**LMS** Instance Refresh Service Request Form Instructions

Review the form in its entirety ensuring to enlist the proper resources within your organization. Resources typically include IT, System Administrators, and Subject Matter Experts or Business Process Owners.

#### Instance Refresh Tool is now generally available and can be used instead of manual LMS refresh service requests, see below Knowledge Base Articles: (Please note you will be required to be logged in the launchpad to review them):

* + [2835061 - Learning Management System Automated Refresh Process](https://launchpad.support.sap.com/#/notes/2835061)
  + [2791468 - Instance Refresh Tool for BizX & LMS | Must-know guide & FAQ](https://launchpad.support.sap.com/#/notes/2791468)

#### If not previously reviewed, please take the time to review the following Knowledge Base Articles:

(Please note you will be required to be logged in the launchpad to review them)

* + [2165346 - LMS Refresh Request process](https://launchpad.support.sap.com/#/notes/2165346)
  + [2258754 - Connector input file missing from sftp folder after LMS clone/](https://launchpad.support.sap.com/#/notes/2258754)refresh
  + [2248132 - Learning: Unable to Access LMS Admin post refresh](https://launchpad.support.sap.com/#/notes/2248132)
* Complete all sections in full, entering N/A were applicable

#### Once complete, please Sign and Date, constituting full understanding, completion details and agreement.

* Save and attach this Service Request Form to Cloud Product Support ticket (SAP Support Portal [here](https://launchpad.support.sap.com/))

Important Notes:

* Tenant Refreshes are Service Requests, and it should be submitted as a Medium incident and not part of the suite UI and thus does not have an applicable SLA’s or commitments to complete. Operational limitations could prevent refreshes, and all are subject to Operational approval and ability to complete.
* Tenant Refresh requests require a minimum of 10-business day Operational scheduling lead time. Requests in a shorter timeframe could be denied purely on availability and other customer commitments.
* In addition to the 10-business day required lead-time, customer should permit anther 5 business days for CPS Services to conduct a 1:1 meeting with applicable customer resources.

1. **Contact information**

|  |  |
| --- | --- |
| Company Name: |  |
| Requestor Name and Title: |  |

1. **Service Request Category**





NOTE: A clone is a 2 parts activity:  
1/ creation of a brand-new instance (please provide order number and proof of purchase)

2/ the refresh of this instance with the source of your choice.

NOTE: If you are requesting performing an LMS Refresh with the Gold Snapshot as the Source, please note there might be a variation of data because of the creation date of the Gold Snapshot. If the Gold Snapshot contains a version mismatch, then we will automatically revert to your LMS production instance as Source.   
***A Gold Snapshot is an LMS back up of the database taken upon customer request at a point in time (usually after implementation).***

1. Instance/Environment Details

|  |  |
| --- | --- |
| LMS Source Data Center |  |
| LMS Source Instance URL  (Instance used to replace Target details) |  |
| Source Environment Type/Login URL  e.g. Production or Preview |  |
| LMS Target Data Center |  |
| LMS Target Instance URL  (Instance overwritten from Source) |  |
| Target Environment Type/Login URL   * e.g. Production or Preview |  |
| Preferred Date and Time  Note:  *All refreshes will be scheduled OUTSIDE of standard peak busy hours respective to the DC Region Time:*  *•EU: M/F 08:00 – 20:00 GMT*  *•US: M/F 08:00 – 20:00 US/ET*  *•AU: M/F 08:00 – 20:00 AU/ET*  *Note: If a Refresh/Clone is scheduled on the same weekend as the code release or data center maintenance, said activities will take precedence. The refresh must be scheduled after the code release or maintenance is completed.* | *This is a mandatory field.*  *Kindly mention only date/time/time zone you want this refresh to be perform.*  *We suggest giving an alternate date, because if the 1st preference date is not available then we can consider alternate date.* |
| Note: a script is completed during the Refresh process nullifying all employee profile email addresses within Target instance. | |
| Note: all the pending emails contained in the database of your source instance will be purged in the target instance. | |

|  |  |
| --- | --- |
| 1. I confirm that I have validated all details contained within this Service Request with applicable Admins and/or necessary resources within my organization prior to submitting this request. 2. I confirm that there are no ongoing projects or implementations within the Target instance currently under way that could be impacted via completion of this Service Request. 3. I understand that any configuration or customization that currently exists within the Target instance will be deleted through the Refresh activity and non-retrievable at post completion. 4. My organization uses the following SuccessFactors Modules or feature Integration(s). Please ensure that the Target Integration(s) is kept after the refresh: | |
| **Provide below details of Target Instance** | |
| Do you have Custom Extensions Configured? (yes/no) |  |
| I accept and agreed that not all the above modules are supported by the Refresh. I also read and understand that the Refresh does not establish licensed modules within Target even though the Source might have such licensed modules. Target will maintain the original Integration aspects as prior to Refresh | |
| Signature:  Date: | |

NOTE:

Source Instance Downtime: There is no downtime required for Source instance (\*Legacy Table Space instance excluded)

Target Instance Downtime: This instance will require downtime during the rebuild/import of Source data/configuration. Most will take approximately 4 hours but can be more depending on data size.

|  |
| --- |
| Refreshing or Cloning an instance is a complex process with many considerations depending on each instance configuration and integration. We encourage you to review the previously referred articles to be aware in advance on the specifics your system could require Post Refresh or Clone. |

APPENDIX

Best practices and points of understanding are outlined below:

1.Each Refresh Request should incorporate a 1:1 meeting with CPS resource and customer required resources (IT, Admins, Leadership, etc) to ensure all commitments and expectations are aligned. This should be a requirement for larger more complex customers as there is often multiple admins per module, and will ensure proper alignment.

2.Completions are conducted during off-peak week day hours of the server. Weekends are not permitted unless Operations determines requirement based on inability to complete within a single off-peak server window (IE: Requires a Saturday & Sunday off-peak to complete successfully)

3.Customers should expect the Tenant Refresh to commence at start of server off-peak hours and returned from Operations at conclusion of server off-peak hours. Any estimate provided regarding completion times is information based only and does not imply availability (IE: 2hr estimate does not imply an 8pm EST start will have instance available at 10pm EST). Operation teams have complete discretion in processing of all requested tenant refreshes as they deem necessary for successful completion by server off-peak conclusion.

4.Operation procedures will be completed within the stated off-peak hours. Post refresh procedures of CPS Service team and/or customer are not incorporated into this stated timeframe. As well, business hours of CPS resource and customer Admins should be clearly outlined during 1:1 meeting, with population access to Target based on this collaboration.

5.Customers should not expect periodic updates during refresh process. CPS resource will update via incident at start of business hours and inform customer of any post refresh completions and when instance is available for customer usage and review.

**6.Is there an option to choose configurations OR user data/history refresh, but not both?**A Refresh is a complete replace operation and is **all-or-nothing**. All user data, history, configuration and templates will be cloned. Incremental configuration data, such as Form Templates and Rating Scales can be migrated manually between instances using Admin Tools features if a full data replace is not desired.

7.**Will the target instance be available during instance refresh?**

Target instance should be viewed as inaccessible during the entire refresh process.

After this time, post refresh activities will be conducted by the customer to ensure full functionality in TARGET.

8. **What pre- and post- refresh steps do I or my SF POC need to perform?**

Please review [2165346 - LMS Refresh Request process](https://launchpad.support.sap.com/#/notes/2165346) for steps.