Sage Pro ERP

HOW TO: Migrate Accounting Data Between SQL Servers

Introduction

Sage Pro is available with a Microsoft SQL Server 2000 (SQL Server) database. At times, it may become necessary to move the accounting data between two separate SQL Servers.

Purpose

This document is meant to assist Sage Pro Business Partners and Certified Consultants when moving accounting data between SQL Servers. It is meant as a guide and is not intended for redistribution.

Scope

The steps listed in this paper, apply to all versions of Sage Pro running with SQL Server, unless otherwise noted.

Important

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Contents

Preparation

Review the following section carefully before proceeding with moving the accounting data.

Precautions Before Moving Data

Before proceeding, address the following points:

- There is an existing Sage Pro installation with a SQL database.

- The new server does not have any existing Sage Pro databases.

- The technician has System Administrator level access to both systems.

- There are no common Sage Pro logins between the two systems.

- Backup all data and program files before proceeding.

Warning
Please refer to Sage Pro Knowledgebase article 21291 for more information regarding Microsoft SQL collation methods with Sage Pro. Sage Pro requires very specific collation methods in order to operate correctly. Please review this article before proceeding.

Other Resources

A number of Microsoft Knowledge Base articles were used in the creation of this paper. Review each one before proceeding:

- Article 314546 - "HOW TO: Move Databases Between Computers That Are Running SQL Server"
  http://support.microsoft.com/?id=314546

- Article 246133 – "HOW TO: Transfer Logins and Passwords Between Instances of SQL Server"
  http://support.microsoft.com/?id=246133

- Article 224071 – "Moving SQL Server databases to a new location with Detach/Attach"
  http://support.microsoft.com/?id=224071

- Article 274188 – "PRB: 'Troubleshooting Orphaned Users' Topic in Books Online is Incomplete"
  http://support.microsoft.com/kb/274188

Moving SQL Data

The following section describes two possible methods to move Sage Pro accounting data from one SQL Server to another.

Warning
This process is complex and involved and should only be undertaken by a qualified Microsoft SQL Server DBA and is not supported by Sage Customer Support. Please ensure there is a complete and verified backup before proceeding.

Backup and Restore Method

1. Login to the original server (A) with full system access.

2. Create and run the **sp_help_revlogin** stored procedure from Microsoft Knowledge Base Article 246133.

3. Review the logins and remove any that are not to be copied to the new server.

4. Save the results to a .SQL format file.

5. Execute this saved script on the new server (B).

6. Open SQL Enterprise Manager on server B.

7. On server B, create databases with the same names as the Sage Pro databases on server A.

8. Create a backup copy of all Sage Pro system, temporary and backup databases on server A.

9. Copy the backup files to server B.

10. On server B, restore the Sage Pro databases to the newly created databases.

11. Open the Pro.ini file from the Sage Pro root directory.

12. Change the server name value from server A to server B.

13. Change the Data Source Name (DSN) name to a new and unique value.

14. Run the **sp_change_users_login** report command to detect any orphaned users in each Sage Pro database.

Related Reading
Please refer to Microsoft Knowledge Base article 274188 for more information regarding orphaned users.

Detach and Reattach Method

1. Login to server A with full administrative privileges.

2. Create and run the **sp_help_revlogin** stored procedure from Microsoft Knowledge Base article 246133.

3. Review the logins and delete any that are not to be copied to the new server.

4. Save the results to a .SQL format file.

5. On server B, run the script saved from the previous step.

6. Detach the Sage Pro system, temporary and company databases. This can be done via Enterprise Manager or in Query Analyzer, as described below:

   a. In Query Analyzer, run the following query:

