

datel

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world of sage

► **Copying Live to Test -
V12**
Sage X3 Help Sheet



1. Prerequisites

Free Space

It can be difficult at times to estimate the size of a specific X3 schema as all folders can be a part of a single database file, we can get a rough figure for this using a 'Size by Schema' SQL query.

If there isn't free space on the drive to accommodate the SVG, you will need to either clear down some temp/working files or ask to have space added to the drive to accommodate.

SQL Backups

You will also want to check on the time that SQL backups are ran and how long they take to complete, this will allow you to schedule the SVG to run after these have completed to avoid issues.

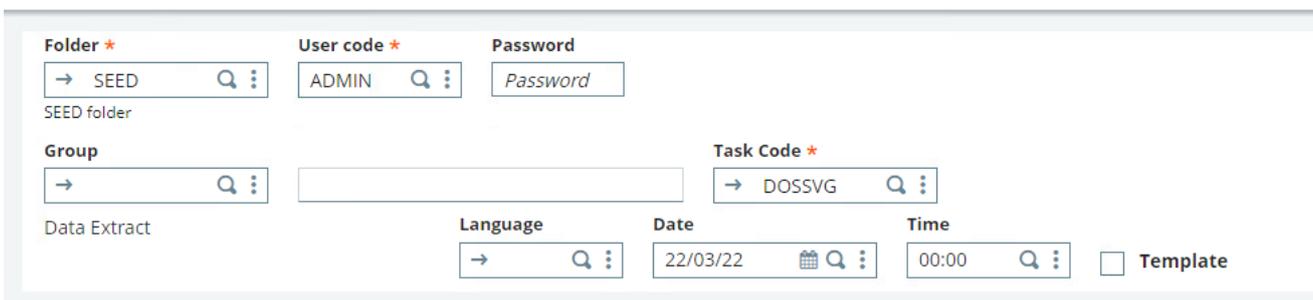
2. Scheduling the SVG

You will first need to schedule the extract of LIVE data to be imported into TEST.

Note: the folders displayed in the screenshots will always be SEED, as this document was created using a baseline test system. Please ensure that you have your folder names correct and take care in reading the document.

- ▶ Log into the LIVE folder and navigate to: Usage > Batch Server > Request submission and configure your SVG task as below (Ensure that the folder is set to the LIVE folder):

Query submission ?



The screenshot shows a web form for submitting a query. The fields are as follows:

- Folder ***: A dropdown menu with 'SEED' selected. Below it, the text 'SEED folder' is visible.
- User code ***: A text input field containing 'ADMIN'.
- Password**: A text input field containing 'Password'.
- Group**: A dropdown menu with an empty selection.
- Task Code ***: A dropdown menu with 'DOSSVG' selected.
- Language**: A dropdown menu with an empty selection.
- Date**: A date input field containing '22/03/22'.
- Time**: A time input field containing '00:00'.
- Template**: A checkbox that is currently unchecked.

This task should be scheduled to run during the night and as mentioned previously, preferably outside of the time that backup tasks are running on the server.

- ▶ Once you are happy with your task, select 'Validation'.

You will then be presented with the parameter entry screen for the data Extract.

Data Extract ?

Folder SEED Q :	<input type="checkbox"/> Archived	Tables to Export * Q :	Backup volume SVG Q :
<input checked="" type="checkbox"/> Copy configuration files		<input type="checkbox"/> Real size in srf	

- Select the folder that you would like to extract (LIVE), leave the ‘*’ in the ‘tables to export’ field and leave the backup volume as ‘SVG’ then select OK and your task will be submitted to the batch server.

You can check to make sure that the task has submitted correctly by checking the batch sever, the task will commonly be displayed at the top of the table of tasks as it is scheduled for the future:

Requests

	Number	Folder	Task Code	Lan...	User	Date	Time	One User	Status
1	95	SEED	DOSSVG		ADMIN	14/11/18	00:01	No	Standby

Once the task has completed the data will be input into the following directory:

C:\Sage\X3APP\folders\SEED\SVG

Note: there must be a directory with the same name as the ‘Backup Volume’ for the task to run.

3. Importing the SVG into the Test folder.

Assuming that you will be overwriting an existing test folder you will need to rename the physical files for the test folder to reuse the same name. Before you do this you will want to log into the existing test folder and stop the accounting tasks.

