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- Documentation that will help you to complete a successful migration





Introduction

Introduction what is 'Migration'



In Sage X3 terms a Migration is the process of moving data from one instance of Sage X3 to a different instance. The instance you move to will be a later version of Sage X3 where you will update your data typically preparing for user acceptance testing of a new release of Sage X3.

To illustrate



Key Points

- Data Remains unchanged on the source instance and it remains fully operational
- Components on the source instance are not effected
- There is no connection between any of the components or data on the two instances
- You have two functional instances one with the new set of data



Migration or Upgrade

Migration Vs Upgrade



In X3 terms upgrading (formally known as quick upgrade) is the process of updating the Sage X3 components and then the data on a single environment of Sage X3. The end result is a single environment with all components and data updated

To illustrate (Sage X3 in place upgrade)



Key Points

- At the end of the process you have one environment at the new version with new data
- It is not easily possible to revert back to the old environment
- You have to rely on your system snapshots for backups

Which is best ?

Both the migration and upgrade procedure have their own advantages and disadvantages the method you choose will most likely be determined by the resources available in terms of infrastructure, the UAT and go live plan agreed with the customer.

Sage X3 in place upgrade

	Advantages		Disadvantages					
•	No new infrastructure required as long as you still meet the prerequires	٠	Original Instance is overwritten only way to abandon live upgrade is to restore					
•	You can take a snapshot of the existing environment as a starting point	٠	Have to rely on backups if you need to revert for any reason					
٠	There is no need to copy live data during live migration window	٠	Taking a new cut of the source data could be time consuming, if you want to replicate the live source environment and upgrade components again					

Detailed information about upgrading an existing X3 solution can be found in the online help (https://online-help.sageerpx3.com/erp/12/public/getting-started_quick-upgrade-guide.html)

Migration

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Moving on to migration this is what we will be covering today. These are some advantages & disadvantages of the migration process

Sage X3 Migration

Advantages	Disadvantages			
Users can continue to use the source environment	 All X3 and required software needs to be installed in the new environment from scratch 			
 Data at the source environment is not effected 				
 No downtime is required for the live migration 	 Need a separate environment which could be costly and require hardware and software licencing 			
 Potential for a faster transition to the live environment once UAT is complete 	 Need to transfer data including administration data from Mongo DB 			

- Can update your hardware and OS to the latest or even
 change your architecture
 - Time for copying of the Live data needs to be accounted for within the migration window



Pre Migration steps



Mandatory

- 1. Confirm that your data meets the minimum required patch level for the upgrade path
- 2. Run consistency verification & check for any functional prerequisites
- 3. Check for any previous migration tables

Other optional steps

Run the pre migration scripts on the source data (control procedures & loading procedure (optional)

Identify missing indexes

Run table validation

Purge data that is not needed

1. Confirm source data upgrade path



The first step is to make sure that our source data is the minimum version needed to run the upgrade, this table shows the source and target version supported. Upgrading from Version 5 requires an indirect step of upgrading to Sage X3 Version 7

Source version with minimum patch level & Target version

	V7	U8	U9	V11	V12
V6.5 P29	Direct	Direct	Direct	Direct	Direct
V7 P9		Direct	Direct	Direct	Direct
U8 P3			Direct	Direct	Direct
U9				Direct	Direct
V11					Direct

Updated version of the table can be found in the online help at <u>https://online-help.sageerpx3.com/erp/12/public/getting-started_upgrade-of-a-folder_v11&v12.html</u>

Confirm source data version



You can check your current folder version from within Sage X3, from the Sage X3 management console or from your folders.xml file (sage\solution\folders\folders.xml)

1	<	<pre>?xml version="1.0" encoding="utf-8" ?></pre>									
2	□ <infofolders versolsup="R080.002"> All> Administration> Utilities> Update</infofolders>										
3	¢.	<actual></actual>					A 1-	A la sust			
4	白	<folder id="BRI" moth1="X3"></folder>	Technical information					out			
5		<iad>X3ERPV11</iad>									
6		<version>R080.020</version>									
7		<release>80.020</release>	Web server version 11.27.0.1-0				Pro	duct			
8		<patch>20</patch>		277222322							
9		<newver>11.0.20</newver>	Build information release/11.27.0 build 1 of 202	21-05-25			A				
10		<update>26/01/2022</update>	Source version 0/0309af0308ca9d75b76287c93	Scf2da2064bac D(DOVER		Ap	plication			
11		<publiasear>YES</publiasear>	Source version or obsistion obsisters of the or obsister of the or obsister of the obsister of	50120025046000	DORER						
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13	L										
14	F	<folder id="SEED" moth1="X3"></folder>	X3 endpoints	-			Pro	duct update	R080.020		
15		<iad>X3ERPV11</iad>									
16		<version>R080.020</version>	Palazza 80.000								
17		<release>80.020</release>	Dataset				Kei	ease 00.020			
18		<patch>2U</patch>	X3ERPV11 SEED								
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22	L	<td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
24	L.	<folder td="X3"></folder>									
25	Т	<iad>X3ERPV11</iad>									
26		<version>R080.020</version>									
27		<release>80.020</release>			💼 Eoldor						
28		<patch>20</patch>			Folder	5					
29		<newver>11.0.20</newver>									
30	<update>03/07/2021</update>										
31	<pre><pre>Folder Origin Updation</pre></pre>							Release	Update		
32	<langs>FRA; ENG; BRI; CHI; GER; ITA; POL; POR; RUS; SPA; ARB</langs>						11.0.20	80.020	26/01/2022		
33	-						11.0.20	00.020	02/07/2021		
34	-				SEED		11.0.20	80.020	03/07/2021		
35	L <	/INFOFOLDERS>			🗖 X3		11.0.20	80.020	03/07/2021		
36											
_	-										