   ```
   EXEC sp_detach_db '[database]','FALSE'
   ```

   *where [database] refers to the database being detached

   b. In Enterprise Manager, right-click the appropriate database, point-to **All Tasks** and click **Detach Database**. The Detach Database screen appears as below:
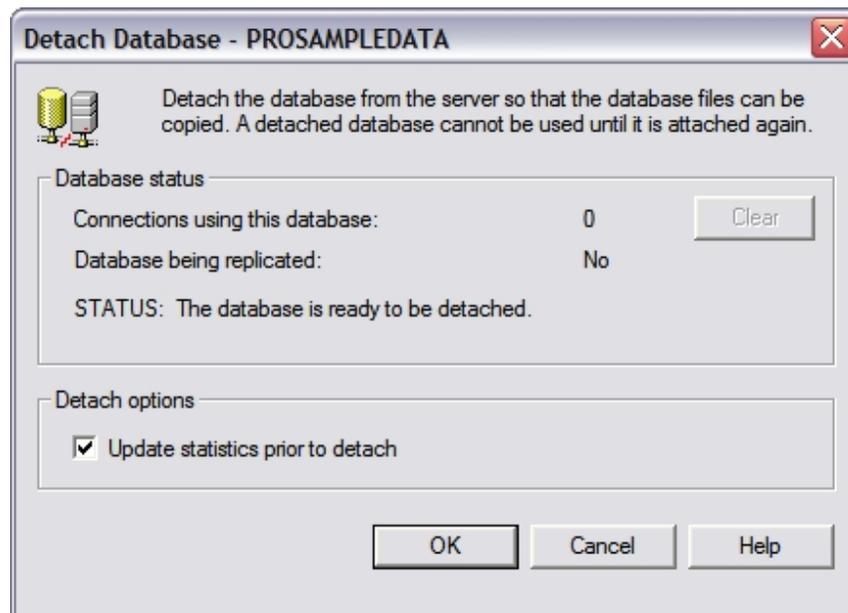

Figure 1: Detach Database Options Dialog Box

7. Select **Update statistics prior to detach** and click **OK**.

8. Copy the .MDF and .LDF format files to server B.

9. The databases can be attached via either Query Analyzer or Enterprise Manager, as described below:

a. In Query Analyzer, run the following query:

```
EXEC sp_attach_db @dbname = N'[database].',
@filename1 = N'c:\ MSSQL\Data\[database].mdf',
@filename2 = N'c:\ MSSQL\Data\[database]_log.ldf'
```

b. In Enterprise Manager, right click the **Databases** folder, point-to **All Tasks** and click **Attach Database**. The Attach Database screen appears as below:
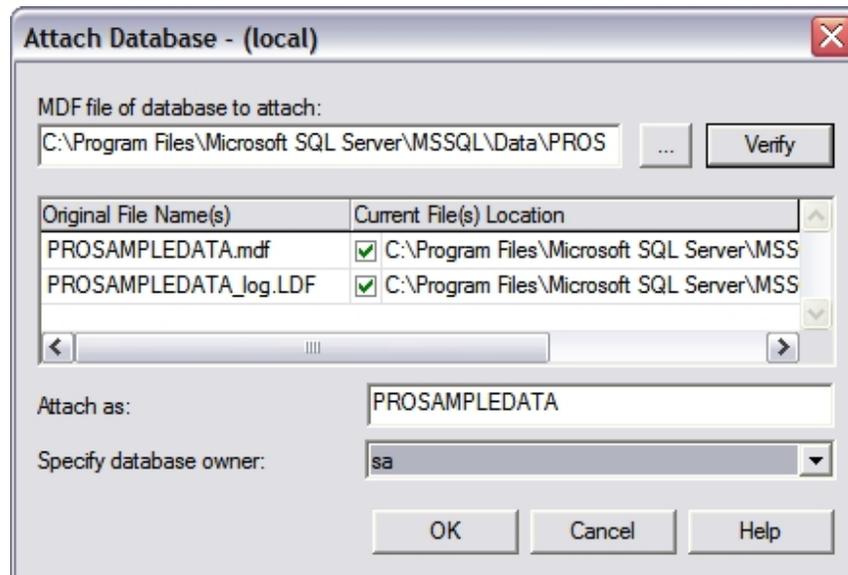

Figure 2: Attach Database Options Screen

10. Run the **sp_change_users_login** report command to detect any orphaned users in each Sage Pro database.

Related Reading
Please refer to Microsoft Knowledge Base article 274188 for more information regarding orphaned users.

