

Early Test Instance Release Program

Migration Overview for 1:1 Customers

SuccessFactors Test-Preview Migration Team 2016



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An SAP Company



Agenda

- **Program Overview**
- **Migration Overview**
- **Migration Details**



Early Test Instance Release Overview

What & When?

We will begin a phased migration of test instances to separate data pools with the Q1 2015 release.

Why?

To give you access to release code in your test instance in advance of release to your production instance.

Preparing for Migration

Review this [SuccessFactors Community Post](#) to read FAQs, review the release schedule, learn about your test instance URL, and more.

Expect brief downtime:

You will not be able to access your test instance for one week during the migration.

This will NOT affect your production instance.

After the Migration

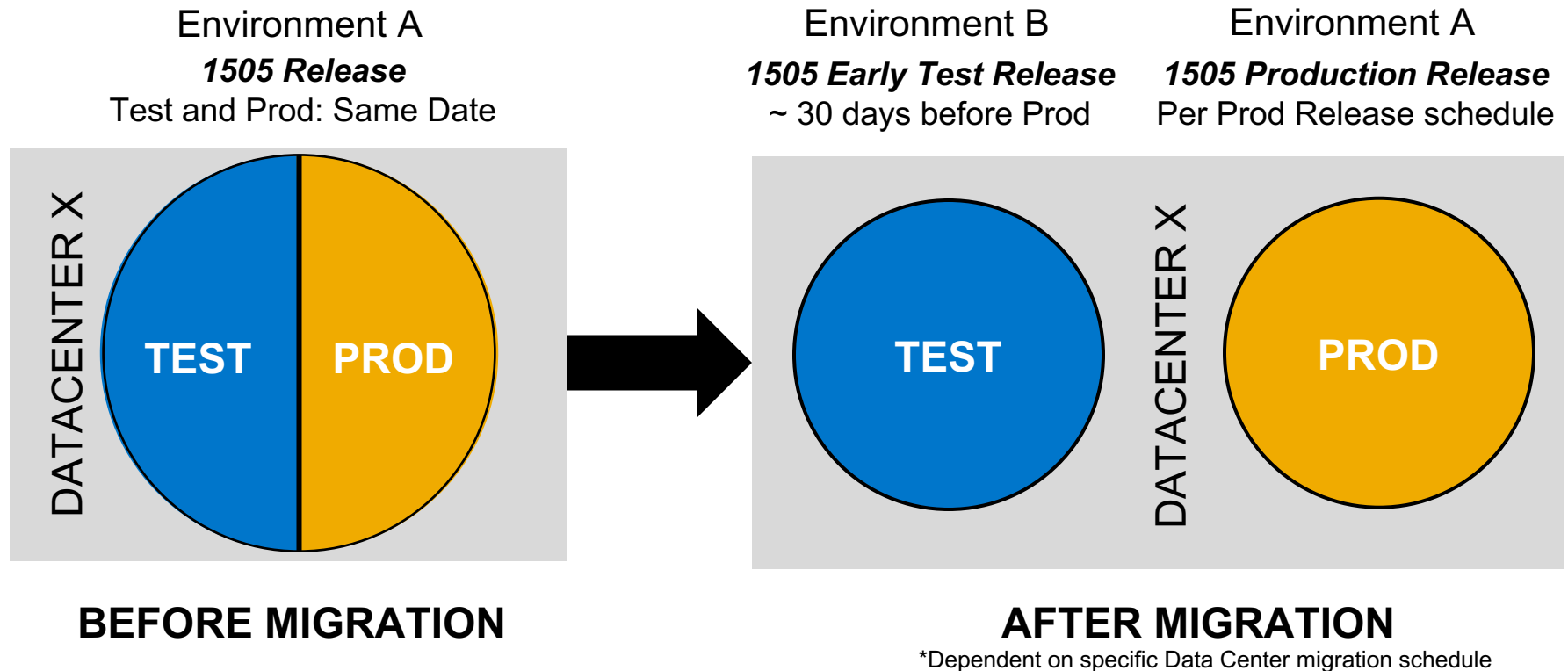
Following migration, you will benefit from approximately 30 days of additional time to review documentation and test release code prior to its release to your production instance.

Expect a “blackout period” quarterly for the ~30 days your Test Instance previews the upcoming release.

You will be able to make changes to both Test and Production instances during this time, but cannot migrate between the two.

Early Test Release

What does this mean?



To learn more about the benefits and details of this migration, please visit this **Community Post**:

<http://community.successfactors.com/t5/Resources-and-Updates/Release-Schedule-and-Early-Test-Instance-Release-2015/ba-p/95677>

What is my release schedule?

Please note (*) that the Early Test Release dates apply only to test instances which have been migrated to the Early Test Release stack prior to that date. If your test instance is not migrated prior to Production Release date for a specific release, then the new release will be applied to both your test and production instances according to the Production Release schedule.

