**Migrating Workforce Analytics (WFA) customers to HCM Preview environments:**

This document describes the process to follow when a WFA customer requests the migration of the WFA instance to a HCM Preview environment. It covers two key scenarios:

* Scenario 1: The customer already has WFA enabled in a test instance and wants to migrate this test instance to a HCM Preview environment
* Scenario 2: The customer does not have WFA enabled in a test instance and wants to create a new WFA test instance in a HCM Preview environment.

**Scenario 1: The customer already has WFA enabled in a test instance and wants to migrate this test instance to a HCM Preview environment**

This is the simpler of the two scenarios and only requires effort by the WFA Cloud Operations team.

The customer is migrating their SuccessFactors test instance and they have an associated Analytics test instance that already has WFA enabled. So the Analytics inventory would look like this for the customer:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| DATACENTRE | ORGID | ORGNAME | CUSTOMERTYPE | OLAPDATABASE | BIZXINSTANCE\_Value |
| DC4 | Cameco | Cameco Corporation | Workforce Analytics (WFA) | Cameco201511030850 | Cameco |
| DC4 | CamecoTest | Cameco Corporation | Workforce Analytics (WFA) | CamecoTest201312092353 | CamecoTEST |

In this example the customer wants to migrate the SuccessFactors *CamecoTEST* instance from DC4 Production to HCM4 Preview. The customer has a corresponding Analytics instance called *CamecoTest* with WFA enabled.

For your customer make a copy of the Jira template below (environment specific) to request the migration of the WFA TEST instance to the appropriate HCM Preview environment.

* DC2: [PROJOPS-9627](http://jira.successfactors.com/browse/PROJOPS-9627)
* DC4: [PROJOPS-9628](http://jira.successfactors.com/browse/PROJOPS-9628)
* DC8: [PROJOPS-9629](http://jira.successfactors.com/browse/PROJOPS-9629)
* DC12: [PROJOPS-9207](http://jira.successfactors.com/browse/PROJOPS-9207)

**Scenario 2: The customer does not have WFA enabled in a test instance and wants to create a new WFA test instance in a HCM Preview environment.**

Within this scenario there are two options that a customer may choose from. The option they choose will determine which teams need to be involved.

The customer is migrating their SuccessFactors test instance and they have that SuccessFactors test instance integrated with an Analytics Production instance that has Workforce Analytics (WFA) enabled. So the inventory might look like this for the customer:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| DATACENTRE | ORGID | ORGNAME | CUSTOMERTYPE | OLAPDATABASE | BIZXINSTANCE\_Value |
| DC8 | Travelers | Travelers | Workforce Analytics (WFA) | Travelers201511031939 | Travelers, TRVLRSTest |

In this example the customer wants to migrate the SuccessFactors *TRVLRSTest* instance from DC8 Production to HCM8 Preview. The Analytics configuration has been done in such a way that integrates both the SuccessFactors *TRVLRSTest* test and the *Travelers* Production instances with the Analytics *Travelers* Production instance. This means that on the Analytics side the *Travelers* Production instance will contain a mix of production and test users and reports. Analytics migration procedures cannot clone one instance as another (with a different name). They can also not split one instance into two. If this customer is actively using the integration between their SuccessFactors test instance and their Analytics production instance then they may request that an Analytics test WFA instance is set up in the HCM8 Preview environment.

There are two options available. Either an Analytics test WFA instance is set up in the HCM8 Preview environment with:

1. a demonstration data for WFA; or
2. a one-time copy of the customers Production WFA data.

The recommendation is to encourage the customer to choose the first option.

Why?

* Test environments are usually used by customers to test software. They do not necessarily need a version of their Production data to perform this type of testing
* There is more effort and teams required to perform option 2
* Test environments should not typically host production data
* If option 2 is performed then it will be a one off snapshot. The data will not be refreshed from production on a regular basis.

Requesting Option 1:

There is an existing process performed by a Cloud Operations team in India that creates a new instance (based on the DemoSiteInt cube) for a new WFA customer. This process is triggered by a sales event. It is proposed to leverage this existing process to create a new TEST instance (based on the DemoSiteInt cube) for a migrating WFA customer.

*Important Notes:*

* If a SuccessFactors instance migration is also involved then this option may be done ahead of and independent of the migration of the SuccessFactors instance. When the SuccessFactors instance is migrated it will be integrated with the new Analytics instance.

Create a new PROJOPS Jira using the templates below to request the creation of this new WFA TEST instance for the customer in the HCM preview environment. Note the template is designed as an example. You will need to make the appropriate adjustments to your copy of the template to adjust for your customer and environment.

* DC2: [PROJOPS-9633](http://jira.successfactors.com/browse/PROJOPS-9633)
* DC4: [PROJOPS-9630](http://jira.successfactors.com/browse/PROJOPS-9630)
* DC8: [PROJOPS-9632](http://jira.successfactors.com/browse/PROJOPS-9632)
* DC12: [PROJOPS-9634](http://jira.successfactors.com/browse/PROJOPS-9634)

Requesting Option 2:

*Important Notes:*

* If a SuccessFactors instance migration is also involved then both of these options may be done ahead of and independent of the migration of the SuccessFactors instance. When the SuccessFactors instance is migrated it will be integrated with the new Analytics instance.
* This task can only be performed when the source and target WFA data centres are running the same version of the application software. This is because the process to migrate the WFA cube and configuration cannot cross versions.

Create a new PROJOPS Jira using the templates below to request the creation of this new WFA TEST instance for the customer in the HCM preview environment. Note the template is designed as an example. You will need to make the appropriate adjustments to your copy of the template to adjust for your customer and environment.

* DC2: [PROJOPS-9636](http://jira.successfactors.com/browse/PROJOPS-9636)
* DC4: [PROJOPS-9631](http://jira.successfactors.com/browse/PROJOPS-9631)
* DC8: [PROJOPS-9635](http://jira.successfactors.com/browse/PROJOPS-9635)
* DC12: [PROJOPS-9637](http://jira.successfactors.com/browse/PROJOPS-9637)