**Instance Refresh Form Instructions**

**2311 release version**

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.

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

* + KBA #2088117, ([link](https://launchpad.support.sap.com/#/notes/2088117) : Username & Password required)
  + KBA #2277508, ([link](https://launchpad.support.sap.com/#/notes/2277508) : Username & Password required)
  + KBA #2313764, ([link](https://launchpad.support.sap.com/#/notes/2313764) : Username & Password required)
  + KBA #2463898, ([link](https://launchpad.support.sap.com/#/notes/2463898) : Username & Password required)
  + KBA #2315083, ([link](https://launchpad.support.sap.com/#/notes/2315083) : Username & Password required)
* 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

#### Important Notes:

* **Instance Refresh Tool Enablement**

We now have the [**Instance Refresh Tool**](https://help.sap.com/docs/SAP_SUCCESSFACTORS_PLATFORM/5644466b2c304e45b2e412ded198078b/5fde4df935114a0aa375f4066237c527.html) available in Successfactors for BizX & LMS refreshes, which allows customers to schedule & execute a refresh without having to engage Support.  
  
This tool can be used for most refreshes, excluding a few specific scenarios where the tool has technical limitations. Those limitations are covered in [KBA 2791468](https://launchpad.support.sap.com/#/notes/2791468) , under the "**LIMITATIONS**" section

BizX & LMS Refreshes that are technically eligible to be performed using the Instance Refresh Tool, must be scheduled using the tool itself. Manual Refresh request for such refreshes will not be accepted by the Support team.

Manual refresh will only be an option for-

* Refreshes that cannot be scheduled in the Instance Refresh tool due to its technical limitations.
* Refreshes that were scheduled using the Instance Refresh Tool, but have failed or gotten reverted for any reason.

**References:**

1. [Instance Refresh Tool Admin Guide](https://help.sap.com/viewer/5644466b2c304e45b2e412ded198078b/1902/en-US/e21168d0b33542e2be021d829b767623.html)
2. [Community Blog Post](https://community.successfactors.com/t5/Platform-Resources/NextGen-experience-to-Instance-Refresh/bc-p/211774#M398)
3. KBA #2791468 – ([**link**](https://launchpad.support.sap.com/#/notes/2791468) : Instance Refresh Tool)

* Starting b2005 Release, all attachments copied from source will be replaced by dummy attachments in the target instance. If you require your attachments to be copied, please mention in the support case.
* Any kind of refresh (Manual or through Instance Refresh tool) is **not reversible** post completion. So please make sure to provide correct source & target details while requesting the refresh.
* If SOURCE is SSO and TARGET is Non-SSO, prior to the refresh make sure an admin account is established in SOURCE, via import containing Password column. This will be used to access TARGET instance post refresh by customer or partner.
* Only Internal & External candidate and Employee Profile Email addresses will be masked through **Manual Instance Refresh**. Scrambling of data and any other email address masking is not part of **Manual Instance refresh**. Any sensitive information requiring modification will be the sole responsibility of the Customer Admin.
* EC Enabled Instances - To mask EC Email Address Fields, SF Admins should do manually by uploading dummy email id through employee Import. This should be done as soon as the refresh is completed to avoid syncing live user email addresses to BizX Email Addresses on the target instance once the HRIS Job runs. (KBA#[**2315276**](https://launchpad.support.sap.com/#/notes/2315276))
* LMS Integrated instances must have a valid employee export job scheduled in target environment.
* Support only reverts select integration settings in the target as part of post activities. If the target instance already has the wrong configuration pre-refresh, this will not be corrected as part of the refresh request.
* Tenant Refreshes are Service Requests and it should be submitted as a P3 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.

**Have you tried to use Instance Refresh Tool (IRT) ?**

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**If YES, Which of the following statuses have showed on IRT ?**

**Reverted**

**Failed**

**Validation Failed**

*Details*:

