



V1
Document
Management

EDM for Sage X3 by V1

Electronic Document Management

PIA for Sage X3 by V1

Purchase Invoice Automation

SOA for Sage X3 by V1

Sales Order Automation

Release 12.1

FAQ – Server Migration Procedure

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1. Introduction

This document details the steps necessary to move the installed EDD / EDM / PIA / SOA for Sage X3 by V1 server components from one server to another.

This documented is intended for experienced engineers and should under no circumstances be attempted by support, customers or partners.

Mistakes can lead to unrecoverable loss of data and both corruption of the EDM / PIA / SOA databases and / or Sage X3 Folder / Endpoint.

If a migration is attempted and data loss / corruption occurs, V1 or Sage take no responsibly for resultant issues.

In the majority of cases, V1 will recommend 2 days of Professional Services to manage the migration, for details, contact your local partner or V1 account manager.

2. Assumptions

EDM for Sage X3 by V1 is installed on the Sage X3 Application server SAGESERVERA and there has been a requirement to move it to SAGESERVERB.

All paths / ports referenced **in red** in this document are for example purposes only and can be anywhere on the Sage X3 application server provided they are a physical drive and fully accessible.

You are advised to use the same installation paths on SAGESERVERB as were used on SAGESERVERA as this will make the migration much easier.

- ▶ **The Sage X3 solution / Folder(s) / Endpoint(s) present on SAGESERVERA have been migrated to SAGESERVERB i.e. Sage X3 must *already* be moved, tested and working *before* attempting a migration of EDD / EDM / PIA / SOA**
- ▶ SAGESERVERA and SAGESERVERB are both accessible at the same time, there is a requirement to copy files from one to the other
- ▶ The engineer performing the necessary tasks has knowledge of the Sage X3 architecture i.e. paths, ports, usernames / passwords and file locations
- ▶ The EDM for Sage X3 by V1 distribution is present on SAGESERVERB uncompressed and in the **D:\EDMDISTRIB** directory
- ▶ The licenses for EDM for Sage X3 by V1 distribution are present on SAGESERVERB, uncompressed and in the **D:\EDMLICS** directory
- ▶ The documentation on the portal is accessible on SAGESERVERB
- ▶ The user who is logged in to SAGESERVERB has access to the SAFE X3 Console

As the Sage X3 solution has been moved, there is technically no need to re-patch because all the EDM / PIA / SOA patches will have also been migrated, however SAGESERVERB will have no server or client components installed.

Perform the following steps in order ensuring to complete the post migration checklist.

3. Example Environments

- ▶ The EDD / EDM / PIA / SOA for Sage X3 by V1 components are installed on SAGESERVERA in the **D:\SAGE\V1** directory
- ▶ The EDD / EDM / PIA / SOA for Sage X3 by V1 components are to be installed on SAGESERVERB in the **D:\SAGE\V1** directory

IF PIA / SOA has been installed:

- ▶ Log on to SAGESERVERA as the user who originally installed EDM / PIA / SOA
- ▶ Navigate to D:\SAGE\V1\DbCapture\ABBYY\BIN directory
- ▶ Run the LicenseManager.exe and deactivate the license by right clicking on it and selecting Deactivate and following the on screen instructions.

Ensure no users are using EDD / EDM / PIA / SOA on either SAGESERVERA or SAGESERVERB and logged out of all clients as this will cause them issues using it and with the migration procedure.

4. Install the Server components on SAGESERVERB

Follow all steps in the installation guide except patching (this is not needed as they will have been brought over as part of the Sage X3 migration.)

- ▶ If installing PIA / SOA when prompted, activate the license as normal (the same one that was deactivated on SAGESERVERA)

5. Copy system settings from SAGESERVERA

- ▶ Log on to SAGESERVERA as the user who originally installed EDM / PIA / SOA
- ▶ Open services.msc and stop the 'DbLogin Server' service
- ▶ Navigate to the D:\SAGE\V1 directory and take a copy of the D:\SAGE\V1\DbLogin directory
- ▶ Go back to services.msc and restart the 'DbLogin Server' service so users can continue to use the system on SAGESERVERA

6. Migrate system settings from SAGESERVERA to SAGESERVERB

- ▶ Log on to SAGESERVERB, open services.msc and stop the 'DbLogin Server' service
- ▶ Navigate to the D:\SAGE\V1 directory and take a backup of the D:\SAGE\V1\DbLogin directory
- ▶ Paste the copy of D:\SAGE\V1\DbLogin you took on SAGESERVERA into this location
- ▶ Open services.msc and start the 'DbLogin Server' service
- ▶ You have now migrated all your users and their settings from SAGESERVERA to SAGESERVERB

7. EDM / PIA / SOA – Backup database(s) on SAGESERVERA

On the database server:

EDM:

- ▶ If SQL
 - ▶ Using the SQL management studio, take a backup of the **X3EDM_DB** database
- ▶ If Oracle
 - ▶ Take a backup of the data in the **X3EDMDB** database

PIA / SOA:

- ▶ Using the SQL management studio, take a backup of the **X3OCR_DB** database

8. EDM / PIA / SOA - Restore database(s) from SAGESERVERA to SAGESERVERB

The installation procedure on SAGESERVERB will have created blank databases assuming a new installation, the data can now be restored:

On the database server:

EDM:

- ▶ If SQL
 - ▶ Using the SQL management studio, restore the backup of the **X3EDM_DB** database
- ▶ If Oracle
 - ▶ Restore the data in the **X3EDMDB** database

PIA / SOA:

- ▶ Using the SQL management studio, restore the backup of the **X3OCR_DB** database

9. EDD - Restore bespoke changes to scripting file

If bespoke changes have been made on SAGESERVERA beyond the standard, they must be re-instated on SAGESERVERB.