11. Open the Pro.ini file from the Sage Pro root directory.

12. Change the server name value from server A to server B.

13. Change the DSN name to a new and unique value.

14. Add the server roles for Sage Pro administrative users.

15. Since this is a new server, server roles must be added for Sage Pro administrative users (e.g. ADMN). This can be done via Query Analyzer or Enterprise Manager, as described below:

a. In Query Analyzer, run the following query:

```
USE master
GO
```

```
EXEC sp_addsrvrolemember'AIADMN',
'securityadmin'
GO
EXEC sp_addsrvrolemember 'AIADMN','diskadmin'
GO
EXEC sp_addsrvrolemember 'AIADMN','dbcreator'
GO
```

    b. In Enterprise Manager, follow the steps below:

        i. Click the **Server** tab and **Security** folder.

       ii. Click **Logins**.

     iii. Right-click the **AIADMN** login and click **Properties.**

     iv. Click **Server Roles**.

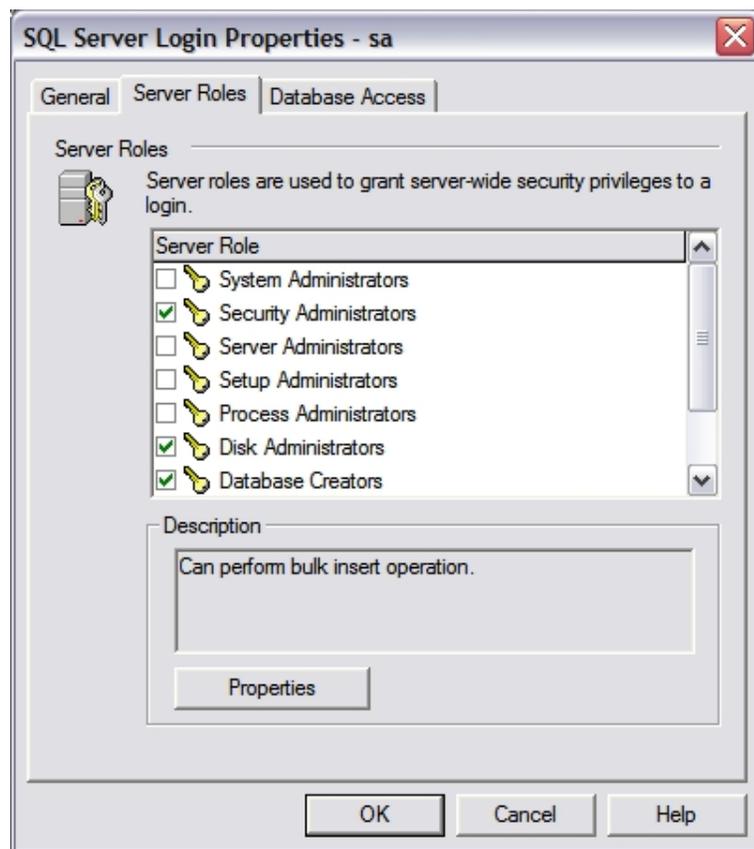   v. Select **Security Administrator**, **Disk Administrator** and **Database Creator** as in the image below:

Figure 3: Server Roles for Administrative Users

     vi. Click **Ok** and exit SQL Enterprise Manager.

Important
These roles are required for the AIADMN user in SQL Server which corresponds to the ADMN user in Sage Pro.

Once the move has been completed, login to Sage Pro to confirm that database connection is active. Sample transactions may also be attempted in company 99 to verify that the tables and databases are being updated correctly.