.2.85)
- AdxAdmin (95.2.85)
- Powershell 7.3.1

mzWEB2

- Syracuse (12.17.0.33)
- MongoDB (4.4.12.9)
- X3 Runtime (95.2.85)
- AdxAdmin (95.2.85)
- Powershell 7.3.1

mzWEB3

- Syracuse (12.17.0.33)
- MongoDB (4.4.12.9)
- X3 Runtime (95.2.85)
- AdxAdmin (95.2.85)
- Powershell 7.3.1

mzPRINT

- Elastic Search (7.16.3)
- Print Server (2.27.0.3)
- AdxAdmin (95.2.85)

mzAD

- MS AD
- Apache Load Balancer (Apache 2.4)

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• X3 Console (2.56.0.19)

mzDB

- SQL Server Database (2019)
- SSMS (18.12.1)

Firewall setup

All servers are in the same MS AD domain. Firewall rules between these servers allow all traffic. Only external traffic needs to be added to the firewall rules, which should only be port 443 into the MZAD server (see notes later in this document).

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Documentation to use for planning and execution of this task

Overall V12 documentation

http://online-help.sageerpx3.com/erp/12/public/index.html

Pre-requisites

http://online-help.sageerpx3.com/erp/12/public/Prerequisites-(Last-version).html http://online-help.sageerpx3.com/erp/12/public/prerequisites_overview.html

Upgrading documentation

Latest release notes (Patch 33 in this case) <u>https://online-help.sageerpx3.com/erp/12/wp-static-content/news/en_US/ReleaseNote/RELNOTE_V12.0.33.htm</u>

Patch readme included in "x3-patch-documents-12.0.33.zip"

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Summary of steps

Planning

Consider what steps will be required for the LIVE migration so the exact same steps can be practiced and validated in the TEST upgrade. Perhaps the most important factors to consider are: Is the test system the same architecture as LIVE? How long is the downtime window for the LIVE migration?

Plan for preventing users from accessing the system, preventing batch jobs from running and preventing any external interfaces from accessing the system during the upgrade process.

Document and agree with the business what testing you need to do before handing over to the users for testing and what testing the users need to do to validate the upgrade has been successful.

Check prereqs, release notes, patch notes and any other relevant documentation to confirm which technology components are needed and what order to apply.

Upgrade steps

Upgrade technology components

- Console 2.57.0
- AdxAdmin 95.2.97
- Runtime 95.2.97
- Syracuse 12.18.0
- Print Server 2.28.0

Upgrade Sage X3 patch level

• Patch 33

Optional upgrade

• SQL Server 2022

Post upgrade

Perform any post upgrade steps. None identified for my configuration.

Run sanity checks before handing over to selected users for more thorough validation, then hand over for user acceptance testing.

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Sage X3 upgrade steps

For my upgrade, I will be shutting all X3 services down during the upgrade process and shutting down my Apache load balancer to prevent all users and any external interfaces accessing the system until I have completed the upgrade and initial testing.

The latest software can be obtained from the ISO image for patch 33, however always remember to check for later versions on the FTP site. In this case there are later updates for Syracuse since the ISO image was released, so this should be downloaded.

Whilst the X3 Print Server latest version is not listed as mandatory, it is recommended to also upgrade.

Windows Server 2022 is certified for patch 33. I do intend to upgrade my Windows SQL Server, but will be done at a later date (Windows 2019 is also certified for patch 33 which is the version I am already using)

Upgrade X3 Console (mzAD server)

https://online-help.sageerpx3.com/erp/12/public/prerequisites_console.html Launch "console-2.57.0.11-win.jar"

Sage X3 Management Console	– 🗆 X
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	and a set
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This product is already installed on this computer un Yee	der the path Dr\Sage\x3Console. Do you want to update this installation ?
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(Made with IzPack - http://izpack.org/)	Next Quit
🌁 IzPack - Installation of Sage X3 Management Console	- D X
Sooo	Perform External Processes
ouge	Step 8 of 1
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Microsoft .Net framework 4.7.2 is already i	1/1 installed
(Made with IzPack - http://izpack.org/)	Previous Next Out

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Upgrade Application Cluster (mzWIN1, mzWIN2, mzWIN3)

Online help (<u>https://online-help.sageerpx3.com/erp/12/wp-static-</u> <u>content/public/Application%20Cluster%20Architecture/Content/How-</u> <u>to%20guides/Platform/Application%20cluster%20architecture/Topic%201%20Application%20cl</u> <u>uster%20architecture.htm</u>) Additional notes when installing Application Cluster (<u>https://support.na.sage.com/selfservice/viewdocument.do?externalId=109651</u>)

Prerequisites

As I am upgrading from 2022 R4 I already have suitable prereqs installed.

