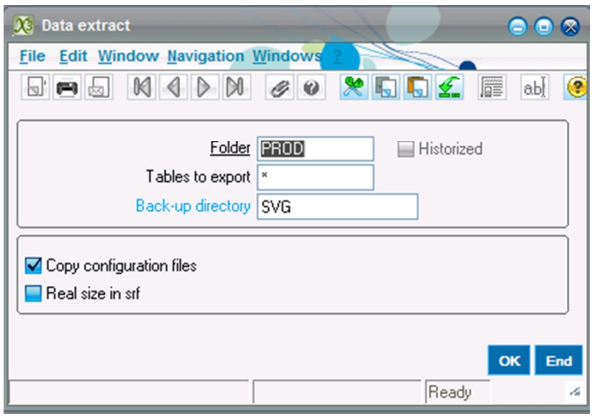
Maintaining a Pilot System in Sage ERP X3

The value of a Pilot System cannot be overemphasized. It is the sandbox that allows users to try new skills without endangering your data. A pilot system is also a place where you can test updates, new reports or customizations before rolling these changes out to everyone. However, for a Pilot System to be of value, it must be updated from time to time from your live system. Performing such an update will not only refresh the data in the Pilot System, but it will also allow you to synchronize your parameters and customizations.

In the typical X3 installation, there are 3 folders: Demo, Pilot and Live. The folders are setup with the concept of inheritance, which basically means that data and settings flow from the Demo folder to the Pilot folder when the Pilot folder is created. Then when you create the Live folder, the data and settings in the Pilot folder flow to the Live folder. The problem is that if you make changes in the Live system, there is no single button that you can press which will resynchronize these changes back to the Pilot system.

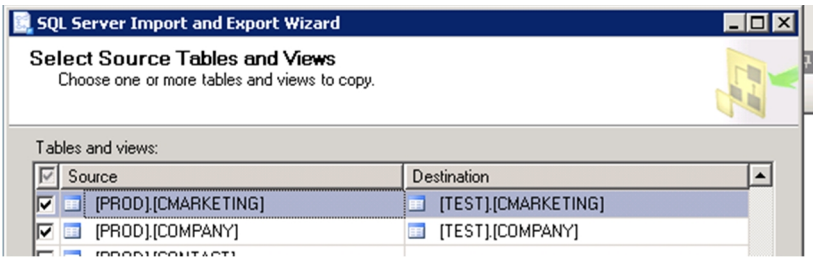
Refreshing Data on a Pilot System

So, how do you update date a Pilot System from the Production System? The correct answer depends upon your goal. One option built into Sage ERP X3 is called Data Extraction task (Development>Utilities>Extraction/Integration>Data Extract). This task can be used to export all data in the Live folder to a temporary location. This data can then be restored into the Pilot folder using the Data Integration task (Development>Utilities>Extraction/Integration>Data Integration). This option can be slow, depending upon the amount of data in your system. When running the Extraction and Integration, every table in your system is copied.



If you are using SQL Server, another option is to use the SQL Server Import/Export feature. An advantage of using this method is that it is quicker. Also, it allows you to choose which tables

or records to copy, in the case where you need finer control of what data is copied. When using this feature, the source AND destination database will be the same (i.e. x3v6). You would then select the source tables from [PROD] (or [LIVE]) and the destination tables as [PILOT] (or [TEST]). This may take some time to setup the first time, but once created it can be saved as a SSIS package and re-used for future updates.



Another Test System Option

Another option for creating a test system would be to copy the Live folder and create a new folder that inherits from the Live folder. The benefit of this approach is that when you need to refresh the test system, you can simply delete this new folder since nothing inherits from it. You would then recreate the folder which would update it with the latest data and settings. To create a new Test System folder, go to Setup>General Parameters>Folders. In the left list, select your production folder. Next, in the folder field enter the name of the new folder. Using this method, X3 will create the new folder copying the current settings from the Live folder. Next, change the "Copy Folder" and set to your Live folder. Press the Create button to create the new folder.