



Sage 300

Ops Inquiry and Sales Analysis Database Conversion Guide

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Introduction

Beginning in Sage 300 2016, only databases in Microsoft SQL Server format are supported. If you are upgrading from a previous version of Sage 300 and you have Ops Inquiry or Sales Analysis databases in Pervasive format, follow the steps in this guide to convert your databases to Microsoft SQL Server format.

Note: You must convert your databases before installing your new version of Sage 300.

System requirements

To complete the steps in this guide, you must have:

- Pervasive PSQL Client or Server
- MS SQL Server 2008 or later
- SQL scripts provided by Sage:
 - ActivateData.sql
 - DisableIndexes.sql
 - EnableIndexes.sql

Converting databases to Microsoft SQL Server format

Follow the procedures in this section to convert a database from Pervasive format to Microsoft SQL Server format.

Note: Some steps in this section assume knowledge of database management tools (such as SQL Server Management Studio and Pervasive Control Center). For detailed information about using these tools, see their documentation.

Step 1: Activate Ops Inquiry and/or Sales Analysis

1. Open SQL Server Management Studio as a user with sysadmin privileges.
2. Open your company database and then run the ActivateData.sql script.
3. In Sage 300, open the Data Activation screen in Administrative Services. Activate Ops Inquiry and/or Sales Analysis.

Step 2: Set up a new Microsoft SQL Server database

1. In SQL Server Management Studio, create a new database using the following naming pattern:

<the SQL database name for your company database>UNI

For example, if your company database is named SAMLTD and the SQL database name assigned to it is SAMLTD1, the new database would be SAMLTD1UNI.

Important! This database must use the same collation method as your other Sage 300 SQL databases (System and Company).

2. Open your new database and then run the DisableIndexes.sql script.

Step 3: Set up access to your Pervasive database

You can set up access to your Pervasive database in either of the following ways:

- Set up a database in Pervasive Control Center.
- Set up a data source using ODBC Data Source Administrator.

Tip: You can identify your Ops Inquiry and Sales Analysis database because it is located in a folder named UNI, which is in the folder where your company database is located. For example, if your company database is located in \\Server\Share\SAMLTD, your Ops Inquiry and Sales Analysis database would be located in \\Server\Share\SAMLTD\UNI.

To set up a database in Pervasive Control Center:

1. In Pervasive Control Center, create a new database.

Note: You are not actually creating a new database. Rather, you are creating a profile to access your existing database.

2. On the Create New Database screen, specify the database name and location for your existing UNI Pervasive database.
3. Click **Finish**.

To set up a data source using ODBC Data Source Administrator:

1. Open the 32-bit ODBC Data Source Administrator.
Important! Do not use the 64-bit ODBC Data Source Administrator.

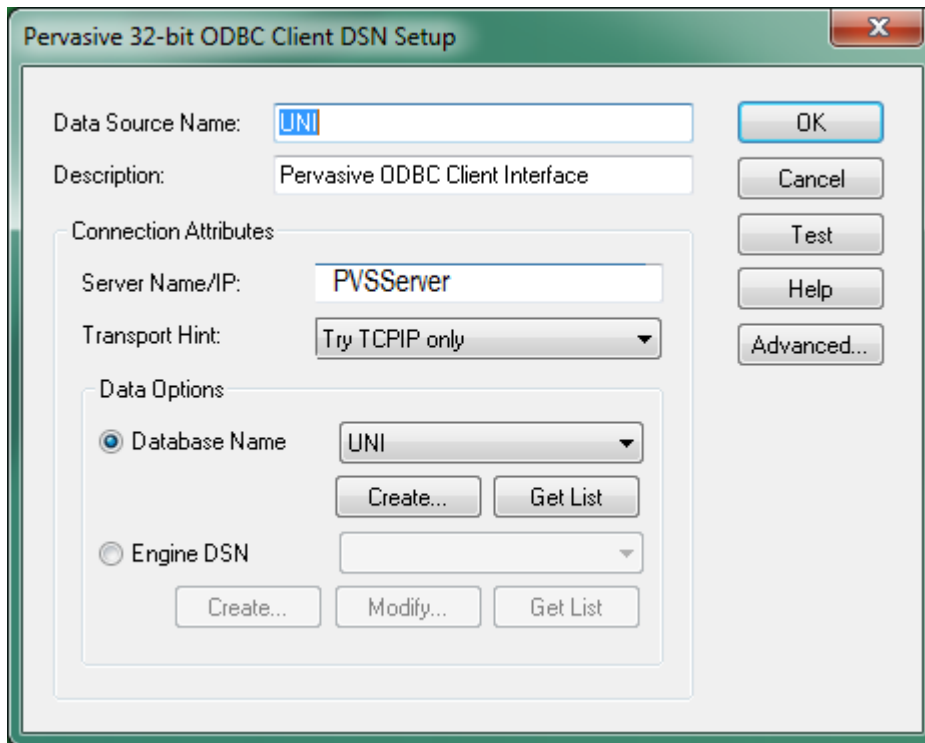
2. On the System DSN tab, click **Add**.
The Create New Data Source screen appears.