This will require you to change the name of the following directories:

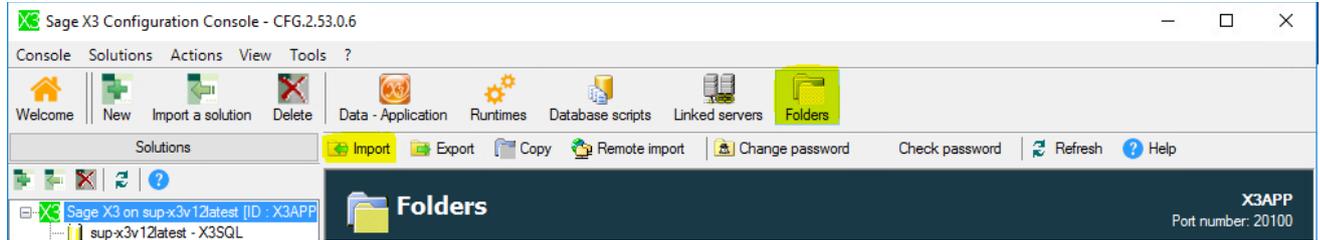
C:\Sage\X3APP\folders\TEST
C:\Sage\X3APP\folders\X3_PUB\TEST

To:

C:\Sage\X3APP\folders\TEST_OLD
C:\Sage\X3APP\folders\X3_PUB\TEST_OLD

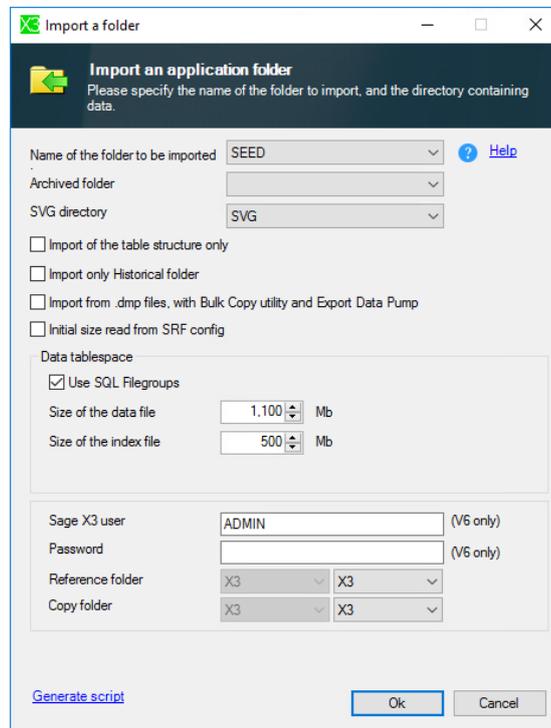
Once this is complete, you will need to copy the live folder in both the ‘Folders’ and ‘X3_PUB’ directories and rename them to ‘TEST’. This allows us to overwrite the existing test folder with live data which is the most space efficient way to do this.

Following this we can open the X3 management console, select the solution, then 'folders' followed by 'import':

