Test system Build Diary

2021 R4 (V12 patch 28) Migration from PU9 (9.0.11)

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### 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**

Author: Chris Cobbold, Sage UK X3 Support Team

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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" <u>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</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 (<u>https://sageu.csod.com/catalog/CustomPage.aspx?id=20000242#tc</u>)

#### 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 how to migrate all the components to a PU9 instance to the Release 12.0.28 on an existing single-server installation.

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## PU9 to V12 Patch 28 upgrade process

### Starting Architecture

### Single server (X3PU9TRAINVM)

- Windows Server 2012 R2 Standard
- Syracuse 9.18.1-0
- MongoDB 3.4.16
- Elastic Search 1.5.1
- X3 Application PU9
- X3 Patch 9.0.11
- X3 Runtime 19r.113
- X3 Console CFG.2.43.0.34
- X3 Print Server EDT.2.18
- Web Server (ADC) WEB.236.1
- Apache 2.2.25
- SQL Server Management Studio 2014
- SQL Server 2014 (SP3-CU-GDR) (KB4535288) 12.0.6372.1 (X64)
- JDK Zulu 1.8.0\_232 \*\* No need to upgrade

Not upgrading the following components (will disable these services):

• Java Bridge Server 16j.223.2

#### **Multiple folders**

- SEED
- UAT
  - History (archive) folder
- LIVE (BRI only, newly created folder)

### Overview of upgrade activities

#### Upgrades

Advadmin	0/10
Auxaumm	94.1.9
Console	2.52.0
Print Server	None required at this patch level (Out of Scope)
Runtime	94.1.9
Syracuse	12.13.0
X3 (full)	12.0.28
X3 hotfix	12.0.28
Elastic Search	7.9
X3 Services	11.0.43

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### Preparation

Copy and extract the required patches to the software directory Update Windows Server, Notepad++ and Firefox/Chrome browsers

#### Review Documentation and setup workplan document

Check the patch instructions in "x3-patch-documents-12.0.28" directory

Access Online Help ( <u>http://online-help.sageerpx3.com/erp/12/</u> )

- How To> Technical> Architecture and system requirements
- Whats New> Release Notes 2021 R4 (Version 12.0.28)
- Technical help> Upgrade> public technical help
  - Before you start
    - Prerequisites overview
      - V12 prerequisites
  - Technical help> Upgrade
    - Easy upgrade guide

#### **KB** articles

- Additional notes when upgrading ElasticSearch (<u>https://support.na.sage.com/selfservice/viewdocument.do?externalId=99424</u>)
- Additional notes when upgrading to MongoDB 3.6 (<u>https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=103072</u>)
- Additional notes when upgrading to MongoDB 4.x (<u>https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=107620</u>)

Upgrading SQL Server

https://docs.microsoft.com/en-us/sql/database-engine/install-windows/upgrade-sql-server?view=sql-server-ver15

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### Summary of steps to apply 2021 R4

- Gather required Sage X3 Component Archives.
- Check Pre-requisites and ensure you have the supported versions of external/third-party software (Elastic Search and MongoDB).
- Ensure that you are familiar with the Upgrade process for external/third-party software.
- Apply all Software Components required to upgrade to 2021 R4.
- Run any existing set of checks after applying 2021 R4 e.g. Printing, Batch Server, LDAP Syncs, Web Services.

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Documentation to use for planning and execution of this task

Sage Online documentation Overall V12 documentation http://online-help.sageerpx3.com/erp/12/public/index.html

Pre-requisites <u>http://online-help.sageerpx3.com/erp/12/public/Prerequisites-(Last-version).html</u> <u>http://online-help.sageerpx3.com/erp/12/public/prerequisites\_overview.html</u>

Installation documentation

http://online-help.sageerpx3.com/erp/12/public/getting-started\_sage-erp-x3-installation-procedure.html

Application Server : <u>https://online-help.sageerpx3.com/erp/12/staticpost/installing-the-application-server/</u>

Console: https://online-help.sageerpx3.com/erp/12/public/configuration-console\_console.html

#### Sage Knowledgebase articles or Blogs

Additional notes when regarding Sage X3 Lifecycle Policy:

IMPORTANT REMINDER: Sage X3 Lifecycle Policy - Sage X3 UK Announcements, News, and Alerts - Sage X3 UK - Sage City Community

Sage X3 2019 R4 enhancement : Cumulative patching (sageerpx3.com)

Sage X3 Lifecycle Policy: https://support.na.sage.com/selfservice/viewdocument.do?externalId=105518

Additional notes when upgrading ElasticSearch

https://support.na.sage.com/selfservice/viewdocument.do?externalId=99424

Sage X3 Pre-requisites : Installing Sage X3 | (sageerpx3.com)

MongoDB Administration & Upgrade : Part of the Autumn 2021 Business Partner day Blog: (+) Index page: Sage X3 Technical Support Tips and Tricks (September 2021) - Sage X3 UK Support & Insights - Sage X3 UK - Sage City Community

Upgrading from 3.4 to 3.6 Follow KB article 103072 <u>https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=103072</u> Upgrading from 4.0 to 4.2 Follow KB article 107620 <u>https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=107620</u>

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### Initial steps

Ensure that the Sage X3 Pre-requisites are adhered-to – see article-link above.