Upgrade AdxAdmin

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Yes	No
(Made with IzPack - http://izpack.org/)	Next Ouit
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	3/3
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ADXDIR : D:\Sage\ADXADMIN	
(Made with IzPack - http://izpack.org/)	Description Name

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Upgrade Runtime (mzWIN1, mzWIN2, mzWIN3) Launch "runtime-95.2.97.jar"

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Upgrade Print Server (mzPRINT)

Launch "adxadmin-95.2.97.jar"



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Launch "print-server-2.28.0.10-win.jar"

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🎇 IzPack - Installation of Sage Safe X3 V2 Print Server	-
Sage	Perform External Process Step 10 of
Processing	
15/15	
<pre>UNC paths are not supported. Defaulting to Windows directory.</pre>	_293.log - Please analy
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(Made with IzPack - http://izpack.org/)	Previous Next Quit

Classic Components configuration (mzAD)

https://online-help.sageerpx3.com/erp/12/public/configuration-console_console.html Launch X3 Console

Configure Application and Runtimes

Open the solution

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	Database name		v12				
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Sage X3 Print Server	pwsh[.exe] execution	able fullpath	C:\Program Files\Power 20100	rShell\//pwsh.exe			
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Sage X3 Java Bridge Server	Componer	nt update					2
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Click "Configure Application" and "yes" to continue

Once finished, click "Runtimes"

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Once finished all runtimes should be started and no longer showing in orange

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K3 Sage X3 Configuration Console - CFG.2.57.0	.11 - DEBU	G							
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mzprint example Jan - V12 (DEFAULT	🥬 V12	mzWEB2	20100	D:\Sage\V12\runtime	Started	MAIN	active	Version R095.002.00097 - SHA=96390115a	
	🥬 V12	mzWEB3	20100	D:\Sage\V12\runtime	Started	MAIN	active	Version R095.002.00097 - SHA=96390115a	

Configure Print Server

Open up the Sage X3 Print Server section

Sage X3 Configuration Console - CFG.2.	57.0.11 - DEBUG		- 0 x
Console Sage X3 Print Server Actions	View Tools ?		
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Solutions	🥳 Configuration 🛛 😹 Unconfiguration 🛛 🧝 F	resh 😲 Help Generate script to Configure PrintServer	
Sage X3 Print Server			
3 X G & 2 0	🛃 Configuration for 'D	FAULT' profile	V12 (Direct mode) EDT 2.28
	Sage X3 Print server on mzprint.example.lar		😒 Update 👻 💱 Expert mode 🛛 🧿
SEED	Parameter	Value	
	Print Server service port	51890	
	User ID / PrintServer service	EXAMPLE'x3un	
	User password / PrintServer service		
	Activate ODBC User datasource	on	
Press V2 Webservice and ADC C			
sage A3 Webservice and ADC Server			
Sage X3 Business Intelligence Server			
Sage X3 Java Bridge Server	Component update		2
Sage X3 AdxAdmin Administration Server	A component in update was detected	lease reconfigure t.	0
Sage X3 Documentation Server (V6 only)			
D	🛱 mzprint.example.lan	1895) - EXAMPLE\x3admin	Default runtime: mzWEB1 / V12:20100 +

Click" Configuration" to reconfigure

Upgrade Syracuse (mzWEB1, mzWEB2, mzWEB3)

Check the MongoDB services are running. (MongoDB does not need to be upgraded)

Launch "syracuse-server-12.18.3.1.jar

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👌 IzPack - Installation of Safe X3	Syracuse Server				-		×
Sage					Instal	ation Step 5	Type of 21
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(Made with IzPack - http://izpack.org)						
				Previous	Next	Qu	lit
Sage	Syracuse Server				-	Us Step	× er Data 8 of 21
Evro e	uco comico	configurat	lan				
Syrac	use service	conngurat					
(*) All fields an	e mandatory.		Browso				
Warning : Yo	u must provide an accou	int and a password in ord	er to create a service. This accou	unt must be va	lid and		
Service user	EXA	MPLE\x3run					
Password for	this account	•••••					
(Made with IzPack - http://izpack.or	9/)			Previous	Nex	t	Quit

Once all Syracuse hosts have been updated, login to X3 and check in Administration, Servers, Hosts. All hosts should show as running and with the same version.

Sage 🛛 🛪 🗰								Super administrator	Super administrator	SEED	?	ሰ -	0
All > Administration > Administration > Servers													
Hosts													Action
												0	
Host name	Number of child processes	Deactiva	ited	Started		Status	Security	Code version	1	TCP host nam	ne		
т	т	т		т				т		T			
Maxweb1		2	×		×	ок	×	12.18.3.1-0		mzweb1			
MILEB2		2	×		×	ОК	×	12.18.3.1-0		mzweb2			
mzWEB3		2	×		×	ОК	× .	12.18.3.1-0		mzweb3			

I normally take a full cold backup at this point, before proceeding with the X3 patch.

