

Advanced Intercompany Transactions (AIT) Migration Technical Bulletin

If you are migrating Great Plains from Pervasive SQL to Microsoft SQL Server, read these instructions carefully. Also, alert *mc*² at least two weeks in advance about the scheduled migration date, so that you can make sure some one is aware of your plans and accommodate your schedule.

PLEASE NOTE THAT YOU CANNOT MIGRATE 8.0 or 9.0 DATA. YOU MUST UPDATE TO 7.5 PERVASIVE AND THEN MIGRATE 7.5 DATA FROM PERVASIVE TO SQL. NO OTHER TYPES OF MIGRATIONS WILL BE SUPPORTED.

Except as noted below or instructed by tech support, do not run any maintenance for AIT tables.

Basic Steps:

1. Update the current installation to version 7.5 of both Great Plains and AIT. Make sure to install the latest Runtime engine components and any service packs. Read the instructions in the AIT manual and the Technical Bulletin that is included in the download of the latest program update for Installation and Update instructions.
2. If there are any "Test" companies that you are not going to update or migrate remove them (first from within Great Plains: Setup/System/Company/Delete; then remove the data directory). After you've done this, run check links only on the AIT Company Setup table.
3. Migrate all of your Great Plains data, and update any reports and forms before attempting to migrate the AIT data. In ALL companies, use the Rebuild Tables window to verify that all tables have been updated by inserting all of them into the right-hand list box. You do not need to rebuild tables again, but inserting them into the list box will force an error condition if any table did not update properly.
4. If TWO, Inc. is installed, make sure to re-install it in ALL installations (i.e. both the Great Plains you are migrating FROM, and the Great Plains you are migrating TO, or simply delete that company).
5. Run the AIT Setup Wizard in the new Great Plains system once BEFORE attempting the AIT migration, as if it were a new installation, choosing the desired options except the Migration option. The options you choose may vary based on how you manage security. At a minimum, mark Install Posting, Build AIT Tables, and Install SQL Objects. For more information on installing AIT for the first time, refer to the installation section of the manual.
6. If you are migrating from Pervasive.SQL to MSSQL Server, you must edit the DEX.INI file in your MSSQL Server program directory so that the Pervasive.SQL requester loads. Put a semi-colon (;) in from of the BTInterface=NoLoad line, or

- else you will not be able to access the old Pervasive data and will get an error when you begin the migration (“...database operation not supported...”).
7. The AIT uses a “pull” migration, run as part of the mc² Setup Wizard from inside a SQL client installation. This client installation must be able to access BOTH the SQL and the Pervasive databases. This means that the P.SQL client installation must also exist on this workstation. Because the GPS migration process has you rename the root Great Plains data directory, you may have pathname translation problems when attempting to access the old data. To resolve this problem, change the default location translation. Adding a new location translation will not work. If you continue to get errors with the existing pathnames table, you can use the FIXPATH program to edit the Pathname table of the old data (www.mc2software.net/downloads/files/fixpath.exe). In order for the migration to succeed, you may need to also edit the Pathnames Translation table to make sure the "Translate From" and "Translate To" are the same.

Read the instructions that come with the FIXPATH program **CAREFULLY**. If you get a "Path Not Found" (ctree) or “Bad File Name” (Pervasive) error when starting the migration, it is due to a problem with the path to the old data.

Note on error 35: This error usually means that the directory does not exist. Sometime you will get this error as “bad file name” because the Dexterity Runtime will attempt to create a table that it cannot find. If the directory is missing, Dexterity will attempt to create a file with “\” in the file name, and this is not allowed in the Windows OS (thus the “bad file name” error).

Note on Location Translation: The AIT Migration tool will be able to handle location translation only if the WINDOWS translation ID is valid from the workstation on which you are performing the migration. By default, a SQL installation will have a location translation ID WINDOWS. This is not used by SQL, but is still set as a value on the client installation. The AIT migration has to use this translation to translate the location of the Pervasive data. If you have more than one Location Translation, make sure that the WINDOWS translation is valid.

8. After the migration has finished, exit Great Plains. When you log back into the new Great Plains, run Check Links on all AIT tables.
9. Check your AIT Setup window. The AIT Setup table is NOT migrated: it is initialized during the original new data install.
10. Update to 8.0.

If you are migrating from a Great Plains system where the Company ID* begins with a number, you will have to change the ID when migrating to SQL Server, because SQL Server does not allow a database object to begin with a numeric. AIT allows you to migrate all companies at one time, rather than one-at-a-time. Because of this, AIT needs a way to easily map the old companies to the new companies, so that you don't have to manually

input path information for each company. Instead, you need to map the Pervasive Company ID to the SQL Company ID (database name). By renaming these companies, AIT is able to assume a one-to-one mapping based on the Company ID.

In order to successfully migrate these companies, follow these directions, after doing a complete backup:

1. In your Pervasive Great Plains system, create a new company where the Company ID begins with a letter (e.g. C1001). The company name cannot be the same, but this is ignored by the AIT migration process.
2. Log out of Great Plains
3. Rename the new company data folders to a temporary name (e.g. from \C1001 to \T1001).
4. Rename the old, numerical company folder to the new company data folder name (e.g. from \1001 to \C1001).
5. Rename the temp company data folder to the name of the original numeric folder (e.g. from \T1001 to \1001).
6. Log back into Great Plains and delete the original numeric company
7. Delete the \1001 company data folder.

This process will redirect Great Plains to look at new company folders. You will need to do this process for every numeric company.

After you have completed the migration, following the Basic Steps on page 1, you will need to run a series of sql scripts against ALL company databases to update the Company ID column in all AIT tables. The file containing these scripts (updatemigrate.sql) is installed in the \Great Plains\mc2\sql directory when you choose a Server installation. You will need to run this script in ALL database for each of the renamed companies.

*The field name Company ID is used for the purposes of clarity. The field description that appears on most windows and report is Company ID, however the actual field name is Intercompany ID, and the column name is INTERID.

Error Messages:

If you get any Dexterity error messages not mentioned above, please use the Dexterity documentation and lookup the meaning under the err() function.

If you get any Pervasive error messages, go to www.pervasive.com and put the error number in the search field.