Update Firefox, Chrome and Edge to make sure I'm on the latest browser versions –- please note that the supported Firefox Browser version has changed from V78+ to V79+ for 2021 R4.

Copy over latest Sage Support "Investigation Scripts"

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## Apply technology component patches

- Update Console 2.52.0

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- Update Adxadmin 94.1.9

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Service start		
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WIN32_EXIT_CODE SERVICE_EXIT_CODE CHECKPOINT WAIT HINT	: 0 (0x0) : 0 (0x0) : 0x0 : 0x0	
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- Update Runtime 94.1.9

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sage	Perform External Processes Step 10 of 11
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Language : 1033 GUID found : (DBCD7798-30AE-474B-A733-717996DCCA41)	<u>^</u>
Release to Install (17.7.2.1) > Release already installed (17.6.1.1)	
Uninstallation in progress	
Command line executed: msiexec /quiet /passive /qn /norestart /l*v C:\Sa	ge\X3PU9TRAIN\Runtime\
Command line ExitCode: 0	
Uninstallation done	
Installing Microsoft ODBC Driver 17.7.2.1 (x64) in progress	
Command line executed: msiexec /quiet /passive /qn IACCEPTMSODBCSQLLICEN	SETERMS=YES /1*v C:\Sa
Command line ExitCode: 0	
Installation done	
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	×
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- Update X3-Services 11.0.43

#### Instructions:

From directory :-C:\patch28\x3-services-11.0.43-win\x3-services-11.0.43-win

Run this script from a PowerShell prompt with administrator privileges .\nodejs\win32-x64\node.exe .\service.js install

#### Ensure the Powershell command :-

Set-ExecutionPolicy -Scope Process -ExecutionPolicy Bypass

#### Is executed to bypass scripts that are not digitally signed:-

8	Windows PowerShell ISE (x86)
File Edit View Tools Debug Add-ons Help	
PS C:\patch28\x3-services-11.0.43-win\x3-services-11.0.43-wim- Set-ExecutionP	olicy -Scope Process -ExecutionPolicy Bypass
PS Cipatch28(x3-services-11.0.43-win/x3-services-11.0.43-win» .\install.ps1 Install complete. Start complete.	
PS C:\patch28\x3-services-11.0.43-win\x3-services-11.0.43-win>	

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- Update Application component 12.0.28 (x3-application-12.0.28.jar)

IzPack - Installation of Sage X3 Application Component	
sage	Installation Type Step 4 of 13
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- Restart Windows Server
- Use X3 console to reconfigure Runtime server



Select Solution:

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Added ODBC tools path (from drop down)



Click "Save"

Click "Configure Application"

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- Upgrade MongoDb from 3.6.14 to 4.2.12

Make sure Syracuse service is stopped

Ensure Mongo Storage is set to WiredTiger

If not :-Edit mongodb.conf

> operationProfiling: slowOpThresholdMs: 10000 engine: wiredTiger ## engine: mmapv1

Stop MongoDB service Rename data directory then create new empty data directory Start MongoDb service Run "mzRunMongoRestore.cmd" to pull the Syracuse data back in

a. Upgrade to Mongo 4.0.18.84

Review KB 103072 for more information if needed

IzPack - Installation of Safe X3 MongoDB	
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	Previous Next Qut
Service configuration	
C Configure the monop008 service Service port number [27017 Enable (pv6 support	
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Repeat above for 4.2.12.10 version, do mongodump between each version as a backup

Ensure parameter below is set within Mongo. Access the Mongo Shell and enter Set db.adminCommand( { setFeatureCompatibilityVersion: "4.0" } )

Recheck/edit the config file Change slowOpThresholdMs back to 10000

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- Upgrade to SyracuseServer 12.13.0