3. On the list of drivers, select **Pervasive ODBC Client Interface**.

Note: If **Pervasive ODBC Client Interface** does not appear on the list of drivers, ensure that you have Pervasive PSQL Server or Pervasive PSQL Client installed on the same system as Microsoft SQL Server.

4. Click **Finish**.

The Pervasive 32-bit ODBC Client DSN Setup screen appears.



5. Enter the data source name and server name/IP for your Pervasive database.
6. In the **Transport Hint** field, enter **Try TCPIP only**.
7. In the **Data Options** group, select **Database Name**, and then click **Get List**. On the list that appears, select your Pervasive database.

Note: If your Pervasive database does not appear on the list, click **Create** to add it. (You must specify the database name and location for your existing Pervasive database.)

8. Click **OK**.

Step 4: Copy data from your Pervasive database to your Microsoft SQL Server database

1. In SQL Server Management Studio, right-click your Microsoft SQL Server database, and then click **Tasks > Import Data**.

The SQL Server Import and Export Wizard appears.

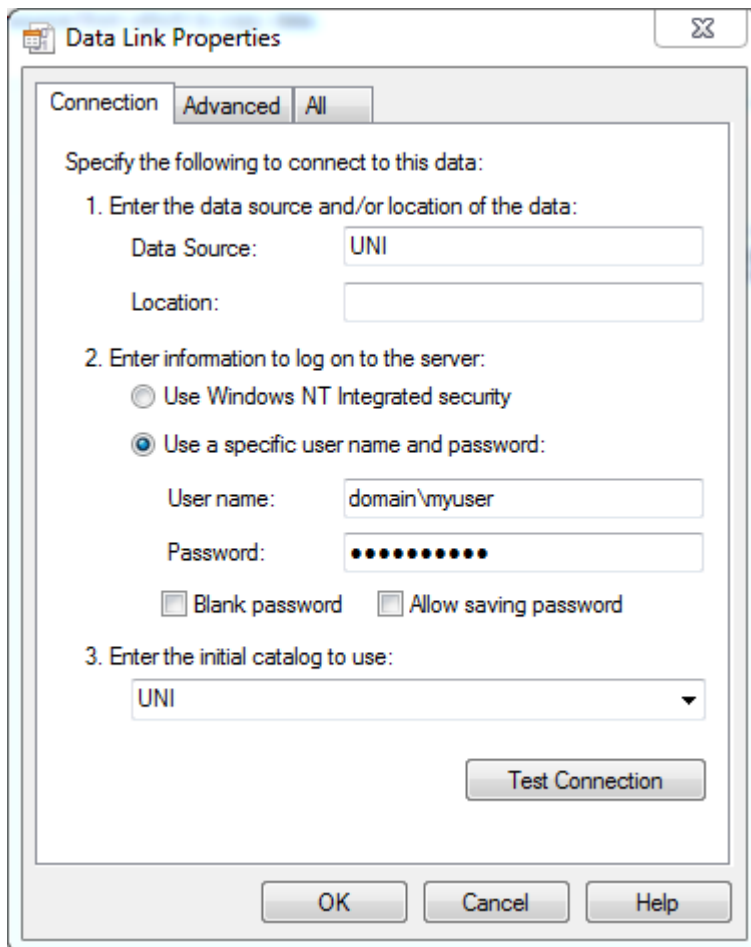
2. Click **Next**.

