**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.**

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

* 1. KBA # 2463898, ([link](https://launchpad.support.sap.com/#/notes/2463898) – username & password required)

1. Complete all sections in full, entering N/A were applicable

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

1. Save and attach this Service Request Form to Cloud Product Support ticket (SAP Support Portal [here](https://launchpad.support.sap.com/))
   1. Attach also a signed Schedule A or Statement of Work (where relevant).
2. **Contact information**

|  |  |
| --- | --- |
| **Company Name:** |  |
| **Requestor Name and Title:** |  |
| **Admin Account:** |  |

1. **Service Request Category (Select Only One)**

* Instance Refresh Request: 
  + Complete overwrite of existing Target from existing Source instance
* Instance Clone Request: 
  + Contract stipulations apply. Net New instance not applicable under Free Refresh Offering

1. **Module Refresh Availability: BizX (Foundations), LMS & ONB (One Per Form)**

BizX, LMS and ONB data is managed on separate database instances requiring separate Refresh / Clone request. Please complete one of these forms for each applicable module.

* BizX (Foundations)
* LMS (Learning)

**NOTE (For LMS refresh only): In we are performing an LMS Refresh from Gold Snapshot as Source, please note there might be a variation of data within based on when Gold Snapshot was created. If Gold Snapshot contains a version mismatch then we will automatically revert to your LMS production instance as Source. We strictly recommend against using the Gold Snapshot for Refresh and maintain that for intent; LMS backup.**

1. **Instance/Environment Details**

|  |  |
| --- | --- |
| **Source Data Center** |  |
| **Source Company ID**  **(Instance used to replace Target details)** |  |
| **Source Environment Type**   * Production * Preview * Staging * Dev |  |
| **Target Data Center** |  |
| **Target Company ID**  **(Instance overwritten from Source)** |  |
| **Target Environment Type**   * Production * Preview * Staging * Dev |  |

1. **Completion Time and Downtime**

|  |  |
| --- | --- |
| **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*  *Refresh/Clone scheduling requires agreement during your 1:1 meeting with a CS Services Consultant and needs to be completed no later than 8 days before the next scheduled* [*Refresh/Clone cycle*](https://launchpad.support.sap.com/#/notes/2295199/E) *(depending on availability)*  *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****.*** |  |
| **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** |  |

1. **Additional Services Details:**

|  |  |
| --- | --- |
| **BizX only – Do you want Company Settings to be matched along with data/configuration copy? (Yes/No)** |  |
| **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 like ‘test@abc.com’ or ‘'dummy@sap.**     * **Yes** * **no** |  |
| **BizX only – Do you have Recruiting Management (RCM) enabled in your Source instance?**  **Note:**  **Please note a script is completed during the Refresh process replacing all email addresses within Target instance with dummy e-mail address like ‘test@abc.com’ or ‘'dummy@sap.com'’**  **This prevents external and Internal candidates receiving emails from testing/processes, as well as emails that derive from PM or any other email related processes within Target instance.**  **No other data will be scrambled and will be Customers responsibility within Target post refresh.**   * Yes * No |  |
| **BizX only – Do you have Recruiting Marketing (RMK) enabled in your Source instance?**   * Yes * No |  |
| **BizX only – Do you have Recruiting Marketing (RMK) enabled utilizing SSO Candidate enabled?**   * Yes * No   **If YES this would exclude instance (SOURCE or TARGET) being a part of Instance Refresh** |  |

1. **Confirmation and signature**

|  |  |
| --- | --- |
| 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: | |
| * 1. Extension Package Config (**yes**/**no**) |  |
| * 1. Instance Sync (**yes**/**no**) |  |
| * 1. JAM (**yes**/**no**) |  |
| * 1. LMS - Learning (**yes**/**no**) |  |
| * 1. ONB - Onboarding (**yes**/**no**) |  |
| * 1. RCM - Recruiting Management (**yes**/**no**) |  |
| * 1. RMK - Recruiting Marketing (**yes**/**no**) |  |
| * 1. SSO (**yes**/**no**) |  |
| * 1. WFA - Workforce Analytics (**yes**/**no**) |  |
| * 1. Add any other modules you may be using |  |
| 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. **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. Tenant Refreshes are Service Requests, 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.
3. 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.
4. 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.
5. 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)
6. 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.
7. 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.
8. 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.
9. Only the External, Internal candidate and Employee Profile Email addresses will be masking through instance refresh. NO other data or email address will be modified. Any sensitive information requiring modification will be the sole responsibility of the customer, Admin.

1. EC Enabled Instances - Admins should do a manual Email Information Import to mask EC Email Address Fields. 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. (<https://launchpad.support.sap.com/#/notes/2315276>)
2. 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.

1. Is target instance will be available during instance refresh?

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.

1. What are not copied during a Refresh?

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.).

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

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.

* \*\*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.
* 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