2. Check for functional prerequisites



Make sure to check for any functional prerequisites these can be found in the online help at the following link

https://online-help.sageerpx3.com/erp/12/public/getting-started_requisites-for-upgrade-of-a-folder-v11&12.html

Prerequisites to the upgrade process
1. Make sure the data to upgrade is consistent. It is not always the case for folders containing many movements and that have gone through maintenance phases (especially if there are specific developments).
2. Go to Development > Utilities > Verifications > Data > Consistencies to detect any problem that could generate errors during the upgrade process and require to restart it.
3. Purge temporary tables that might take a long time to upgrade (for example the query table).
In the case of an upgrade from Version 6 to a higher version, the UUINIFNLPST utility is not included in the upgrade programs. If it has not been executed in Version 6, it should be executed manually before the upgrade.

This is an example of the type of information you may find on the page its advisable to check this on each migration or upgrade as the prerequisites are likely to change.

3. Make sure data is consistent



Navigate to Development > Utilities > Verifications > Data > Consistencies (UTIBASE)

The tool checks the links between SQL tables. Note that the process can take a considerable amount of time so it is recommend to limit your tests and have a detailed read of the function help as the results returned can be difficult to interpret.

All > De	velopment > Utilities > Verification	ns > Data rification	SAGE	New	# <adxvl></adxvl>	0@(#)%I% 21/02/22 17:48:28 (ADMIN) Consistency verification
Datat	base consistency ver	mication	SAGE	ОК		
Folder		First Table Last Table			Differen	nces in the table ACCES
SEED	Q, E	Q E	Q 🖻	Close page	<0001	Key: Incorrect link PRFCOD Towards AFCTFCT (XGST)
	a.	2	0 Records Page size: 10 👻 <u>1</u> 2 🛃	- 🖶 🖉 💬	<0001	Key: Incorrect link PRFCOD Towards AFCTFCT (XSEED)
	Module			Utilities	<0001	Key: ACADAP Incorrect link PRFCOD Towards AFCTFCT (XSEED)
1		Vec	.	Browsing	<0001	Key: ACADAPAD Incorrect link PRFCOD Towards AFCTFCT (XSEED)
2		Vec		Printouts	<0001	Key: ACADVAPP Incorrect link PRFCOD Towards AFCTFCT (XSEED)
-	E S/L and P/L	Var		Field help	<0001	Key: ACCT Incorrect link PRFCOD Towards AFCTFCT (XSEED)
		TES Ver		Function help	<0001	Kev: ACHADMDON Incorrect link PRFCOD Towards AFCTFCT (XSEED)
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5	Sales	Yes	*	,,	<0001	Key: ACHAPPRO Incorrect link PRFCOD Towards AFCTFCT (XSEED)
6	Purchasing	Yes	· · ·		<0001	Key: ACHETEIR Incorrect link PRECOD Towards AECTECT (XSEED)
7	Inventory	Yes	-		<0001	Key: ADCOADEBHC Incorrect link PRECOD Towards AFCITCI (ASEE)
8	Manufacturing	Yes	-		10001	Key: ADCOADERNC INCOFFECT THE PRECOD TOWARDS AFCIFCT (ASEED)
9	Common	Yes	-		<0001	key: ADCOADEIRE Incorrect link PRFCOD Towards AFCTFCT (XSEED)
10	Development	Yes	-		<0001	Key: ADCOADETRH Incorrect link PRFCOD Towards AFCTFCT (XSEED)
					<0001	Key: ADCOADOHD Incorrect link PRFCOD Towards AFCTFCT (XSEED)

Function help for more detailed information (UTIBASE) https://online-help.sageerpx3.com/erp/12/staticpost/consistency-verification/

4. Check for any previous migration tables



It is **mandatory** to ensure that any 'migration tables' from previous migrations have been removed, by running the script TRTMIGDEL.