The Choose a Data Source screen appears.

3. In the **Data source** field, specify **Pervasive PSQL OLE DB Provider**, and then click **Properties**.

The Data Link Properties screen appears.

4. Enter connection information for your Pervasive database, click **Test Connection** to check that the connection is working, and then click **OK**.



The screenshot shows the 'Data Link Properties' dialog box with the 'Connection' tab selected. The dialog is titled 'Data Link Properties' and has a close button in the top right corner. Below the title bar, there are three tabs: 'Connection', 'Advanced', and 'All'. The 'Connection' tab is active. The main area contains the following text and controls:

Specify the following to connect to this data:

1. Enter the data source and/or location of the data:
Data Source: UNI
Location: (empty field)
2. Enter information to log on to the server:
 Use Windows NT Integrated security
 Use a specific user name and password:
User name: domain\myuser
Password: (masked with dots)
 Blank password Allow saving password
3. Enter the initial catalog to use:
UNI (dropdown menu)

At the bottom of the dialog, there is a 'Test Connection' button and three standard buttons: 'OK', 'Cancel', and 'Help'.

5. On the Choose a Data Source screen, click **Next**.

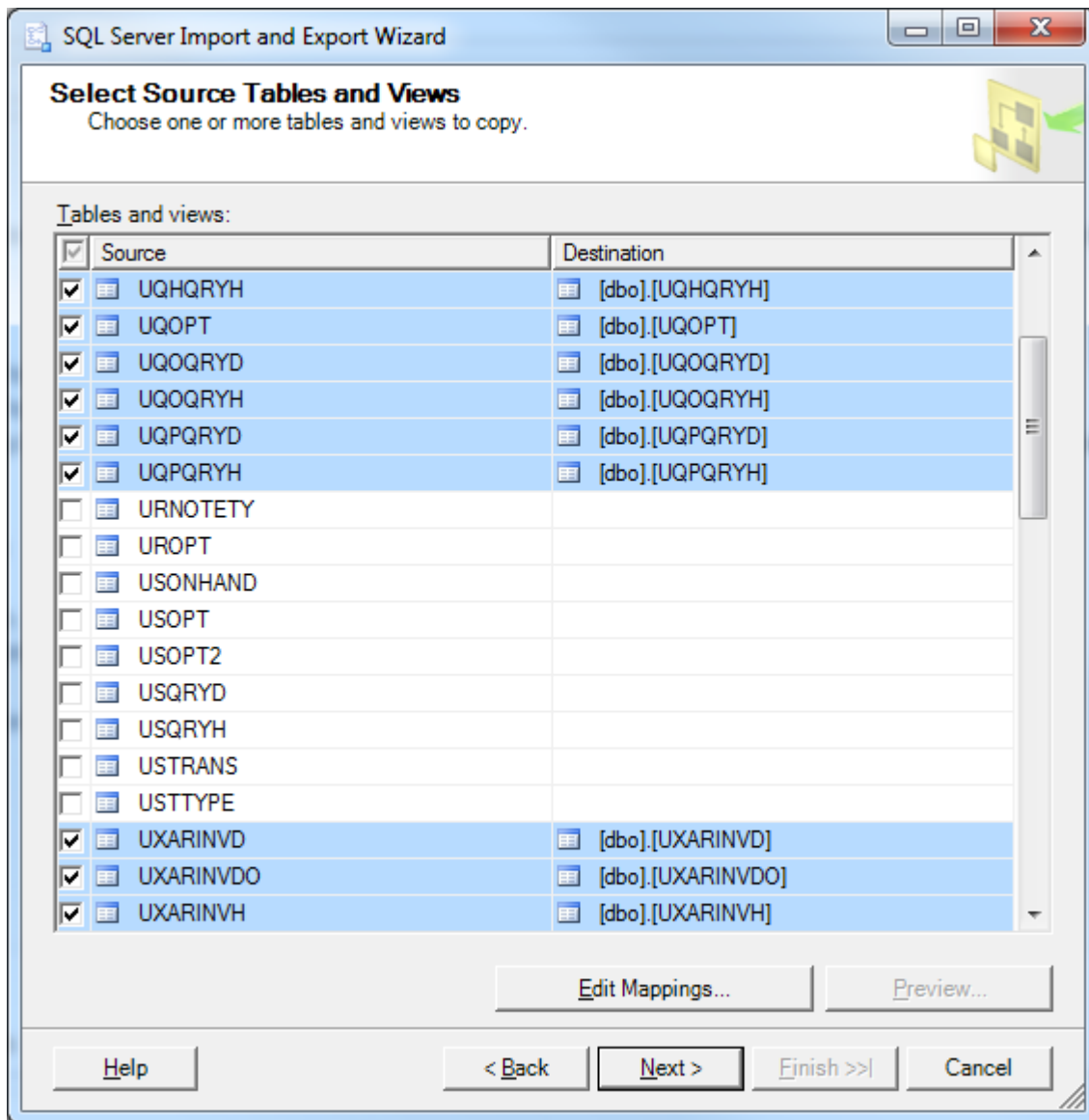
The Choose a Destination screen appears.