If a customer has their Production instance in a different DC than their Test instance, then those instances will receive the release based on the DC in which each is located. So, for example, if Production is in DC8 and Test is in DC4 and it has not been migrated to the Early Test Release stack, then Test will receive Q1 2016 on March 4th.

DC2/DC4/DC8/DC10/DC12	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Early Test Release*	11-Feb	6-May	5-Aug	4-Nov
Production Release	11-Mar	3-June	9-Sept	2-Dec

The 2016 Release Schedule can be seen here:

<http://community.successfactors.com/t5/Support/2016-Release-Schedule/ba-p/111303>

Customer Facing Information

Blackout Dates

There will be black-out dates when code, configuration, and features cannot be migrated from your Early Test Release instance to Production since the code bases between the two environments will differ.

Black-out dates by data center are outlined below.

DC2/DC4/DC8/DC10/DC12	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Early Test Release*	11-Feb	6-May	5-Aug	4-Nov
Production Release	11-Mar	3-June	9-Sept	2-Dec

Please note that blackout dates apply only to test instances which have been migrated to the Early Test Release stack prior to the blackout start date. If your test instance is migrated after the Early Test Release date but before the Production Release date, your blackout period will start when your migrated test instance comes up on the Early Test Release stack, because it will then be on the new release.

Top 7 Takeaways

1. Your test instance will have a new URL.
2. There is a new release schedule that includes black-out dates related to test-to-production migration.
3. Your test instance will experience a data freeze and downtime during the migration – your instance will be deactivated during the migration process and **not** re-enabled. (*Decommission will occur 6 weeks post migration delivery)
4. Nothing is changing with your production instance.
5. Preview migrations only apply to non-Validated LMS instances. Removing an LMS instance from Validated requires contractual modifications and must be directed to LMS teams before a Preview Migration can be completed“
6. Provisioning Access: If you are currently working with a partner/consultant, please have them access the preview URL to confirm they can access. If they cannot access the instance in Preview, please ask them to file a case through Partner Support.
7. Continue to check SAP ONE Support Launchpad for more information:
<https://launchpad.support.sap.com/#!/notes/2115525/>



What happens now?

You are receiving this document because your DC is now ready for migration and you submitted a case to start the free migration process to migrate your test instance to the new Early Test Release/Preview environment.

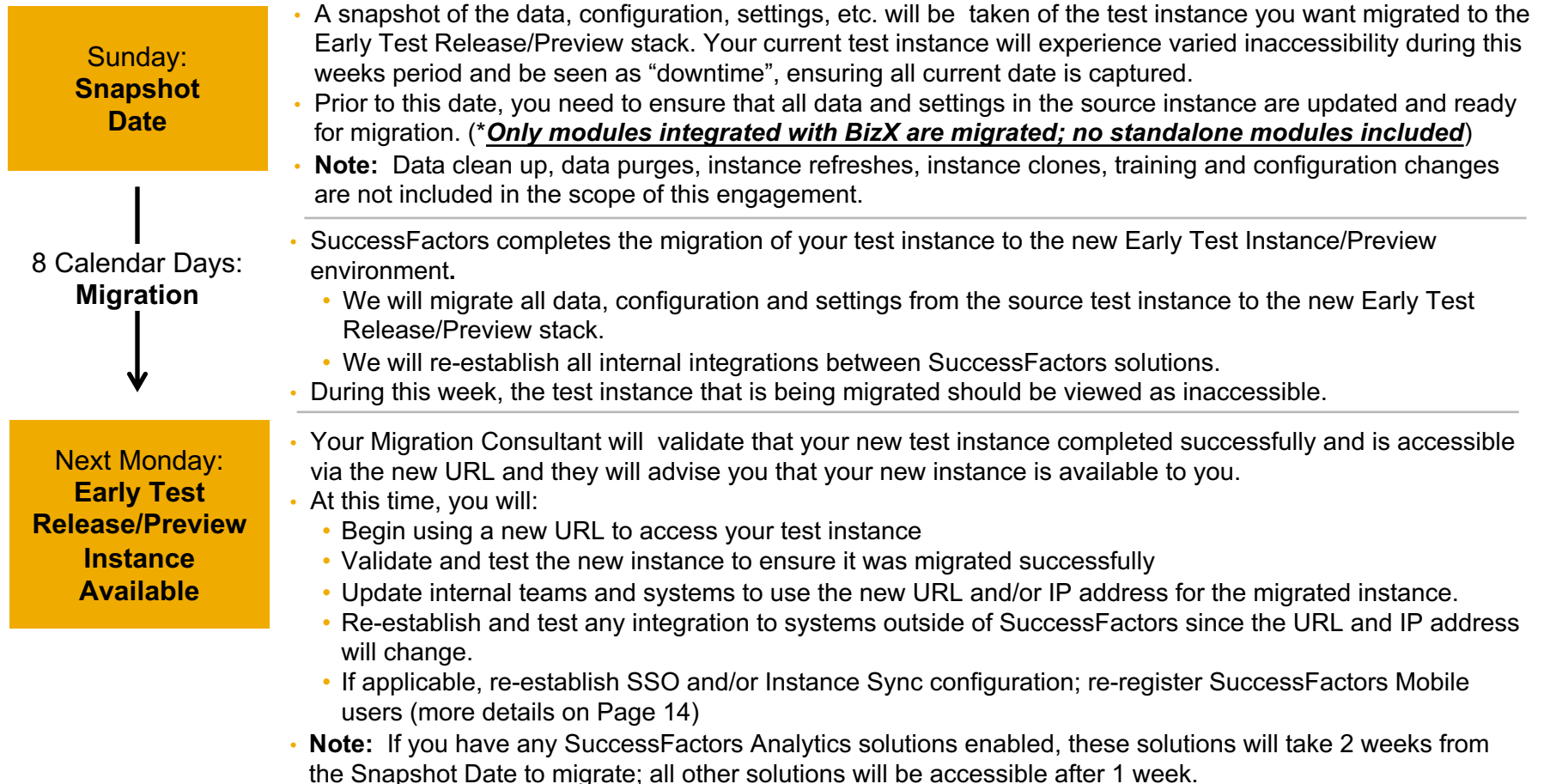
You have already been assigned a Migration Consultant who will guide you through the rest of the migration process. This document will provide you with more information on the scope, approach, and timing. This document is a supplement to the [FAQ](#) which you should read as well.