Insert details of the ERROR CODE on the log file

1. **Contact information**

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

1. **Service Request Category**







1. **Instance/Environment Details**

|  |  |
| --- | --- |
| Source Data Center |  |
| Source Company ID  (Instance used to replace Target details) |  |
| Source Environment Type/Login URL   * Production * Preview |  |
| Target Data Center |  |
| Target Company ID  (Instance overwritten from Source) |  |
| Target Environment Type/Login URL   * Production * 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 you to give alternate date because if the 1st preference date is not available then we can consider alternate date.* |
| Do you need **Internal Email masking**?  Note:  Please note a script is completed during the Refresh process replacing all BizX employee profile email addresses within Target instance with dummy e-mail address ‘'dummy@sap” | *Yes/No* |
| Do you need **external (RCM) email masking**? Yes indicates…  *You have Recruiting Management (RCM)   enabled in your Source instance (BizX)    External RCM email addresses will be masked  with dummy email address* No indicates…  Keep same email address as the Source  **External Candidate Email Address** - By default, if you have specified on this form that you have RCM enabled in SOURCE, automatically, External Candidate Email addresses in the TARGET instance will be masked as part of the BizX Refresh Process. This prevents external candidates receiving emails from testing.  No other data will be scrambled and will be Customers responsibility within Target post refresh.  The script will replace all email addresses within Target instance with dummy e-mail address like ‘test@abc.com’ or ‘'dummy@sap.com'’ | *Yes/No* |
| Do you need Data Anonymization?  Note:   1. Data Anonymization will cover a limited set of fields across BizX. Please refer to this guide for the complete list of fields that are covered-> [Instance Refresh Data Anonymization Fields | SAP Help Portal](https://help.sap.com/docs/SAP_SUCCESSFACTORS_PLATFORM/5644466b2c304e45b2e412ded198078b/abef2cf6e1564c6789bbca024b75fb16.html) 2. Data Anonymization, once done, cannot be reverted. If mistakenly opted for, only option will be to rerun the refresh. 3. Selective Data Anonymization is not possible with manual refresh | *Yes/No* |
| Would you like to exclude Global User ID Cleanup?  See: [Retain Global User IDs in Instance Refresh](https://help.sap.com/docs/successfactors-release-information/8e0d540f96474717bbf18df51e54e522/3a5b88fc26cb413290ca298f778dcd83.html) | *Yes/No* |

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. Estimate will be provided during 1:1 meeting with a CS Services Consultant

|  |  |
| --- | --- |
| 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. | |
| 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 | |
| * 1. Do you have Jam? (**yes/no**) |  |
| * 1. Do you have LMS? (**yes/no**)   If yes, please confirm if the employee export job is scheduled? **(yes/no)** |  |
| * 1. Do you have the New Homepage Experience? (**yes/no**)  **Note:** For refreshes, home page version will be copied from SOURCE instance. If you have this configured in the TARGET and would still like to proceed with the refresh, all settings related to new home page experience will be wiped out. |  |
| * 1. Do you have Onboarding? (**yes/no**) |  |
| * 1. Do you have Recruiting Management (RCM)? (**yes/no**) |  |
| * 1. Do you have Recruiting Marketing (RMK)? (**yes/no**)  If yes, please share the RMK Security Key to support by following KBA [2976861](https://launchpad.support.sap.com/#/notes/2976861). |  |
| * 1. Do you have SSO? (**yes/no**)  Are you using IAS (SAP Cloud Platform Identity Authentication Service)? – KBA [2791410](https://launchpad.support.sap.com/#/notes/2791410)   If yes, please read KBA [2954491](https://launchpad.support.sap.com/#/notes/2954491) for the known limitations for IAS integrated instances. Post activities are required to be completed by the admin user. |  |
| * 1. Do you have WFA (Workforce Analytics)? (**yes/no**) |  |
| * 1. Do you have People Analytics? (**yes/no**)  If yes, please read this KBA [**2315083**](https://launchpad.support.sap.com/#/notes/2315083) on the steps to take for Story reports . |  |
| * 1. Do you have recurring FTP Jobs? (*i.e. Employees Import or Employees Export*) |  |
| * 1. Do you have any other modules you may be using | a.  b. |
| 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: | |

APPENDIX

Best practices and points of understanding are outlined below:

1. If it is the **first time you are requesting** an Instance Refresh, and if you would like to get some clarification on the process and expectations, please request through the Support ticket to have a 1:1 meeting with CPS resource and customer required resources (IT, Admins, Leadership, etc) to ensure all commitments and expectations are aligned. This is also recommended for larger complex customers as there is often multiple admins per module and will ensure proper alignment.

2. Completions are conducted during off-peak weekday 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. **I only want configurations OR user data/history refreshed, but not both. Is that possible?**

A Refresh is a complete rip-and-replace operation and is all-or-nothing. All user data, history, configuration and templates will be cloned. Incremental configuration data, such as Form Templates,

Route Maps and Rating Scales can be migrated manually between instances using Admin Tools features if a full data replace is not desired.

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

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

After this time, post refresh aspects will be conducted to ensure full functionality in TARGET. A date/time will be provided of when the TARGET will be a viable instance for access, testing and usage.

8.**What is not copied during a Refresh?**

Ans : A Refresh will copy all contents of the instance database schema. This will include internal instance settings (permissions in Admin Tools, Detailed Reporting Rights, Company System and Logo settings, etc.), template configuration and supporting content materials (competencies, rating scales, pick lists, etc.), user data and history and other content of the instance.

(BizX Only) If requested, Operations will run a process to copy most module/feature settings (Company Settings). Any setting not covered by this tool or any setup/configuration that needs to differ from the Source instance is the responsibility of the customer and their SF POC. Please coordinate with your SF POC for any follow-up actions you or your SF POC may need to perform (e.g. setup of new admin account(s), loading of specific Competency libraries, changing feature-set compared to Source, RBP setup, SSO disabling if copied from Source, etc.).

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

Ans : Here are some general actions you may need to perform prior to or after a refresh. Please consult with your SF POC to ensure all necessary actions are accounted for.

* + For all scheduled FTP jobs in the target instance will be deactivate after post refresh and SF-POC or Partner need to be reconfigure/restore these jobs manually after refresh
  + Target IP restrictions need to be reestablished to the original setting post refresh