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sage User Step 8	Data of 21
Syracuse service configuration	
(*) All fields are mandatory.	
Path for logging information files C:\Sage\SAFEX3\V3PU9SYRA\syracuse Browse	
Warning : You must provide an account and a password in order to create a service. This account must be valid and must have the "log on as a service' right.	
Service user x3run	
Password for this account	
Nace with laffect - http://tigack.org) Previous Next Q	<i>i</i> t
Processing	
7/7	
Import done, 36 object(s) were created, 61 object(s) were modified, 0 errors Import done, 36 object(s) were created, 68 object(s) were modified, 0 errors	
Import dome, 0 object() were created, 1 object(s) were modified, 0 errors Import dome, 3 object(s) were created, 2 object(s) were modified, 0 errors Import dome, 0 object(s) were created, 150 object(s) were modified, 0 errors Import dome, 0 object(s) were created, 0 object(s) were modified, 0 errors Import dome, 0 object(s) were created, 0 object(s) were modified, 0 errors Import dome, 1 object(s) were created, 0 object(s) were modified, 0 errors Import dome, 1 object(s) were created, 0 object(s) were modified, 0 errors Ifager errore Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver Interver	
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### Finishing X3 update steps

1. Check the Patch-level in Administration > Utilities > Updates > About

All > Administration > Utilities >	Update			
Technical informati	About ?			
Endpoints	<b>Product</b>			
Dataset	Release	Version		
EMV12_X3	2021 R4 (12.0.28)	90.28.65		
SEED	Server			
	Runtime			
	94.1.9			

#### Login as ADMIN user and check hosts



### Update License

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#### Update supervisor

Login to X3 as ADMIN Connect to X3 folder Launch classic function Parameters, Users, Users



#### Run Personalisations and menus initialisation

Administration> Administration> Endpoints> Endpoints

Select "X3PU9TRAIN\_X3" folder, then run "Personalizations and menus initialization"

sage xa 🚍					0	Super administrator 1
The second	ameters Administration		O Jaio Sille	100 % Perconalisations and Mer initialisation		
Information Name X3PU9TRAN_X3	Description x3PJ97RAIN / X3		Phase Start date Start time Elapsed seconde Remaining seconds	Gungdeted 94/05/2021 98:50 82 9		
Location Application SILER Application and contract identify a service	T		Import done, 433     object(s) were mod     Import file & erp     Import done, 30     whject(s) were mod	7 object(s) were created, 605 Med, 0 errors -authoring.juon object(s) were created, 292 Med, 0 errors		
Server parameters x3 solution x20xx176an X solution restroge Help Bases URL	1	Server folder X3	O import file 3 wrp Ro	hamapagasjson Haranca foldar		Historical fel X Is this endpoint

### Logout and login

Check versions, select the X3 folder

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ige x3 m	Super administrator Super administrator X3PU9TRAIN / X3 🕜 📩 🚽	Ø (
Administration > Utilities > Update		Default
chnical information		Actions
eb server version	Build information	
2.13.0.31-0	release/12.13.0 build 31 of 2021-10-18	
surce version	Streamline options	
83d48c9272aedbdae7636c7d89e3451b566d86f-DOC !R	("runtime":"fibers","quiet":true."typescript":("module": 1."moduleResolution":2."target":1."sourceMap":true))	
ndpoints		
	6 Records Page size: 50 👻 🚅	
Dataset	Description	
LIVE	LWE	
seedhist	Seed History	
LIAT	UAT	
HISTUAT	UAT History	
X3PU9TRAIN SEED	X3PU9TRAIN / SEED	
	V3010783301 / V3	

### Check/update the batch server

Decided to do this first so I could run the folder validations all together through the batch server. Be aware that existing batch jobs ready to run against the child folders when the batch server comes up shouldn't work and will therefore abort!

Set to "Auto start" and set value for "Maximum active queries" from 2 to 10

A8 > Administration > Administration > Endpoints									Default
X3 batch controller хачитким									Actions
Information Context Configuration Ru	untimes								
Information									~
Code	Auto start	Status							
X3PU9TRAIN	×	Stopped							
Batch controller code is identical to X3 solution code	Defines if the batch co								
Context									
Context									
X3 solution		Administrative endpoint			User				
X3PU9TRAIN	1	X3PU9TRAIN / X3	folder und for administration to the	:	Datch				
As solution and each company carries of chimage		Endpoint corresponding with mother i	NUMBER OF A CONTRACT OF A CASES		User used for administ	ative tasks			
Role		Locale preference							
Super-administrator	1	English (United Kingdom)		1					
Role used for administrative tasks		Language used for administrative task							
Configuration									~
New Automation from complex (see)	Name of the second stress		Mandana dalar ta karat a						
Time between two searches (sec)	Timeout search time	(sec)	Maximum beray to launch a que	ry (minutes)	Maxim	am active queries	10		
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Runtimes									^
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Server host Server part	Tags	Tag exclusive	Bao timeou		Blacklister	,	uto coofie	Disabled	
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1 velanomian	30190 MAIN		-			~		~	

Start batch server and make sure it is running

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Note:

An error was returned : " Create Session error : X3 engine error: EVENTS: Non-existent label "

A root cause is currently being investigated, however a workaround solution has been found:-Workaround: In the Batch Controller screen, Administrative Endpoint field, Change value Seed History to X3

The batch controller can then be started.