Development > Utilities > Miscellaneous > Run processes (EXETRT)



```
('UNFILWRK','UNITOFTIME','UNPAID','UPORDER','UPORDERC','UPORDERP','UPORDERQ','USERGUIDES')
ORDER BY s.name, t.name;
```

5. Run the pre migration scripts on the source data (optional)



Pre-migration steps are optional to run on your source instance. Their purpose is to check the data on the source instance before you start the process of extracting your data. The Idea is that you have a chance to fix things before exporting data.

Control procedures (Script - UUMGCTLX3)

These controls can reveal errors or inconsistencies that need to be corrected before launching the upgrade itself. The procedures can be executed ahead of the migration to have enough time to correct the data. However, it is still necessary to relaunch these procedures right before upgrading to the next version to make sure everything is correct.

https://online-help.sageerpx3.com/erp/12/public/getting-started_list-of-X3-upgrade-procedures-by-module-v12.html

Purcha

Module	Procedure	Description
Financials	UUMGCTLCTP00	Entries
A/P-A/R accounting	UUMGCTLTRS00	BP invoices
Sales	UUMGCTLSAL01	Quotation
	UUMGCTLSAL02	Orders
	UUMGCTLSAL06	Deliveries
	UUMGCTLSAL07	Returns
	UUMGCTLSAL08	Invoices

sing	UUMGCTLPUR01	Purchase requests		
	UUMGCTLPUR02	Normal orders		
	UUMGCTLPUR03	Contract orders		
	UUMGCTLPUR06	Receipts		
	UUMGCTLPUR07	Returns		
	UUMGCTLPUR08	Invoices		

5. Run the pre migration scripts on the source data (optional)



Loading procedures (Script - UUMGPREX3)

These revalidate tables by adding additional fields and populating them. Since these procedures are independent from one another, they can be planned weeks before upgrade. Their purpose is to significantly accelerate the actual upgrade steps. **However, they are not mandatory for the execution of the migration**

https://online-help.sageerpx3.com/erp/12/public/getting-started_list-of-X3-upgrade-procedures-by-module-v12.html

Module	Procedure	Description
Common data	UUMGPRETRC04	Pre-loading of fields
		GACCDUDATE table: BPAPAY
	UUMGPRETRC07	Pre-loading of fields
		BPCUSTOMER table: BPAPYR, BPCRSK, CUR, NTNAM, BPAADD, DAYMON, UVYCOD2
	UUMGPRETRC08	Pre-loading of fields
		BPSUPPLIER table: BPAPAY, BPAINV, BPSRSK, CUR, CNTNAM, BPAADD
Sales	UUMGPRESAL01	Pre-loading of fields
		SQUOTE table: BPAORD, BPIEECNUM, 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: BPIEECNUM, EECICT, EECLOC
	UUMGPRESAL04	Pre-loading of fields
		VSORDER table: BPAORD, BPAINV, EECICT, EECLOCC
	UUMGPRESAL05	Pre-loading of fields
		VSORDERC table: BPIEECNUM, EECICT, EECLOC
	UUMGPRESAL06	Pre-loading of fields
		SDELIVERY table: BPAINV
		SDELIVERYD table: PJT

6. Executing the Scripts

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To run all the pre-migration scripts, use the script file **UUMGPREX3** (loading procedures) and **UUMGCTLX3** (control scripts) from the X3 folder these scripts will call all the sub scripts.

Development > Utilities > Miscellaneous > Run processes (EXETRT)

All > Development > Utilities > Miscellaneous Process Execution Script * UUMGPREX3 Q, E	SAGE	New OK Close page
This is a snippet of UUMGPREX3 which will executes all the pre migration loading scripts		<pre>\$ALL_X3PRE Call MAJ_UUMGPRETRCO4(DOSSIER) From UUMGPRETRCO4 Call MAJ_UUMGPRETRCO7(DOSSIER) From UUMGPRETRCO7 Call MAJ_UUMGPRETRCO8(DOSSIER) From UUMGPRETRCO8 Call MAJ_UUMGPRESAL01(DOSSIER) From UUMGPRESAL01 Call MAJ_UUMGPRESAL02(DOSSIER) From UUMGPRESAL02 Call MAJ_UUMGPRESAL03(DOSSIER) From UUMGPRESAL03 Call MAJ_UUMGPRESAL04(DOSSIER) From UUMGPRESAL03 Call MAJ_UUMGPRESAL05(DOSSIER) From UUMGPRESAL04 Call MAJ_UUMGPRESAL05(DOSSIER) From UUMGPRESAL05 Call MAJ_UUMGPRESAL06(DOSSIER) From UUMGPRESAL07 Call MAJ_UUMGPRESAL07(DOSSIER) From UUMGPRESAL07 Call MAJ_UUMGPRESAL08(DOSSIER) From UUMGPRESAL07 Call MAJ_UUMGPRESAL08(DOSSIER) From UUMGPRESAL08 Call MAJ_UUMGPREPUR02(DOSSIER) From UUMGPRESAL08 Call MAJ_UUMGPREPUR04(DOSSIER) From UUMGPREPUR02 Call MAJ_UUMGPREPUR06(DOSSIER) From UUMGPREPUR04 Call MAJ_UUMGPREPUR08(DOSSIER) From UUMGPREPUR07 Call MAJ_UUMGPREPUR08(DOSSIER) From UUMGPREPUR08 Return</pre>

