Microsoft BizTalk Server Party Migration Tool

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⊠Note

For the most recent version of this document, see http://go.microsoft.com/fwlink/?LinkId=197183.

BizTalk Server 2010 supports upgrade from BizTalk Server 2006 R2 or BizTalk Server 2009. As part of the upgrade experience, all the application data and artifacts are preserved so that after the upgrade, the BizTalk Server applications continue to run without any problems. In BizTalk Server 2010, the model for trading partner management (TPM) has gone through some fundamental changes. So, to migrate the party-specific data from BizTalk Server 2006 R2 or BizTalk Server 2009 to the new TPM model in BizTalk Server 2010, you must run the Microsoft BizTalk Server Party Migration Tool (Party Migration Tool).

Important

Microsoft recommends that you first understand the remodeled Trading Partner Management solution in BizTalk Server 201 0 before you start migrating the existing party definitions using the Party Migration Tool. For more information see, Building Blocks of a Trading Partner Management Solution (http://go.microsoft.com/fwlink/?LinkID=189331).

In This Section

- How Does the Party Migration Tool Work
- Considerations Before Using the Party Migration Tool
- How to Use the Party Migration Tool
- Considerations After Using the Party Migration Tool

How Does the Party Migration Tool Work

The Party Migration Tool is run against a BizTalk Server 2006 R2 or BizTalk Server 2009 management database (BizTalkMgmtDb), which contains all the information about parties and the corresponding settings in the specific BizTalk Server version. The tool presents a hierarchical structure of the party definitions as it exists in BizTalk Server 2006 R2 or BizTalk Server 2009 (pre-migration) and a suggestive hierarchical structure of how the new entities (partner, identities, agreements) will be created in BizTalk Server 2010 (post-migration). The tool also enables you to make changes to the suggested hierarchical structure by renaming the partners, moving identities between partners, deleting send port association, etc. Because your BizTalk Server setup may contain a large number of parties, updating all the parties, and related data, can take considerable time and would probably have to be done in batches. To facilitate that, you can use the **Save** option in the tool to save the changes that you have made. You can then use the tool at a later time and make changes to the remaining parties.

After making all the required changes, you can click **Finish** to store the settings to a target database. When you run the BizTalk Server 2010 upgrade, it reads the settings stored in the target database and creates the parties, profiles, agreements, etc. in BizTalk Server 2010.

Important

If the BizTalk Server 2006 R2 or BizTalk Server 2009 that you are upgrading includes party definitions, and you start the upgr ade process without running the Party Migration Tool, you would get an alert informing you to run the tool first.

Party Migration Workflow

To understand a typical workflow on how to use the Party Migration Tool, consider the following entities:

- **BizTalkMgmtDb** Name of BizTalk Server 2006 R2 or BizTalk Server 2009 database that contains live EDI/AS2 party data from a BizTalk Server deployment.
- MigrationDB Name of a temporary target database that contains all the migration information.

The following sequence of events must take place to migrate EDI/AS2 party data from BizTalk Server 2006 R2 or BizTalk Server 2009 to BizTalk Server 2010.

- 1. The user running the Party Migration Tool ensures that a temporary database, e.g. **MigrationDB**, is created in SQL Server. This database must be created in SQL Server 2008 SP1 or higher.
- Before upgrading to BizTalk Server 2010 a BizTalk Server administrator runs the Party Migration tool against the BizTalkMgmtDb, if the BizTalk Server 2006 R2 or BizTalk Server 2009 setup contains any EDI/AS2 party data that must be migrated.
- 3. The Party Migration Tool goes through the EDI data in the **BizTalkMgmtDb** and provides suggested migration of the EDI/AS2 artifacts.
- 4. The BizTalk Server administrator uses the Party Migration Tool interface to make changes, if required, to the migration suggested by the Party Migration Tool. If the number of parties to be migrated is quite high, the administrator can save the current changes and rerun the tool later.
- After making all the required changes, the BizTalk Server administrator clicks **Finish** on the Party Migration Tool. The Party Migration Tool creates tables in the temporary database to store information about the EDI/AS2 party migration. The upgrade operation cannot progress if the BizTalk Server administrator exits the Party Migration Tool without clicking **Finish**.

⊿ Tip
The tables can also be copied to a BizTalkMgmtDb tables in a test environment.