6. Enter database information for your Microsoft SQL Server database, and then click **Next**.

The Specify Table Copy or Query screen appears.

7. Select the **Copy data from one or more tables or views** option, and then click **Next**.
The Select Source Tables and Views screen appears.
8. Select and then highlight all Ops Inquiry and Sales Analysis tables (tables beginning with UQ or UX), as follows:
 - a. For each table, check the checkbox.
 - b. While pressing **Ctrl**, click on each selected table so that all selected tables are highlighted.

Important! When highlighting tables, make sure you do not click the checkbox, because doing this clears the checkbox.



9. Click **Edit Mappings**.
The Transfer Settings screen appears.
10. Select the **Enable identity insert** option, and then click **OK**.

11. On the Select Source Tables and Views screen, click **Next**.
The Convert Types Without Conversion Checking screen appears.
12. Confirm that the information on the Convert Types Without Conversion Checking screen is correct, and then click **Next**.
The Save and Run Package screen appears.
13. Select the **Run immediately** and **Save SSIS Package** options. For the **Save SSIS Package** option, confirm that **SQL Server** is selected, and then click **Next**.
The Save SSIS Package screen appears.
14. On the Save SSIS Package screen, click **Next**.
The Complete the Wizard screen appears.
15. Click **Finish**.
Data from your Pervasive database is copied to your Microsoft SQL Server database.
16. When copying is complete, check that all data was successfully copied, and then click **Close**.
17. On the main SQL Server Management Studio screen, run the EnableIndexes.sql script.
Note: If you copied your data on a test SQL Server environment instead of your production SQL Server environment, you must create a full SQL backup of your new SQL database and then restore from this backup to your production SQL Server environment.
18. In Sage 300, confirm that Ops Inquiry and Sales Analysis screens are visible and working.

Step 5 (optional): Set up a pictures directory in Ops Inquiry

If you stored pictures in your Pervasive database and you want to continue using those pictures with your new Microsoft SQL Server database, set up a pictures directory in Ops Inquiry, as follows:

1. In Sage 300, open **Ops Inquiry > Setup**.
2. Select the **Store pictures at** option, and then specify the directory where your pictures are stored (for example, C:\Program Files (x86)\Sage\Sage 300 ERP\SAMPLE\SAMLTD).
3. Click **Save**.