Other optional Steps



Check for missing indexes

Missing indexes may result in poor performance we can use Development > Utilities > Verifications > Database > Search (SQLDICO) which will create a log file comparing indexes defined in the data dictionary with indexes present in the database.

More information about this function is in the online help <u>https://online-help.sageerpx3.com/erp/12/staticpost/identify-missing-indexes/</u>

Table validation

To make sure all the table data is consistent with the definition in Sage X3 we can perform a table validation.

Development > Utilities > Dictionary > Validation > Dictionary (VALDICO)

Purge data

Purge any data that can be purged. This will minimize the amount of data that needs to be carried across to the new instance, reducing CPU, Memory and disk requirements. The purging processes should be tested in a copy of the live folder. It will also be beneficial to clean up folder directories such as tmp, TRA and any unnecessary SVG folders.



Extracting, Moving Data and Importing

Extracting data

- 1. Tables MTCBATCH (matchings) and GACCTMP, GACCTMPD, GACCTMPA (journals) must be empty before extracting the folder data. Migration process at the destination will not start if data exists in these tables.
- 2. Data can be exported using the Sage X3 console or you can use the data extract function DOSEXTRA

Console Solutions Actions View To	ols ?			_	
Welcome	e Data - Application	Runtimes D	atabase scripts Linke	ed servers	olders
Solutions	import Export	Copy	🏠 Remote import 🛛 📔	📩 Change pas	sword Check passwo
Image: Sage X3 ERP V11 on x3erpv11vm [ID Image: Sage X3 ERP V11 on x3erpv11vm [ID Image: Sage X3 ERP V11 vn - X3ERPV11SQL Image: Sage X3 ERP V11 vn - X3ERPV11APP	Folders	5			
🚊 🧰 X3	Folder	Origin	Update version	Release	Update
BRI	BRI		11.0.20	80.020	26/01/2022
x3emv11vm - X3ERPV11BUN (M/	SEED		11.0.20	80.020	03/07/2021
Sage X3 Print Server	SVG directo	ort folder e confirm the bar rry in the data to native dump i n uses Bulk Cop	VG VG illes y utility on MS SQLServ fore export, if it exists	rer, and Export 1	Help Data Pump on Oracle
Sage X3 Business Intelligence Server Sage X3 Java Bridge Server Sage X3 Java Bridge Server	Generate scrip	<u>t</u>		Ok	Cancel
Sage A3 Documentation Server (V6 only)	(50000)				
U Serpvin	/m (50000) - x3admin				

- The process of extracting the data is likely to take a considerable amount of time and will be proportional to the amount of data.
- We can export the data to native dump files using SQL BCP which will speed up the extract & import THIS IS available from console version 2.44.
- It is advisable to run the extraction process when no users are accessing the system and no other processing is taking place in the folder (batch server, SOAP pools etc) as there is no consistency checking during export
- Export log file will be created in the folder TRA directory

Blog Post: Reducing the time taken exporting/importing folder data via the X3 Console - <u>https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk/b/sage-x3-uk-support-insights/posts/how-to-reduce-time-taken-exporting-importing-folder-data-1916367834</u>

Moving Data

Once the SVG extract is complete we need to move two directories from two locations, from the **Solution\folders** directory and the **Folders\x3_pub** to the same locations in the new environment. It will speed up the process considerably if you zip the folders before moving, because the folder names will be the same its advisable to give different names when creating the zipped folders.