Your migration consultant will be scheduling a 1:1 Meeting with you to:

- Answer any questions that you have on this document or the FAQ
- Determine which instance (Company ID) you would like migrated to the Early Test Release/Preview environment
- Confirm that we have all of the information that we need about your environment to perform the migration
- Schedule the actual migration process (*BizX and current integrated modules only)

What can we expect from the migration?

See next page for migration dates. When you meet with your consultant, you will agree on a **Snapshot Date**. This date is determined based on your availability to have 1 week of downtime in your current test instance and our availability to process your migration.











When can I migrate?

SNAPSHOT DATE	EARLY TEST RELEASE/PREVIEW INSTANCE AVAILABLE
2016	
14-Sep	21-Sep
28-Sep	5-Oct
12-Oct	19-Oct
26-Oct	2-Nov
Q4 Early Test Release: Nov 4	
9-Nov	16-Nov
23-Nov	30-Nov
Q4 Production Release: Dec 2	
CLOSED: December	
2017	
8-Jan	16-Jan
22-Jan	30-Jan
Q1 Early Test Release Feb 11	
5-Feb	13-Feb
19-Feb	27-Feb
Q1 Production Release Mar 11	

- ***Note:** Snapshots will be taken at 8PM, based on your data center
- Your test instance will be unavailable this period and would not be available until the Early Test/Preview Instance Available date.
- Migration dates are subject to availability and your Migration Consultant will discuss our availability with you.
- Analytics solutions do require one additional week for migration. (2nd Monday from Snapshot Date)
- If your production and test instances are split between DCs, your test instance is eligible for migration when the migration begins for the PROD DC.
- **Snapshot date must be confirmed between you and your Migration Consultant at least 14 business days before the requested snapshot (depending on availability).**
- Cut-off date for free migration engagements:
 - **A migration date should be scheduled on or before Feb 19– Feb 27 cycle to qualify for the free offering**
- If you are unable to migrate before the cut-off date, a paid test-preview migration service will be available.

Can you please provide a bit more information on the post migration tasks I need to perform?

Task	Details
1 Begin using the new URL. Update internal teams and systems to use the new URL and/or IP address for the migrated instance.	 URL and IP Info.pdf
2 Validate the new test instance and ensure it was migrated successfully	<ul style="list-style-type: none"> • Execute any testing you would typically perform to ensure that the migration was completed successfully. • If any issues are noted which appear to be related to the migration, update your Migration support case and the Migration Team will work with you to address.
3 Re-establish integrations external to Success Factors	 External Integrations
4 Re-establish SSO configuration (only applicable if using SSO in Test)	<div>  SSO Changes DC7  SSO Changes DC4  SSO Changes DC8  SSO Changes DC12  SSO changes DC10 </div>
5 Re-establish Instance Sync configuration (only applicable if using Instance Sync)	 InstanceSync Cheat Sheet
6 Register mobile users (only applicable if using SuccessFactors Mobile)	<ul style="list-style-type: none"> • If you are using SuccessFactors Mobile, you will need to reregister all users that were previously present.