6. After exiting the Party Migration Tool by clicking Finish, the BizTalk Server administrator starts the upgrade process. During the upgrade process, the EDI/AS2 related migration data is copied from the temporary database (**MigrationDB**)

to the BizTalk Server 2010 management database, thereby creating all the required entities to comply with the new TPM model.

Considerations Before Using the Party Migration Tool

You must consider the following points before you use the Party Migration Tool.

- You must run the Party Migration Tool from the CD. You should not copy the tool executable to a separate location and then run.
- You must run the Party Migration Tool from the same computer where you inserted the CD or copied the CD locally. You should not run the tool over the network share of the CD drive.
- You must run the Party Migration Tool on a computer that has BizTalk Server Administration console installed.
- You must run this tool only against BizTalk Server 2006 R2 and BizTalk Server 2009 management database. The tool does not support migrating EDI application data from other BizTalk Server versions.
- If the source database (BizTalkMgmtDb) and the target database (where the tool copies the migrated party data) are on separate computers from the one where you are running the tool, make sure the computers running the databases and the computer where you run the Party Migration Tool have MSDTC configured. For instructions on how to configure MSDTC see How to Enable MSDTC on the BizTalk Server (http://go.microsoft.com/fwlink/?LinkId=190346).
- Make sure SQL Server is running on the computers hosting the BizTalkMgmtDb and the target database where the migration data will be copied to.
- Make sure the target database is running on SQL Server 2008 SP1 or higher. Also, the compatibility level of the SQL Server database must be 100. For more information about the compatibility level, see How to: View or Change the Compatibility Level of a Database (http://go.microsoft.com/fwlink/?LinkId=194986).
- Make sure you run only a single instance of the Party Migration Tool to migrate party data for a BizTalk Server installation. Running multiple instances of the Party Migration Tool (on a single or multiple machines) for migrating party data for a specific BizTalk Server installation is not supported.
- Make sure that the party definitions in BizTalk Server 2006 R2 or BizTalk Server 2009 are not configured in such a way that two EDI-specific parties have the same send port associated with them.
- Make sure that no two parties have the same AS2From and AS2To properties set.
- BizTalk Server 2006 R2 did not require BAM to be configured as part of AS2 configuration. However, for BizTalk Server 2010, you must have BAM configured before configuring AS2. So, while migrating from BizTalk Server 2006 R2 environment (that has AS2 configured) to BizTalk Server 2010, the tool first checks if BAM is configured. If not, the tool prompts you to configure BAM in BizTalk Server 2006 R2 and then run the tool.

How to Use the Party Migration Tool

Perform the following tasks to migrate party data from BizTalk Server 2006 R2 to BizTalk Server 2009 to a temporary migration database.

⊠Note

As a best practice approach, Microsoft recommends that you create a temporary database and not use an existing database t o which the Party Migration Tool will copy the migrated EDI application settings.

To use the Party Migration Tool

- 1. Insert the CD into the CD drive on a computer that has BizTalk Server Administration console installed as part of BizTalk Server 2006 R2 or BizTalk Server 2009 installation.
- 2. On the CD, open the **PartyMigrationTool** folder at the CD root, right click **PartyMigrationTool.exe**, and then click **Run as Administrator**. This starts the Microsoft BizTalk Server Party Migration Tool.

⊠Note]
You must always run the executable with administrative privileges	

- 3. From the File menu, click Initialize.
- 4. Select the If sender identities and receiver identities of a party are different, create different parties for them check box if you want to create different parties for the sender and receiver identities for a party.

For example, for a party with EDI configured, assume that Party as Sender is configured to process messages sent from A to B and the Party as Receiver is configured to process messages sent from B to C. In such a case, if you select the check box, after migration, three parties will be created (say P1, P2, and P3) and the respective identities will be added under each party. However, if the check box is cleared, two parties will be created (say P1 and P2) and A,C will be added as identities under one party and B will be added as identity under the other party.

- 5. Select the Create default AS2 agreements for all parties check box if you want the migrated party information to have a default AS2 agreement for all parties. This is required because in previous versions of BizTalk Server, you may have a party processing AS2 messages without setting the AS2-specific properties. However, in the new TPM model in BizTalk Server 2010, you must have an AS2 agreement for a party to process AS2 messages. So, if you select the check box, the migrated party data will have a default AS2 agreement for all parties.
- 6. In the BizTalk Management Database box, do the following:

Use this	To do this
Server n ame	Enter the name of the computer that hosts the BizTalk Server management database. If the same computer hos ts the database on which you are running the tool, you can enter a dot (.)
Database name	Select the BizTalk Server management database (BizTalkMgmtDb).
Test Con nection	Click this button to test the connection to the database.