↑ → This PC → C-W2K16StdEd-MUI (C:) → Sage « C-W2K16StdEd-MUI (C:) > Sage > X3ERPV11 > Folders > X3_PUB X3ERPV11 → Folders → 5 ~ Search Folde ~ Ō Search X3_PUB Folders Date modified Type PIC Date modified Name Name Type BRI REPORT BRI File folder ADX PORTAL 19/10/2018 03:27 File folder ATT SEED 26/01/2022 16:00 File folder RQT BRI 26/01/2022 16:15 File folder BQE Solution Backup 02/07/2021 23:33 File folder SEED STC 06/06/2019 17:35 File folder Directories moved to destination V12 server > This PC > D-X3V12-App+Data (D:) > Sage > X3ERPV12 > Folders > > This PC > D-X3V12-App+Data (D:) > Sage > X3ERPV12 > Folders > X3_PUB > · 个 ^ Folders Date modified Name Type STC Date modified Name Type BRI BRI 22/02/2022 14:21 File folder SVG ADX PORTAL 04/05/2020 18:12 File fo ATT HSEED 26/01/2022 13:46 File folder tmp BRI 22/02/2022 14:21 File fo LIVE 26/01/2022 13:35 BQE File folder

Directories on source server

Note: Best practice is to move both these directories on each iteration of the migration i.e. MIG1, MIG2 etc and not just the SVG data, as there may have been other changes at source. In that case rename the folders before copying BRI1, BR2 etc

Import data on destination server



Once the data has been copied to the destination server we can use the Sage X3 Management console to begin the import of the data. This process takes a large amount of time proportional to the dataset size.

Sage X3 Configuration Console - CFG.2.53.0.6		🔀 Import a folder - 🗆 🗙	🔀 Configuration — 🗆 X
Console Solutions Actions View Tools ?	Runtimes Database scripts Linked servers	Import an application folder Please specify the name of the folder to import, and the directory containing data.	Folder import
Solutions	🚁 Import 📑 Export 🧊 Copy 🏠 Remote import 🗟 Change password	Name of the folder to be imported BRI V (3) Help	
▶ ▶ ★ 12 12 □ ★ X3 ERP V12 on x3erpv12vm [ID : X3ERPV12] 12 12 □ ↓ x3erpv12vm - X3ERPV12SQL 12 12	Folders	Archived folder v SVG directory SVG v	Progression Parameter Trace
x3erpv12vm - X3ERPV12APP X3 LIVE SEED SEED SEEDV11MIG W x3erpv12vm - X3ERPV12RUN (MAIN - 50012) X3erpv12vm - X3V12PRTSVR (DEFAULT - 50001) X3erpv12vm - X3V12ADCSVR	Folder Origin Update version Release Update HSEED SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 LIVE 2022 R1 (12.0.29) R090.029.058 26/01/2022 SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 SEEDV11MIG 2022 R1 (12.0.29) R090.029.058 26/01/2022 X3 2022 R1 (12.0.29) R090.029.058 26/01/2022	Import of the table structure only Import only Historical folder Import from .dmp files, with Bulk Copy utility and Export Data Pump 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	Folder import BRI : Folder scripts generation Folder import BRI : Database user creation Folder import BRI : Stiftes generation Folder import BRI : Data leading into database X3ERPV Successful completion Folder import BRI : Folder definition generation Message Operation completed. OK
Progression Parameter Trace [22/02/2022] 15:03:51; INFO - 0600/150/1tables loaded - 40% - 1able [22/02/2022] 15:04:00; INFO - 0675/1507 tables loaded - 45% - Table [22/02/2022] 15:04:00; INFO - 0675/1507 tables loaded - 55%; Table [22/02/2022] 15:04:15; INFO - 0750/1507 tables loaded - 55%; Table [22/02/2022] 15:04:25; INFO - 0926/1507 tables loaded - 55%; Table [22/02/2022] 15:04:45; INFO - 09275/1507 tables loaded - 65%; Table [22/02/2022] 15:04:45; INFO - 09275/1507 tables loaded - 65%; Table [22/02/2022] 15:04:45; INFO - 1050/1507 tables loaded - 75%; Table [22/02/2022] 15:04:15; INFO - 1125/1507 tables loaded - 75%; Table [22/02/2022] 15:05:04; INFO - 1125/1507 tables loaded - 75%; Table [22/02/2022] 15:05:04; INFO - 1125/1507 tables loaded - 75%; Table	es EDIXMLHILXSD - FR ICLS are being loaded es FRTCOMCOD - GRPCUR are being loaded es GRPDSP - ITMCUSNOM are being loaded es ITMFACILIT - MTCAUTO are being loaded es MTCBATCH - PHYBUI are being loaded es PHYELT - PREQUISO are being loaded es PHYELT - PREQUISO are being loaded es PHYELT - REQUISO are being loaded es PHYEACK are being loaded es RVMVAL - SPACK are being loaded es SPACKD - STOVAI WRK are being loaded	Sage X3 user ADMIN (V6 only) Password (V6 only) Reference folder X3 X3 Copy folder X3 X3	Folders 5 Folder Update version Release Update Update 2022 R1 (12.0.29) 80.020 26/01/2022
22/02/2022 15:05:24 : INFO - 1275/1507 tables loaded - 85% - Table 22/02/2022 15:05:34 : INFO - 1350/1507 tables loaded - 90% - Table 22/02/2022 15:05:44 : INFO - 1425/1507 tables loaded - 95% - Table 22/02/2022 15:05:57 : INFO - End of database load. (LibAdm.RunVa 22/02/2022 15:05:57 : INFO - Mitting _adxbriseq bat (LibAdm.Run 22/02/2022 15:05:58 : INFO - AdxAdmin x3erpv12vm:50000 connect	es STOWIPW - TABSTASTO are being loaded es TABSTORUL - TMPPRPT are being loaded es TMPREEVAL - WRKPURFCS are being loaded diffimportFolderNT) iValfilimportFolderNT) tion : OK	Generate script Ok Cancel	Image: New York SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: Live 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: SEED 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: SEEDV11MIG 2022 R1 (12.0.29) R090.029.058 26/01/2022 Image: X3 2022 R1 (12.0.29) R090.029.058 26/01/2022