Updated: 13/06/2023

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Upgrade X3 patch level

In Administration, Utilities, Update, Updates load the "x3-patch-12.0.33.zip" and save, then "Apply Update"

Sage 🛛 🗙 🛗				Super admini	istrator Super administrator 📕 SEED ? 📩	• 🥥
All > Administration > Utilities > Update						F
Updates						Ac
Update Apply to Result status	s Apply state					
Undate						^
opulate		Barrada Marra				
Update	Name	Description	version			
x3-patch-12.0.33.zip Uploaded	X5-patch-12.0.55	x5-patch-12.0.55	1090.033.113			
Upgrades						^
					14 Results Display: 50	- x*
✓ Update to		Update from		Control		
✓ R090.020.000		R090.019			V	
✓ R090.021.000		R090.020.000			V.	
✓ R090.022.000		R090.021.000			×	
✓ R090.023.000		R090.022.000			×	
✓ R090.024.054		R090.023.000			¥*	
✓ R090.025.061		R090.024.054			v*	
✓ R090.026.063		R090.025.061			×	
✓ R090.027.055		R090.026.063			¥	
✓ R090.028.065		R090.027.055			V.	
✓ R090.029.058		R090.028.065			<u>w</u>	
✓ R090.030.062		R090.029.058			×	
 R090.031.055 		R090.030.062			¥	
✓ R090.032.067		R090.031.055			¥	
 R090.033.115 		R090.032.067			M	
Applyto						^
X3 root endpoint	-					
V12 / X3 Endepiete describe sequires lasations	đ					
X3 folders						~
						7
Name Parent Version	Lindated Status	Integration Generation	Log Detailed status	Legislations		
v i v2 80.22.67	15/10/2022		CO5 OCUMENTATION			- 1
•	26/05/2023			ANG ARE ALIS ALIT RELIGHT, BRUCAN CHI		
	2010312023				Concretence our orange restrictioners	
Recult status						
Neoun Status						~
Status Integr	ation status Generation state	is Detailed status				
Apply state						
Ubbil state						<u> </u>
Application Datetim	e Schedule date	time Expiry datetime				
Appried	scheduled					

Once completed, check the screen shows everything as "Success". Check the logs as a precaution.

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								j
Saga 🛛 🛪 🖽							Super administrator Super administrator 📕 SEED 🕐	☆ • (
II > Administration > Utilities > Up	odate							
Ipdates								1
Update Apply to Resu	ult status Apply state							
 R090.020.005 R090.027.055 			R090.025.061					
R090.027.055			R090.026.063					
R090.028.065			R090.027.055					
R090.029.038			R090.028.063				*	
R090.030.062			8000.020.060				¥	
R090.031.055			R090.030.062					
R090.032.067			R090.031.055					
 R090.033.115 			R090.032.067				Ŷ	
X3 root endpoint V12 / X3 Endpoints describe services locations X3 folders		I						
✓ Name Parent	Version Up	dated Status	Integration	Generation	Log	Detailed status	Legislations	
✓ X3	90.32.67	15/10/2022 Success	Success	Success	li I		ANG, ARE, AUS, AUT, BEL, BHR, BRA, BRI, CAN, CHI, DNK, FRA, GER, IRL, ITA, POL, POR, SAU, SPA, SWI, US	4,ZAF
✓ SEED X3	90.32.67	26/05/2023 Success	Success	Success	B		ANG, ARE, AUS, AUT, BEL, BHR, BRI, CAN, CHI, DNK, FRA, GER, IRL, ITA, POL, POR, SAU, SPA, SWI, USA, ZAF	
Result status								
Status	Integration status	Generation status	Detailed status					
Success	Success	Success	Update successful					
Apply state								
Applied Applicatio	on Datetime Scheduled	Schedule date / time	Expiry datetime					
× 12	2/06/2023 16:00 ×							

I also check the versions in Administration, Utilities, Update, About to confirm they all reflect the expected values

80ge X3 🗰				
All $>$ Administration $>$ Utilities $>$	Update			
Technical information	About			
12 18 3 1.0				
Endnointe	Product			
Enopoints	Application			
Dataset	Application			
	Release	Version		
<u>V12_X3</u>	2023 R1 (12.0.33)	90.33.115		
SEED	Server			
	Runtime			
	95.2.97			
	Technical information			
	Connection			
	Solution			
	V12			
	Http address			
	Process server			Application server
	mzWEB2.example.lan			mzWEB2.example.lan
	Folder		Service	
	X3		20100	

Testing

I am now ready to commence my testing to ensure everything works as expected with the new version.

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BuildDiary_BigBuild_Part1_Install.pdf

Saaa



Conclusion

This "Build diary" document provides the steps I took on my internal servers to upgrade from 2022 R4 to 2023 R1.

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