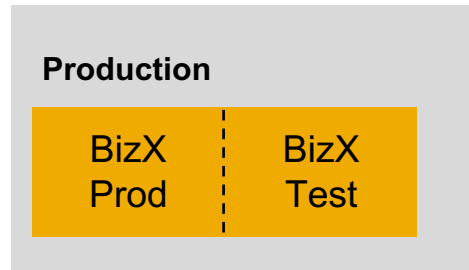


Major Steps involved in the Migration Process

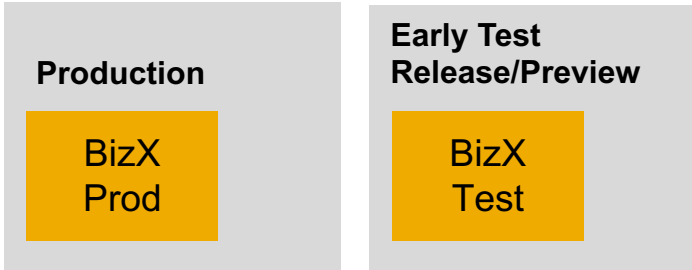
- Migration execution involves downtime for the customer in the source Test environment.
- During the downtime period, the customer's source Test system will not be available.
- The Company ID of the Test instance on the Early Test Release/Preview stack will be the same as the identified source Test Instance from the Production stack. All of the data, configuration and company settings will be copied into the newly created instance on Early Test Release/Preview stack.
- Data is copied from source database pool to target database pool using data export/transfer/import method. Export is taken using Oracle's proprietary EXPDP utility which produces compressed file and can only be decrypted/read using Oracle's IMPDP utility.
- **** Any configuration changes completed to instance post 1:1 could result in delay or removal from cycle. (IE: Modules implemented/enabled; Refreshes; Company ID changes)**

Approach by Product Area: SuccessFactors HCM Suite (BizX)

Pre-Migration



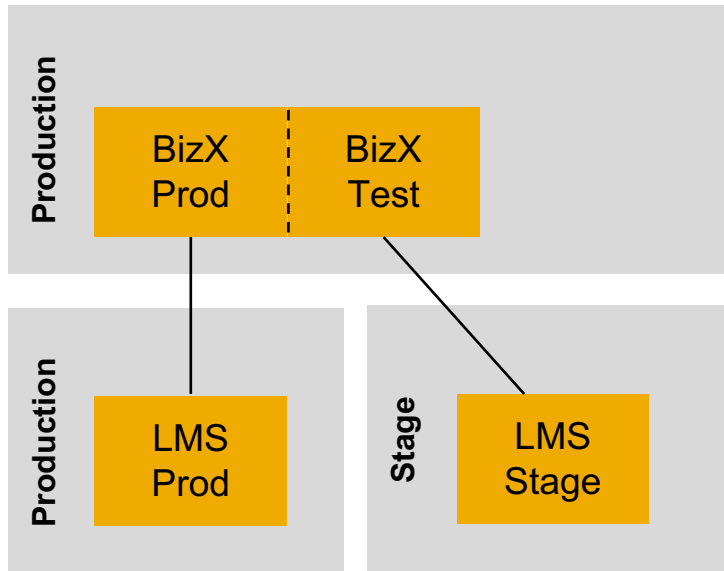
Post-Migration



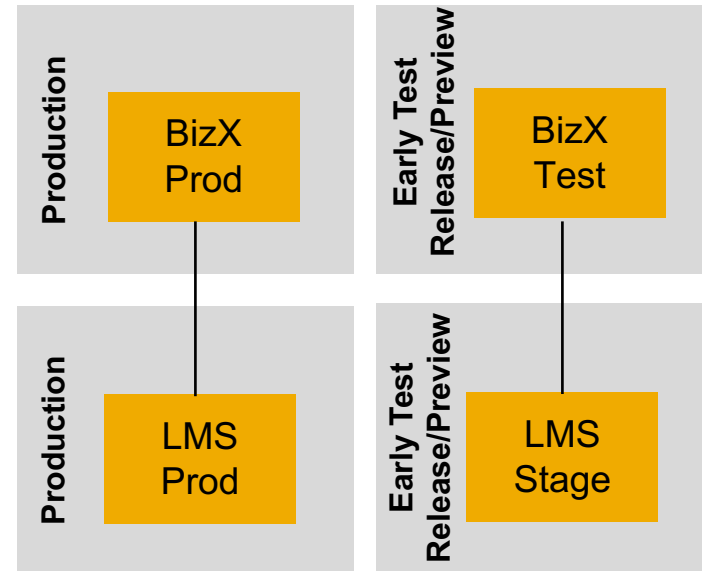
- **BizX includes the following components:** Platform, Performance Management, Recruiting Management, Succession Management, Variable Pay, 360, Calibration, Employee Profile, Employee Central (excluding EC Payroll), Goal Management, Compensation, Career & Development Planning
- Prior to migration, your BizX Prod and BizX Test instances were both located on the Production stack.
- During the migration process, a Snapshot will be taken of your selected BizX Test instance and this will be migrated to the Early Test Release/Preview stack. All **internal** SuccessFactors integrations between your new BizX Test instance in the Early Test Release/Preview stack will be reset as part of the migration process (more detail in following slides). However, you will need to re-establish all external integrations.
- After the migration, your BizX Test instance on the Early Test Release/Preview stack will receive new releases 30 days prior to Production
- If you have more than one BizX test instance (e.g. Employee Central), it is recommended that you move only one to the Early Test Release/Preview stack. This ensures that one test instance is always on the same version as Production for fixes, promote to Production, training, etc. If you do decide to move more than one instance to the new Early Test Release/Preview stack, the migrations will occur in a staggered fashion and will not be completed at one-time. Also, there will be a cost involved if, in the future, you do decide to move any migrated Test instanced back to the Production stack.