Migration Steps

Migration Preparation



Now that the data is successfully imported, we can progress on to the migration

1. Make sure the batch server is active on the destination server, by checking the batch controllers

AE >	Administration > Administration > Endpoints										
X3 b	X3 batch controllers										
_											0.*
	Code	Auto st	Status	X3 solution	Administrative endpoi	User	Role	Locale preference	Time between two searches (s	Timeout search time (s	Maximum delay to launch a query (minu
	T	Υ.	Υ	T Q	T Q	T Q	T Q	T (२ र	T	T
1	X3ERPV12	~	Running	X3ERPV12	X3ERPV12 / X3	admin Super administrator	Super administrator	English (United Kingdom)	1	5 15	
4											•

 Log into the X3 Folder as ADMIN, Navigate to the folder settings in Parameters, General parameters, Folders (GESADS) & set the MIG flag to Yes in the folder options for the folder you imported. This will create the migration plan after the validation stage. Make any other necessary changes to the folder settings.

Folders		All > Setu	up 💙 General parameters				
	00.2	↑ ↑↓					
Folder	Name	â	General Setup kits Options	Screens Tables Initialize Modifications	liscellaneous Links		
T	T	7	EORI	EORI identification	Supervisor	Yes	*
BRI		8	LEG	Multi-legislation management	Supervisor	No	
LIVE	LIVE BRI ONLY	9	: MIG	Migrations	Supervisor	Ves	· ·
SEED	SEED		•		-		
SEEDV11MIG	SEED folder	10	PAI	Time management fields / PAYE	Supervisor	No	÷

Launch Folder Validation



3. Once you have made changes to the settings press the 'save' button & the validation option will become available

AI	I → Setup → General parameters			Default	•
1	F↑↓↓ Folder generation		Validation	: F	÷
T	au Generali Setupikits Optionis Scheens Tables Initianize mouninationis miscenaneous Links	1	OPTIONS	^	8
	Folder* Name BRI Q :: BRI MIG FROM V11		Log	-	
			Historized folder log	6	Đ

Once you have pressed the 'Validation' button you could choose to select the "Deferred validation" check box It's quicker to complete if you selected this check box because the validation of windows and screens is deferred but then the users will take the performance hit when they use the system interactively

De	ault *
OK Deferred	×
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Log files for the process will be created in the X3/TRA Directory

Keep in mind that when the validation stage completes the folder reverts to multiuser mode even though the next stage (migration) is yet to be completed – because of this we recommend not to create the endpoint until after the migration process is completed

Migration process



Once the validation of the folder has completed the migration steps will automatically be launched. We can check the progress in the sequencing monitor **Usage**, **Migration**, **Sequencing Monitor (AMOULIN)**