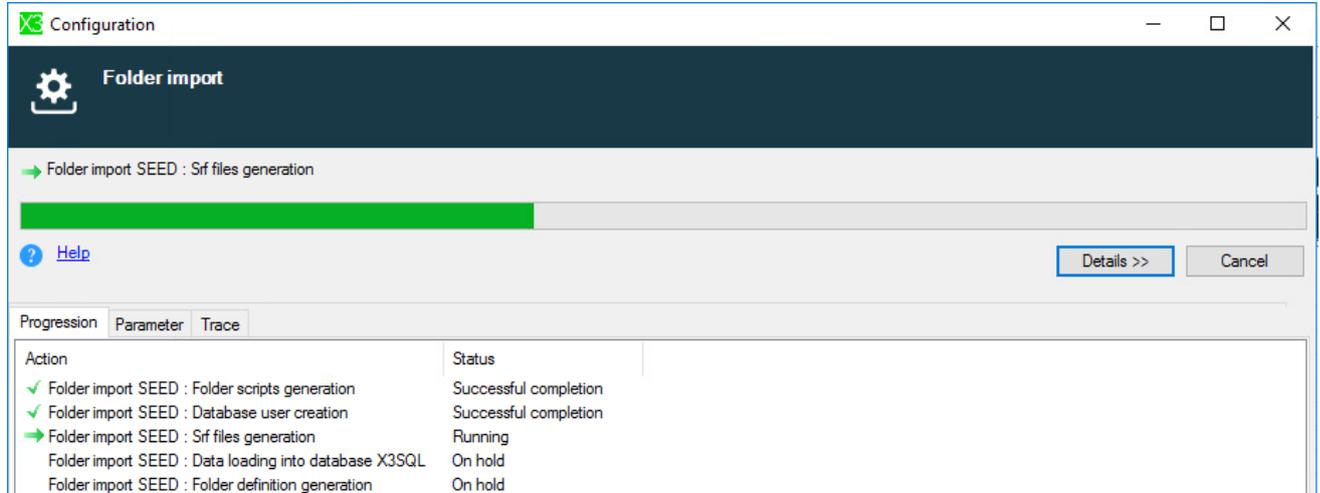


Configure the import task as shown below, the only thing that will need to be changed here is the 'name of the folder to be imported' this should be the test folder but as we're doing this on a demo system it will show as 'SEED' in the screenshots:

NOTE: Once this process has been started it will begin to overwrite data and reverting to a backup will be the only way to return to where you were, so please be sure that you DO NOT have the LIVE folder selected.



Clicking 'OK' will start the import process this will just need to be monitored until complete:



Once this has completed you can log back into X3 and enter the Test folder and ensure that everything is ok by accessing a couple of functions.

4. Post Import Checks

After your Import has completed and you've confirmed that the folder is working as it should be you still have a few checks that will need to be completed before you can hand this back off to the users.

Parameters

There are two parameters that will need to be blanked out to ensure that the new test folder isn't trying to speak with the live instance of V1 after the folder copy has been completed. You can get to these via:

Parameters > General Parameters > Parameter Values

The parameters that will need to be cleared are:

- ▶ ADX > EDM > XV1EDMWSP
- ▶ SUP > WRK > SERMES

AccountingTasks

As a final step, you will need to delete the accounting task in the new test folder and re-create it as this will be referencing the task that's likely still running in live. You can do this in the following function:

Parameters > Financials > Accounting Interface > Accounting Tasks

► From here, click on the line and then the delete button:

The screenshot shows a table titled 'Accounting tasks' with columns: Task, Recurring t..., Description, and Criteria. The first row contains 'ACCENTRY01', 'WACCC9E553', and 'SEED ACCENTRY01'. The right sidebar has a menu with 'UTILITIES', 'BROWSING', 'Printouts', 'HELP', and 'DIAGNOSIS...'. A yellow trash can icon is highlighted next to 'BROWSING'.

Once this has been completed you can just click back into the line and another entry will be created. All you will need to check here is that the 'number of records' has been set to what it was previously. Now that this has been created it should reference a new 'Recurring task' as shown below:

The screenshot shows the same table as above, but the 'Recurring t...' column for the first row now contains 'WACC01EDB3'. The right sidebar menu is partially visible, showing 'Change the key...', 'Links', 'Properties...', 'Send to...', 'Converter', and 'BROWSING'.

You should also be able to see this task referenced in: Usage > Batch Server > Accounting Task

The screenshot shows a window titled 'Journal Status Monitor' with buttons for 'Active', 'Deactivate', and 'Refresh'. Below is a table with columns: Task, Recurring t..., and Recurring task status. The first row contains 'ACCENTRY01', 'WACC01EDB3', and 'Active'. The right sidebar has a menu with 'Parameters', 'UTILITIES', 'BROWSING', 'Printouts', 'HELP', and 'DIAGNOSIS...'.

5. Completion

Now that the folder import has been completed and you're ready to finish up here, you will need to clear down any files that may be left over from this work.

Files to be cleared down:

- ▶ Any TEST_OLD folders that were created in the process of setting up the new folder.
- ▶ Any SVG data left over in the LIVE or new TEST folders

You will also want to liaise with your internal SQL DBA and have them check on the TempDB and transaction log to ensure that these haven't grown to a size that will cause issues.