Approach by Product Area: Learning (LMS)

Pre-Migration



Post-Migration



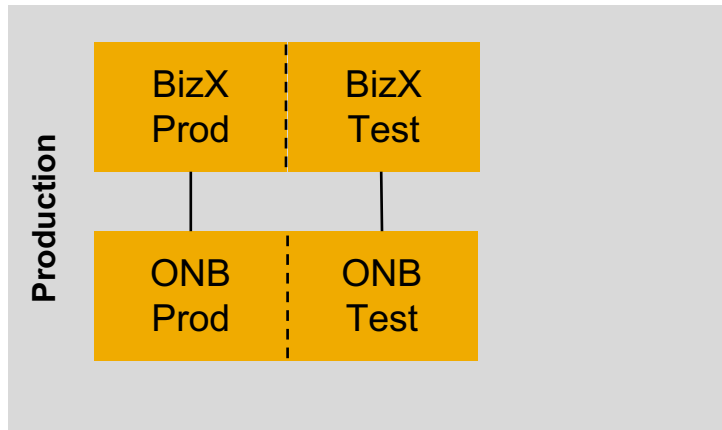
- Prior to this program, you had an LMS Stage instance which was separate from the Production stack.
- Thus, there will be no snapshot or migration performed for LMS as part of this project. However, your new BizX Test instance on the Early Test Release/Preview stack will be repointed to your LMS Stage instance.
- After the migration, your BizX Test instance on the Early Test Release/Preview stack and your LMS Stage instance will receive new releases 30 days prior to Production
- **Preview migrations only apply to non-Validated LMS instances. Removing an LMS instance from Validated requires contractual modifications and must be directed to LMS teams before a Preview Migration can be completed"**

Note:

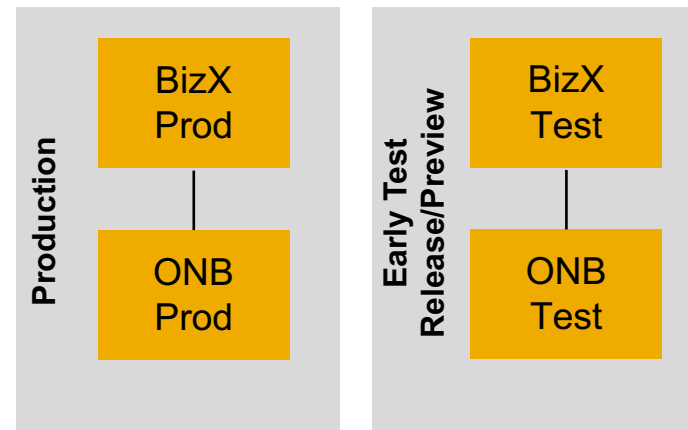
This information only applies if you have integrated the licensed/enabled the noted solution in your test environment.

Approach by Product Area: Onboarding (ONB)

Pre-Migration



Post-Migration



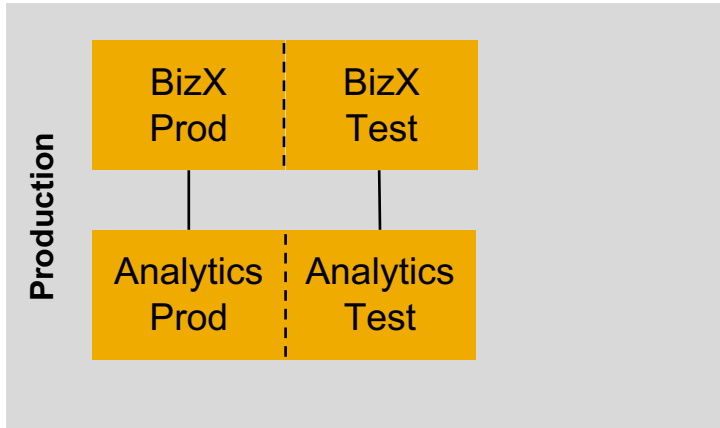
- Prior to migration, your ONB Prod and ONB Test/Stage instances were both located on the Production stack.
- During the migration process, a Snapshot will be taken of your ONB Test/Stage instance and this will be migrated to the Early Test Release/Preview stack, replacing the old ONB Test/Stage instance. The internal integration between your new ONB Test/Stage instance and new BizX test instance in Early Test Release/Preview environment will be reset as part of the migration process.
- After the migration, your BizX Test and ONB Test/Stage instances on the Early Test Release/Preview stack will receive new releases 30 days prior to Production.
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Note:

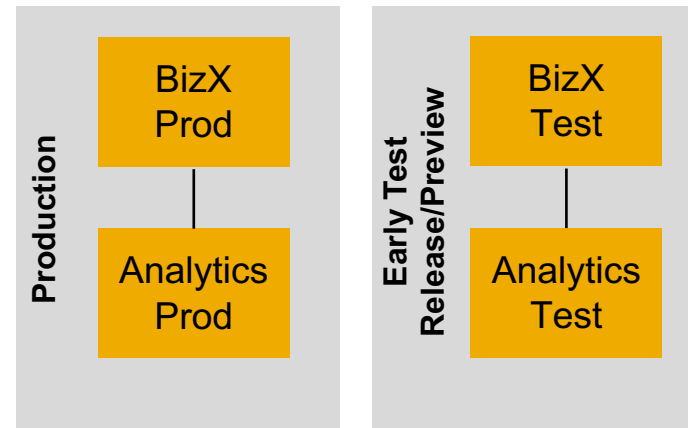
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Approach by Product Area: Analytics except WFA

Pre-Migration



Post-Migration



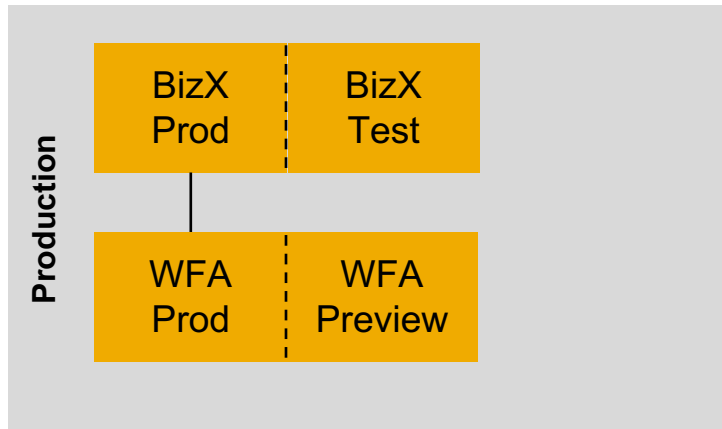
- **Analytics except WFA includes:** EC Advanced Reporting (ODS) – Advanced Reporting in ORD and Foundations (Platform) – Adhoc Report Builder and/or Dashboard and Tiles. See page 25 for more details.
- Prior to migration, your Analytics Prod and Analytics Test instances were both located on the Production stack.
- During the migration process, a Snapshot will be taken of your Analytics Test instance and this will be migrated to the Early Test Release/Preview stack. The internal integration between your new Analytics Test instance and new BizX test instance on the Early Test Release/Preview stack will be reset as part of the migration process.
- After the migration, your BizX Test and Analytics Test instances on the Early Test Release/Preview stack will receive new releases 30 days prior to Production.
- Please note that Analytics solutions will take 2 weeks from the Snapshot Date to migrate; all other solutions will be accessible after 1 week.

Note:

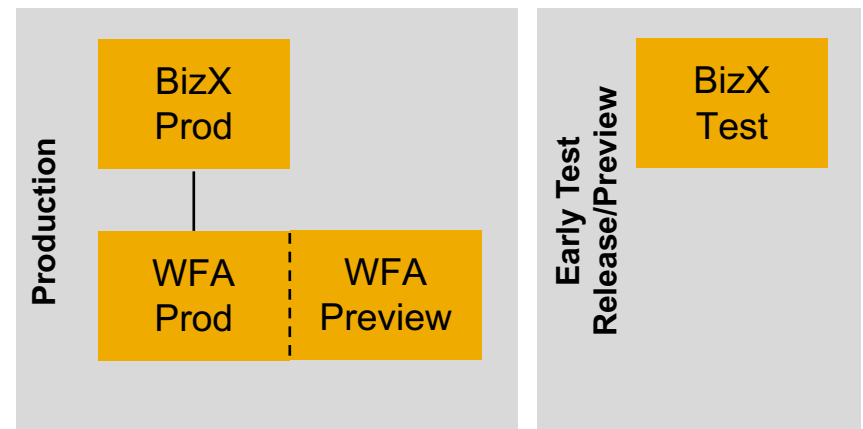
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Approach by Product Area: Workforce Analytics (WFA)