All 2 Disage 2 Ministrations								
- O-mendarmenther								
↑ ↑ ↓ ↓ Sequencing monitor							Global log	uery man
Monitor Options List of plans								
â							1	
Identification								
Plan * Description	Folder *	No. of parallel launches *						
MIG0222N01 Q : Migration BRI 20220222	BRI Q. :	1	Phase auto start 🖌	Post-migration au	to start			
Monitor								
Global status Launch date	Launch time Global time (hhh:	mm) Waiting Launch	ed In progress Ov	ver Co	npleted with errors	Suspended	Pending interruption	
In progress 22/02/22	16:59 000:06	69	1 0	25	0	0	0	
Pending stop Interrupted Locked								
0 0								
Control								
Lanch/Resume 🚺 Interrupt 🚺 Stop launches	D Refresh D	Block all Dubloc	kall D					
Monitor								^
i. 9						95 Records Pa	ge size: 1000 🔹 🖠	.*
Code Status	Description	Stage	Module	Phase No	o. process No. to pro	ce Time Spent	Launch ti Update ti	
1 UUMGINISAL01 Over	Quotes	Initialisation		4	0	0 000:00	16:59 16:59	-
1 UUMGINISAL01 Over 2 UUMGINISAL02 Over	Quotes Normal orders	Initialisation		4	0	0 000:00	16:59 16:59 16:59 16:59	
1 E UUMGINISAL01 Over 2 E UUMGINISAL02 Over 3 E UUMGINISAL06 Over	Quotes Normal orders Shipments	Initialisation Initialisation Initialisation		4 4 4	0 0 0	0 000:00 0 000:00 0 000:01	16:59 16:59 16:59 16:59 16:59 17:00	Î
1 E UUMGINISAL01 Over 2 E UUMGINISAL02 Over 3 E UUMGINISAL06 Over 4 E UUMGINISAL07 Over	Quotes Normal orders Shipments Returns	Initialisation Initialisation Initialisation Initialisation		4 4 4 4	0 0 0	0 000:00 0 000:00 0 000:01 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00	Î
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1 E UUMGINISAL01 Over 2 E UUMGINISAL02 Over 3 E UUMGINISAL05 Over 4 E UUMGINISAL07 Over 5 E UUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices	Initialisation Initialisation Initialisation Initialisation		4 4 4 4	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	ĺ
1 E UUMGINISAL01 Over 2 E UUMGINISAL02 Over 3 E UUMGINISAL05 Over 4 E UUMGINISAL07 Over 5 E UUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices	Initialisation Initialisation Initialisation Initialisation		4 4 4 4	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	ĺ
1 UUMGINISAL01 Over 2 UUMGINISAL02 Over 3 UUMGINISAL05 Over 4 UUMGINISAL07 Over 5 UUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices	Initialisation Initialisation Initialisation Initialisation		4 4 4 4	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	ĺ
1 UUMGINISAL01 Over 2 UUMGINISAL02 Over 3 UUMGINISAL05 Over 4 UUMGINISAL07 Over 5 UUMGINISAL08 Over Identification Plan * Description Microspanna Q Image: Microspanna	Quotes Normal orders Shipments Returns Involces Folder * BBI Q :	Initialisation Initialisation Initialisation Initialisation Initialisation	Phase auto start	4 4 4 4 4	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	
1 I UUMGINISAL01 Over 2 IUUMGINISAL02 Over 3 IUUMGINISAL05 Over 4 IUUMGINISAL07 Over 5 IUUMGINISAL08 Over	Quotes Normal orders Shipments Returns Involces Folder * BRI Q :	Initialisation Initialisation Initialisation Initialisation Initialisation	✓ Phase auto start	4 4 4 4 4 9 9 9 0st-migratio	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	
1 I UUMGINISAL01 Over 2 IUUMGINISAL02 Over 3 IUUMGINISAL05 Over 4 IUUMGINISAL07 Over 5 IUUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices Folder * BRI Q :	Initialisation Initialisation Initialisation Initialisation Initialisation	✓ Phase auto start	4 4 4 4 4 9 Post-migratio	0 0 0 0	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	*
1 Image: UUMGINISAL01 Over 2 IUUMGINISAL02 Over 3 IUUMGINISAL05 Over 4 IUUMGINISAL07 Over 5 IUUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices Folder * BRI Q : Launch time Global time (hhl	No. of parallel launches *	Phase auto start thed In progress	4 4 4 4 4 9 Post-migration	0 0 0 0 0 n auto start Completed with errors	0 000:00 0 000:00 0 000:01 0 000:00 0 000:00 Suspended	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00	*
1 Image: UUMGINISAL01 Over 2 IUUMGINISAL02 Over 3 IUUMGINISAL05 Over 4 IUUMGINISAL07 Over 5 IUUMGINISAL08 Over	Quotes Normal orders Shipments Returns Invoices Folder * BRI Q : Launch time Global time (hhl 16:59 000:24	No. of parallel launches *	Phase auto start thed In progress 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	4 4 4 4 4 9 Post-migration	0 0 0 0 n auto start Completed with errors	0 000:00 0 000:01 0 000:01 0 000:00 0 000:00 Suspended 0	16:59 16:59 16:59 16:59 16:59 17:00 17:00 17:00 17:00 17:00 Pending interruption	0

- The global status is over this means the migration process has completed
- 95 Scripts were executed on the data
- None where completed with errors
- Each error would need to be investigated and corrected before the go live.
- The Trace file for the migration process will be generated in the X3\TRA Folder
- By default parallel launches is set to 1 this defines the number of migration tasks that will run in parallel
- There is the option of creating your own migration plan