7. In the Database to hold Migrated TPM Data box, do the following:

Use this	To do this
Server n ame	Enter the name of the computer that hosts the database to which the migrated TPM data will be copied. If the sa me computer hosts the database on which you are running the tool, you can enter a dot (.)
Databas e name	Select the database that you created to hold the migrated TPM data.

Test Con Click this button to test the connection to the database. nection

8. Click **Initialize**. As soon as you initialize the tool, it reads all the party information from the BizTalk Server 2006 R2 or BizTalk Server 2009 environment and presents it in a hierarchical format.

⊠Note

If the target database you selected stores TPM migration data for other party migrations, the tool prompts you before o verwriting the database.

The tool also presents how the EDI applications would be defined once you migrate all party data and upgrade to BizTalk Server 2010.

- The **Existing parties** section lists all the parties, and their settings, as they exist in BizTalk Server 2006 R2 or BizTalk Server 2009. By default all parties are selected. You can click **Unselect All** to clear the check boxes against all the parties. You can then select specific parties by clicking the check boxes against them or click **Select All** to select all the parties again.
- The **Parties created** section lists all the partners that will be created for the parties selected in the **Existing Parties** section.
- The **New agreements created** section lists all the agreements that will be created between the partners listed in the **Parties Created** section.
- 9. At this stage, you can either accept the suggested migration hierarchy or make changes to customize the migrated party data as described under Modifying the Suggestive Migrated Data. In either case, once you want to exit the tool, you have the following options.

Use th is	To do this
Save t o Migr ation datab ase	Click Save to Migration database to save the changes you made to the suggested party migration data. You m ust use this option if you need to make more changes and you want to the tool to remember the changes that yo u have already done.
Save t o Bind ing fil e	Click Save to Binding file to save the changes to a binding file. You must use this option if you want to import t he migrated data into a BizTalk Server 2010 test environment to understand how the EDI party data from BizTalk Server 2006 R2 or BizTalk Server 2009 would be reflected in a BizTalk Server 2010 setup after upgrade.
Finish	Click Finish when you accept the party migration hierarchy as displayed or after you have made all the required changes to the party migration hierarchy. When you click Finish , the tool stores all the migration information in the database and creates a flag indicating that the EDI party migration exercise has been completed. The tool als o shows a dialog box containing a link to a log file that contains the migration summary report. When BizTalk Server 2010 upgrade is run, it looks for this flag and then proceeds with the upgrade. If you have n
	ot clicked Finish in the tool, BizTalk Server 2010 upgrade does not proceed.
Close	Click Close to close the tool. If you have made changes to the suggested party migration data, you are prompted to save the data before exiting.
∳ Impo	rtant
To unde alk Serv	erstand how the parties, identities, etc. are migrated from BizTalk Server 2006 R2 or BizTalk Server 2009 to BizT ver 2010, see Understanding How the Data is Migrated.

Understanding How the Data is Migrated

This topic describes how the entities are migrated from the party definition in BizTalk Server 2006 R2 or BizTalk Server 2009 to BizTalk Server 2010. For reference, look at the following screenshot. The following screenshot shows how an existing party (**UP6_1**), and the associated identities, send port, etc. is migrated to BizTalk Server 2010.



How the Party in Earlier BizTalk Server versions is Migrated

• The party in previous BizTalk Server environment is migrated as one of the trading partners in BizTalk Server 2010.



- By default, every time a party is created in BizTalk Server 2006 R2 or BizTalk Server 2009, an alias with the same name as the party name is added to the party. There are no migrated entities equivalent to aliases in BizTalk Server 2010. So, the **Partners Created** section does not have any entities that map to the aliases.
- The sender qualifier and identifier values for the Party as Sender identities (for both X12 and EDIFACT) are added as identities to the partner created with the same name as the party in previous version of BizTalk Server (in the example used here, that party is **UP6_1**).



⊠Note

The naming convention for the identities that are derived from the Party as Sender identities is <*ISA5 value*>:<*ISA6 val* ue> (for X12 identities) and <*UNB2.2 value*>:<*UNB2.1 value*> (for EDIFACT identities).