Pre-Migration



Post-Migration



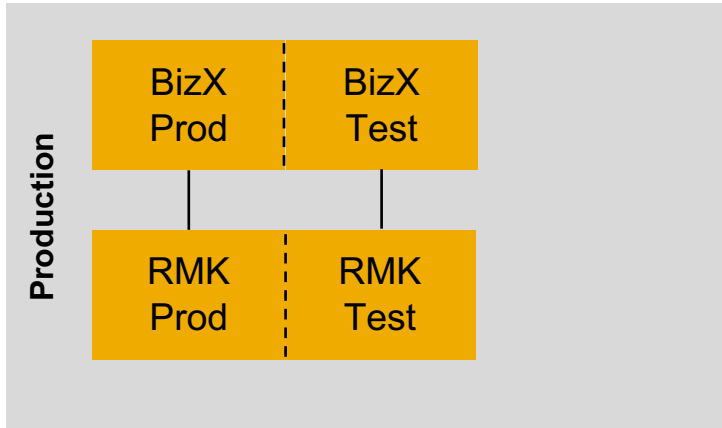
- Prior to this program, WFA was only supported on the Production stack. This includes both WFA Production and WFA Preview, where new data is released each month for QA before being released to WFA Production.
- **If your BizX test instance being migrated is currently connected to your WFA instance, that integration will be broken when your BizX test instance is migrated to the Early Test Release/Preview stack.**
- If you would like have a WFA environment integrated with your BizX test instance on the Early Test Release/Preview stack, we can create a new WFA instance on the Early Test Release/Preview stack using a “demo” WFA instance. If you choose this option, your WFA instance on the Early Test Release/Preview stack will receive new releases 30 days prior to Production. Please let your Migration Consultant know if this is something that you’d like to do.
- Please note that Analytics solutions will take 2 weeks from the Snapshot Date to migrate; all other solutions will be accessible after 1 week.

Note:

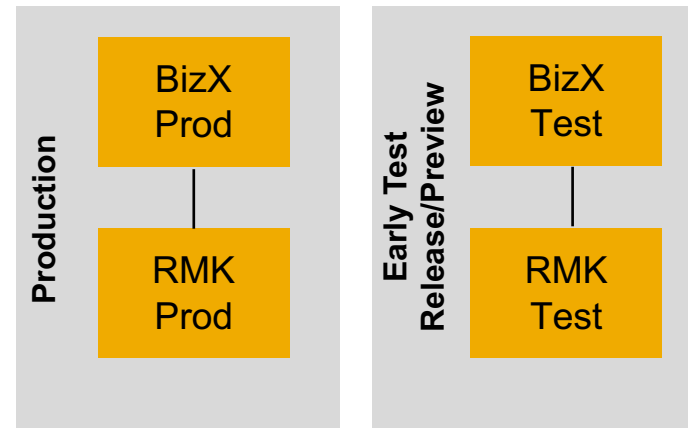
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Approach by Product Area: Recruiting Marketing (RMK)

Pre-Migration



Post-Migration



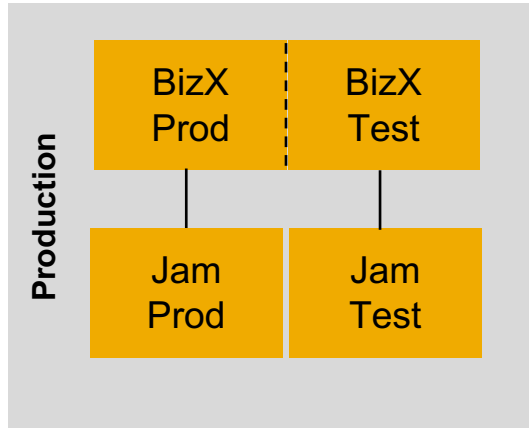
- Prior to migration, both your RMK Prod and RMK Test instances were located on the Production stack.
- During the migration process, a Snapshot will be taken of your RMK Test instance and this will be migrated to the Early Test Release/Preview stack, replacing your old RMK Test instance. The internal integration between your new RMK Test instance and new BizX test instance on Early Test Release/Preview stack will be reset as part of the migration process.
- After the migration, your BizX Test and RMK Test instances on the Early Test Release/Preview stack will receive new releases 30 days prior to Production

Note:

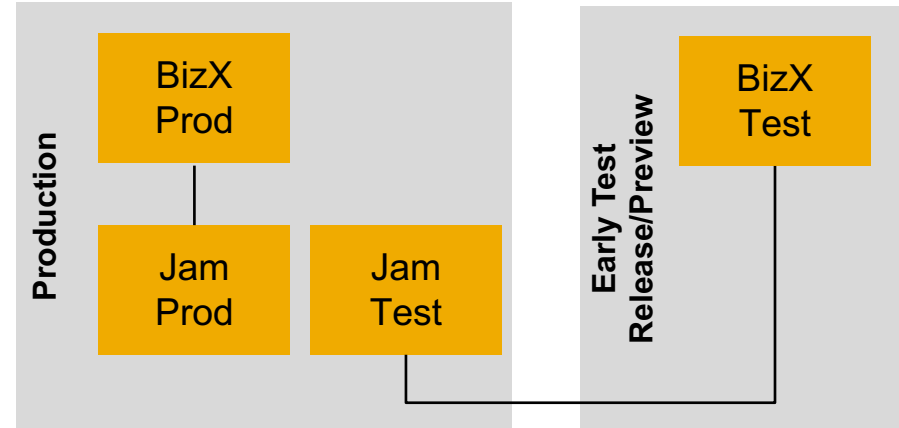
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Approach by Product Area: SAP Jam