Post Migration steps

Post Migration



Review the folder validation and migration log in Folders\X3\TRA for any errors. The start if the log will look like this and have the MIG value as 2. After the validation, the log will go through the migration scripts execution and results

1	# <adxvl>@(#)%I% 22/02/22 16:09:20 (ADMIN) Folder validation BRI</adxvl>
2	Generation start 22/02/22 16:09:21
3	_AUPDATE_FIRST : creation of file with numseq 18
4	maxmem=67108864
5	22/02/2022 16:09:21 : Directory update
6	Directory creation D:\Sage\X3ERPV12\Folders\X3_PUB\BRI\GEN\BRI\FENSJ
7	22/02/2022 16:09:21 : TRTMIGRAZX3 : Process Start on : BRI
8	22/02/2022 16:09:22 : TRTMIGRAZX3 : END.
9	22/02/2022 16:09:22 : TRTMIGTABX3 : Process Start on : BRI
10	22/02/2022 16:09:22 : TRTMIGACV Activity Code : MIG -> value 2 -
11	TRTMIGACV : Process Start on : BRI

2. Review the folder settings in Setup, general parameters, Folders (GESADS) to make sure the MIG flag is now disabled

Folders		All 📏 Se	tup)	General	parameters									
	00 .*	<u>⊼</u> ↑↓	<u>↓</u>	Folde	er generati	on								
Folder	Name	â	Ge	neral	Setup kits	Options	Screens	Tables	Initialize	Modifications	Miscellaneous	Links		
T	т		8	LEG		Multi-legislati	on managem	ent	******	Supervisor	No		v	
BRI	BRI MIG FROM V11		9 :	MIG		Migrations				Supervisor	No		*	1
LIVE	LIVE BRI ONLY		. :	DAL			mant fielde (DAVE		Cupanisar	Na			-
SEED	SEED		• :	PAI		nime manage	ment nelds /	PATE		Supervisor	NO			

Post Migration

sage

3. Execute any functional post migration steps, refer to the online help

https://online-help.sageerpx3.com/erp/12/staticpost/functional-prerequisites-and-postrequisites-for-themigration-of-a-folder-4

4. Clean up the migration tables, as mentioned in the pre migration steps we can use the script TRTMIGDEL you can defer this to a later stage i.e., after testing

5. Check folder version information in the Sage X3 console. After the initial import this was showing as 80.20 which is patch 11 patch 20



6. Setup endpoint for the migrated folder by navigating to Administration, Administration, Endpoint

	sage	Х3					Super administrator	Super administrator	X3ERPV12/)
AI	Administrat	tion >	Administration $>$	Endpoints					
E	ndpoint								
	Informati	ion	Location	Server parameters		Administration			
	Informat	ion							^
	Name *					Description *			
	BRI]	MIGRATION FROM V11	:		

Post Migration

7. Transfer administration data. This process will only bring across the folder data only and not any of the administration data that is stored in MongoDB. The Admin data could be brought over to the new instance prior to the migration to reduce the overall migration time window.

Worked example on how to copy administration data

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&external Id=106053

During Mongo Installation

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&external Id=85119

Syracuse server migration tool

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&external Id=75400

8. The last step get users on the system and commence your test plans







Useful Resources

Online help and documentation

• Easy Upgrade guide

https://online-help.sageerpx3.com/erp/12/public/getting-started_quick-upgrade-guide.html

• Folder upgrade / migration guide

https://online-help.sageerpx3.com/erp/12/public/getting-started_upgrade-of-a-folder_v11&v12.html

• Functional prerequisites and post requisites for the upgrade of a folder

https://online-help.sageerpx3.com/erp/12/public/getting-started_requisites-for-upgrade-of-a-folder-v11&12.html

• List of upgrade procedures by module

https://online-help.sageerpx3.com/erp/12/public/getting-started_list-of-X3-upgrade-procedures-by-module

• Installing Sage X3

https://online-help.sageerpx3.com/erp/12/public/getting-started_sage-erp-x3-installation-procedure.html

Useful Blogs & KB Articles

Executing Pre migration Scripts

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=88161

Folder validation not complete during migration

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=113317

Migration Plan created in Sequencing Monitor, but queries do not run in the batch server

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=82477

How to transfer MongoDB data to the new version during migration

https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=85119

Blog: Should I "Easy Upgrade", "Folder Upgrade" and/or "Migrate" my Version 11 (or earlier) instance to Version 12?

https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk-support-insights/posts/should-i-easy-upgrade-folder-upgrade-and-or-migrate-my-v11-instance-to-v12

Blog: Test System build diary Index (upgrade diaries)

https://www.sagecity.com/gb/sage-x3-uk/b/sage-x3-uk-support-insights/posts/index-page-build-diaries

Thank you



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