• The receiver qualifier and identifier values for the Party as Receiver identities (for X12, EDIFACT, and AS2) are added as identities to the partner created with the same name as the party in previous version of BizTalk Server (in the example used here, that party is **UP6_1**).



⊠Note

The naming convention for the identities that are derived from Party as Receiver identities is <*ISA7 value*>:<*ISA8 value* > (for X12 identities), <*UNB3.2 value*>:<*UNB3.1 value*> (for EDIFACT identities), and *AS2Identity*:<*AS2To_value*> (for AS2 identities). In the above screen, notice that there is no value specified for UNB3.2 and hence the name of the identit y after migration will be **Unspecified:UP67865**. Here, **Unspecified** denotes the unspecified UNB3.2 value.

- The send port associated with the party in the previous versions of BizTalk Server is associated with the partner that is created with the same name as the existing party (in the example used here, that party is **UP6_1**).
- Similarly, the certificate associated with the party in the previous versions of BizTalk Server is associated with the partner that is created with the same name as the existing party (in the example used here, that party is **UP6_1**).

How the Other Partners are Created

• The Party Migration Tool takes the receiver qualifier and identifier values from the Party as Sender identity and uses them to name the other parties. The tool also creates a **BizTalkHost** party that would contain the AS2From value in the Party as Receiver settings as one of the identities.



In the preceding screenshot, denoted by the solid red lines, the partner **QualifierIdentity_4_321UP6** is named by using the ISA7 and ISA8 values for Party as Sender identity for the existing party's X12 identity. Similarly, the partner **QualifierIdentity_4_321UP61** is named by using the UNB3.2 and UNB3.1 values for Party as Sender identity for the

existing party's EDIFACT identity.

At the same time, the receiver qualifier and identifier values for the Party as Sender identities are also added as identities under the same parties. These are denoted by dashed red lines in the preceding screenshot.

⊠Note

The convention used to arrive at a partner's name is *QualifierIdentity_ISA7_ISA8* (for X12) or *QualifierIdentity_UNB3.2_UNB3.1* (for EDIFACT). The naming convention to arrive at an identity name is same as mentioned earlier in this docum ent.

• The sender qualifier and identifier values for the Party as Receiver identities (for X12, EDIFACT, and AS2) are added as identities to the partner created as described in the preceding bullet.



In the preceding screenshot, because there is no value specified for UNB2.2 as part of the EDIFACT identity for Party as Receiver, hence the name of the identity after migration will be **Unspecified:UP6123**. Here, **Unspecified** denotes the unspecified UNB2.2 value.

How the Agreements are Created

The one fundamental thing that does not change before and after migration is that the message intended for a specific partner must reach that partner. In BizTalk Server 2006 R2 or BizTalk Server 2009, message routing is ensured as part of the party definition and the sender/receiver qualifier and identities are defined as part of the party definition. In BizTalk Server 2010, message routing is ensured by defining agreements and the sender/receiver qualifier and identities as part of the agreement. Fundamentally, the agreements are created by using these identities. Even though as part of migration, the identities, which were earlier defined as part of the same party, are now under different partners, the agreements will still be created between the same identities to ensure that the messages reach the intended. This is the guiding principle in the way agreements are created for migrated partners. Let us understand this using a few examples:

- For UP6_1 party, an X12 identity for Party as Sender has ISA5 and ISA6 as 01 and 123UP6. Similarly, ISA7 and ISA8 for the same is 04 and 321UP6. This combination is used to route X12 messages between 123UP6 and 321UP6. So, to represent this in the migrated environment, the tool creates an agreement **1_123UP6_4_321UP6_x12**. The "x12" suffix denotes that it is an X12 agreement.
- For UP6_1 party, an EDIFACT identity for Party as Receiver has UNB2.1 and UNB2.2 as UP6123 and *unspecified*. Similarly, UNB3.1 and UNB3.2 for the same is UP67865 and *unspecified*. So, to represent this in the migrated environment, the tool creates an agreement **Unspecified_UP6123_Unspecified_UP67865_edifact**. The "edifact" suffix denotes that it is an EDIFACT agreement.
- For UP6_1 party, an AS2 identity for Party as Receiver has AS2From as BizTalk1 and AS2To as UP6_1. To represent this in

the migrated environment, the tool creates an agreement **BizTalk1_UP6_1_as2**. The "as2" suffix denotes that it is an AS2 agreement.