#### Revalidate child folders Login and connect to X3 folder

First stopped Web Pools and Elastic Search service, to reduce load

Navigate to Parameters, General Parameters, Folders Edit each child folder record, check/change option "MIG" = "Yes" (For LIVE, UAT and SEED folders) Make some small change and re-save the record

You can do revalidate the folders individually, but in this case we will run all at the same time via the batch server

Usage, Batch server, Query management

Launch three new queries with task code "VALDOS" for each of the three folders:

- SEED UAT
- LIVE

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#### NOTE: we are running as three separate jobs to run in parallel

### Run HUAT afterwards as a separate job

Select the date and time, and click Validation on the right-hand panel.

Query submission ⑦	i ×
Folder *         User code *         Password           -> XO         Q	•
Group         Task Cede ◆         Folder Validation         Language         Date           →         →         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓         ↓	<b>₽</b>

#### Select the folders to be validated and then click OK

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1         1         54         1/3         344,005         BH         AMAM 200/021         15/10         No         Standby         Processing           2         2         2.3         32         MALDOS         BH         AMAM 200/021         15/10         No         Standby         Processing           1         52.57         MALDOS         BH         AMAM 200/021         15/15         No         Standby         Processing		Number Folder	Task Code	La	User D	ate	Time	One	Status	End Ti	End date	Task Type	Script	Serve	;	Port 5	
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52 X3 VALDOS BRI ADMIN 2007/21 15:05 No Standby Processing	2	53 X3	VALDOS	BRI	ADMIN 20	0/07/21	15:07	No	Standby			Processing					
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Took 3 hours from starting first one to finishing last one

#### Check for any additional patches to apply in the PATCH directory of the installation media

First need to update per "How can I enable/disable Automatic Window Validation as part of Cumulative Patching since X3 V12.0.21 / 2020 R1 Update?" ( https://support.na.sage.com/selfservice/viewdocument.do?externalId=107874)

For SEED, LIVE and UAT folders, navigate to Parameters, General Parameters, Parameter values
Select SUP, PRF
Change LAUNCHSYNC parameter to "No"
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#### Save change

dule JP erviso Np	Legisl	ation Company Site				
Q	CHE			15 Records Page ti	7#: 20 ¥	
	Parameter	Description	Value	Set of.	Level	
1	AUZMEMO	Create all memos	Yes	91	Folder	-
2	CLOMAX	Max Nbr	0	9.1	Folder	
3	LAUNCHSYN	Sync launch after patch integr	Not	Q.I.	Folder	
4	MAXSPEACV	Specific ACV limit	300	9.1	Folder	
5	MAXUPDTRS	Update transaction limit	1000	G 1	Folder	
4	MEMTRE	Size of text memory (R2)	512	9.1	Folder	
7	NETRABUFE	Number of lines in memory	50	Q. I	Folder	
	NOTFIEC	Threshold for last read access	0	91	Folder	
9	ORAOPTMIZ	Oracle optimisation	Ves	Q. I	Folder	
12	ORAOPTNB	Oracle optimisation	0	Q. I	Folder	
**	ORATRAPATI	Oracle optimisation		9.1	Folder	
12	ROLLBACK	Lock attempts before rollback	3	Q, I	Folder	
13	SELWARN	Limit for control memos	10000	9.1	Folder	
14	TIMLOK	Unlock time in seconds	5	Q. I	Folder	
15	TIMOUT	Time limit for response	30	9.1	Folder	

Logout, then login again

### Apply Hotfix\_12.0.28.zip Navigate to Administration, Utilities, Update, Updates Load file "HotFix\_12.0.28.zip"

S Updates (Super administrator)   ×	+										
€ → ሮ ŵ	0 localhost/8124/syracuse-main/html/r	nain.html?url=http%3A	%2F%2Flocalhost%3A8124%2	Fsdata%2Fsyracuse%2Fcoilabor	ition%2Fsyracuse1 ••• 🗵	Q Search				III 🗉	8
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Al > Administration > Utilities > Update											Default
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Root endpoint     S3PU9TRAIN / X3										q	
Result Status Applied Application Datatime	Schedule date/time	Integration status		Generation statu		Detailed s	tatus			,	•

### Upgrade ElasticSearch to 7.9

Follow "Additional notes when upgrading ElasticSearch" <u>https://support.na.sage.com/selfservice/viewdocument.do?externalId=99424</u>

#### Update Search index

Navigate to Administration, Usage, Search Index Management Select the data source endpoint to index (SEED) Enter the Locale for which the index must be updated (Leave as default) Select Delete index before update Click Update index

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## Conclusion

This "Build diary" document provides an informal list of steps to upgrade from PU9 to 2021 R4.

Hopefully, this document will provide guidance on how to carry out an upgrade.

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