- ▶ Take a copy of D:\SAGE\V1\dpdf\DBPDF.def from SAGESERVERA
- ▶ Backup the D:\SAGE\V1\dpdf\DBPDF.def renaming it DBPDF.def.STANDARD on SAGESERVERB
- ▶ Copy D:\SAGE\V1\dpdf\DBPDF.def from SAGESERVERA into the same location on SAGESERVERB

10. EDM – Restoring bespoke changes on SAGESERVERB

If bespoke changes have been made on SAGESERVERA beyond the standard, they must be re-instated on SAGESERVERB.

The installation procedure on SAGESERVERB will have installed the standard solution, this needs to be essentially overwritten with the bespoke changes already working on SAGESERVERA.

Follow the steps in the 'EDD – Restore scripting file' if bespoke changes have been and in addition:

- ▶ Take a copy of D:\SAGE\V1\DbArchive*.defs from SAGESERVERA
- ▶ Take a copy of D:\SAGE\V1\DbArchive_tables.ini from SAGESERVERA
- ▶ On SAGESERVERB:
 - ▶ Open services.msc and stop both the 'DbArchive*' services
 - ▶ Take a backup of the D:\SAGE\V1\DbArchive directory D:\SAGE\V1\DbArchive.STANDARD
 - ▶ Copy in to the D:\SAGE\V1\DbArchive directory the files you copied from SAGESERVERA overwriting them
 - ▶ In the D:\SAGE\V1\DbArchive dir, delete the following files:
 - ▶ _TABLES.dat
 - ▶ _tables.ini
 - ▶ tables.ini
 - ▶ Copy the D:\SAGE\V1\DbArchive_tables.ini you got from SAGESERVERA into the D:\SAGE\V1\DbArchive dir
 - ▶ Rename it to tables.ini
 - ▶ Open a CMD prompt as an administrative user, cd to the D:\SAGE\V1\DbArchive dir and enter the following command (*NOTE: Do not copy and paste it from here, type it in*):
 - ▶ If SQL
DbCSArchiveServerSQL.exe -debug 31417@any D:\SAGE\V1\DbArchive\dbarchive.ini
 - ▶ If Oracle
DbCSArchiveServerOracle.exe -debug 31417@any D:\SAGE\V1\DbArchive\dbarchive.ini
 - ▶ Press enter
 - ▶ When the command has completed, close the CMD prompt.
 - ▶ Re-instate the V1_SETTINGS.def from D:\SAGE\V1\DbArchive.STANDARD in to the D:\SAGE\V1\DbArchive dir
 - ▶ Open services.msc and start both the 'DbArchive*' services

11. PIA / SOA – Restoring bespoke changes on SAGESERVERB

If bespoke changes have been made on SAGESERVERA beyond the standard, they must be re-instated on SAGESERVERB.

The installation procedure on SAGESERVERB will have installed the standard solution, this needs to be essentially overwritten with the bespoke changes already working on SAGESERVERA.

- ▶ Take a copy of D:\SAGE\V1\DbCapture\defs from SAGESERVERA
- ▶ Take a copy of D:\SAGE\V1\DbCapture\DbCapture\Profile from SAGESERVERA
- ▶ Take a copy of D:\SAGE\V1\DbCapture\DbCapture\Template from SAGESERVERA
- ▶ Take a copy of D:\SAGE\V1\DbCapture\DbCapture\Queue from SAGESERVERA
- ▶ On SAGESERVERB:
 - ▶ Open services.msc and stop all the 'DbCapture*' services
 - ▶ Take a backup of the D:\SAGE\V1\DbCapture\defs directory
D:\SAGE\V1\DbCapture\defs.STANDARD
 - ▶ Take a backup of the D:\SAGE\V1\DbCapture\Profile directory
D:\SAGE\V1\DbCapture\Profile.STANDARD
 - ▶ Take a backup of the D:\SAGE\V1\DbCapture\Template directory
D:\SAGE\V1\DbCapture\Template.STANDARD
 - ▶ Take a backup of the D:\SAGE\V1\DbCapture\Queue directory
D:\SAGE\V1\DbCapture\Queue.STANDARD
 - ▶ Copy in to the D:\SAGE\V1\DbCapture the directories you copied from SAGESERVERA
 - ▶ Open a CMD prompt as an administrative user, cd to the D:\SAGE\V1\DbCapComms dir and enter the following command (*NOTE: Do not copy and paste it from here, type it in*):

DbCapComms.exe -debug 31499@any -queueupdate

- ▶ Press enter
- ▶ When the command has completed, press CTRL+C and close the CMD prompt.
- ▶ Re-instate the OCR_V1_SETTINGS.def from
D:\SAGE\V1\DbCapture\defs.STANDARD\OCR_V1_SETTINGS.def in to the
D:\SAGE\V1\DbCapture\defs dir
- ▶ Open services.msc and start all the 'DbCapture*' services