⊠Note

If the identities under Party as Sender and Party as Receiver are same, the tool creates a single agreement for both of them.

⊠Note

The other identities that you see under the BizTalkHost party may be added as party of other party migration.

The send ports are associated with the agreements that are created mapping the Party as Receiver identities.

See Also Concepts How to Use the Party Migration Tool

Modifying the Suggestive Migrated Data

Once you have understood how the new parties and agreements are created, you can make a few changes to customize the migrated data per your needs. The following table lists the possible operations and also provides instructions on how to perform those operations.

Possible Ope rations	Steps to Perform the Operations
Rename a part y	In the Parties created section, right-click a party, click Rename Party , and enter a new name for the party.
Delete a party	In the Parties created section, right-click a party, and then click Delete Party .
	Important Before deleting a party you must move all the artifacts under the party to another party.
Move identitie s to another p arty	In the Parties created section, right-click the identity you want to move, and select Move Identity to Party . In the dialog box, select an existing party or click New Party to create a new party and then move the identity und er that party. Click OK . Read the information on the dialog box and click OK .
	Tip You can also move an identity by dragging and dropping it under the party where you want to move it to.
	Important When you move an identity, the associated send ports are also moved to the new party and a message appear s informing you of the same. Associated send ports are ports that are used to send messages to the identity b eing moved.
	Important When you move an identity, the associated certificates are not moved. You must move the certificates manuall y by dragging and dropping them to the relevant party.
Remove send port associatio n for a party	In the Parties Created section, right-click the send port that you want to disassociate from the party, and then click Delete Send Port Association . Read the information on the dialog box and click OK .
Move certifica tes to another party	In the Parties created section, right-click the certificate you want to move, and select Move Certificate to Par ty . In the dialog box, select an existing party or click New Party to create a new party and then move the certifi cate under that party. Click OK . Read the information on the dialog box and click OK .
	Image: Image: An and the ansatz of the analysis of the ana
See Also	

Concepts How to Use the Party Migration Tool

Considerations After Using the Party Migration Tool

You must consider the following points before you use the Party Migration Tool.

- In the new Trading Partner Management (TPM) model in BizTalk Server 2010, every party must have a business profile. However, as you noticed in the preceding sections, the tool does not create a business profile. That is because all the identities for a party are added to a profile, **Default Profile**, which is created for every party. You will see this profile in the TPM user interface in the BizTalk Server Administration console after you have completed the upgrade operation.
- In previous BizTalk Server versions, a party was created only for the other trading partners. For example if Party A is trading with Party B, and Party A is hosting BizTalk Server, you need to create a party only for Party B. However, in the new TPM model in BizTalk Server 2010, you must have a party even for the trading partner hosting BizTalk Server. So, to use the same example, both Party A and Party B must be created as parties in TPM. This is specified by selecting the **Local BizTalk processes messages received by the party or supports sending messages from this party** check box in the **Party Properties** dialog box. By default, as part of the migration process, the Party Migration Tool marks this check box as selected for all the parties that are created as part of the migration process.

Known Issues with Party Migration Tool

Known Issues

The following are the known issues with Party Migration Tool.

Party Migration tool will not be able to load 'app.exe.config' file on Windows Server 2003

Symptom

On startup, Party Migration tool crashes and throws an exception **FileNotFoundException**, this exception can be seen by attaching a debugger to the tool.

Cause

Microsoft .NET framework expects to read the file <app>.config instead of <app>.exe.config.

Resolution

Rename **PartyMigrationTool.exe.config** to **PartyMigrationTool.config**, and then run the Party Migration tool.

⊠Note

If the above resolution does not fix the issue, make sure you rename **PartyMigrationTool.config** back to **PartyMigrationT** ool.exe.config.

Import of older binding files with EDI Party Migration

Importing older binding files for BizTalk Server applications that include EDI party data is not blocked. We recommend that you do not import bindings to migrate EDI party data from BizTalk Server 2006 R2 or BizTalk Server 2009 to BizTalk Server 2010.

⊻ Tip	
Use the party migration tool for all EDI party migration	s.

Microsoft Windows Server 2000 does not support Party Migration Tool

Workaround: You need to install Microsoft Windows Vista, and then install BizTalk Server Administration console to run the Party Migration Tool.