Pre-Migration



Post-Migration



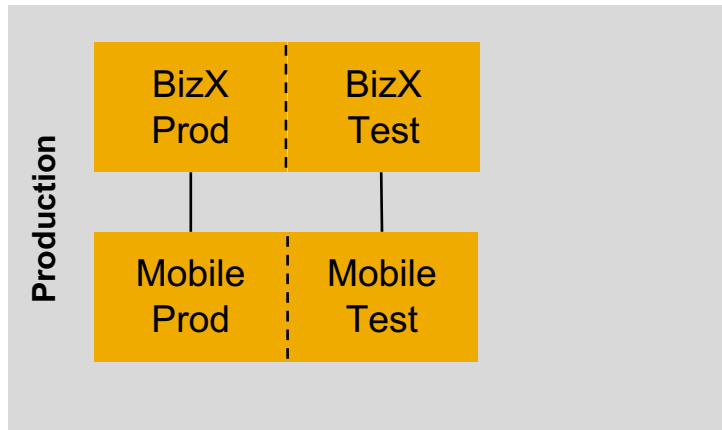
- SAP Jam instances are housed on the Production stack and this will not change as part of the Early Test Release project.
- Even though there is a single location for your test and production instances, the product is developed in such a way that, after migration, you will receive an Early Test Preview for your Test Instance while Production will stay on the Production release schedule. As part of the migration, your test Jam instance will be integrated with your migrated BizX instance on the preview server.

Note:

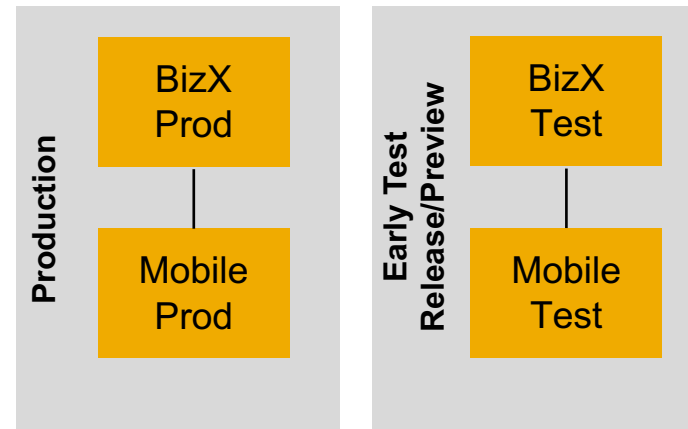
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Approach by Product Area: Mobile

Pre-Migration



Post-Migration



- Prior to migration, both your Mobile Prod and Mobile Test instances were both located on the Production stack.
- During the migration process, a Snapshot will be taken of your Mobile Test instance and this will be migrated to the Early Test Release/Preview stack. The internal integration between your new Mobile Test instance and new BizX test instance on Early Test Release/Preview stack will be reset as part of the migration process.
- Reregistration of previous users after the migration will be required.
- After the migration, your BizX Test and Mobile Test instances on the Early Test Release/Preview stack will receive new releases 30 days prior to Production

Note:

This information only applies if you have integrated the licensed/enabled the noted solution in your test environment.

Approach by Product Area: Employee Central Payroll

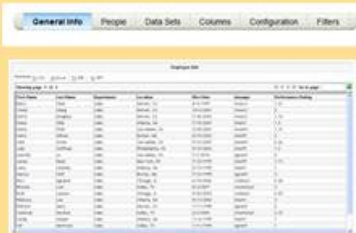
- Employee Central Payroll is hosted separately from BizX and, thus, it is not impacted by the migration.
- After the migration, the customer will need to change URLs in middleware (PI, BOOMI, etc.) integration between the new Test Instance on the Early Test Release Stack and their Employee Central Payroll environment. See step 3 on page 13 for details.

Additional Information: Analytics

Self Service Reporting Tools

Adhoc Report Builder

- List Reports
- Simple Data Extraction
- Excel, CSV, PDF, PPT
- Data Source: All Modules, excluding LMS & MDF



Dashboards & Tiles

- Home Page Tiles
- Online Dashboards
- Track key process'
- Drill from Chart to List
- Deliver on Mobile
- Data Source: All Modules, excluding LMS & MDF



Advanced Reporting in ORD

- Printable
- Multi Page
- Formatted
- List Reports
- Charts & Graphs
- Calculated Columns
- Aggregated Columns
- Scheduler
- Data Sources: EC, Talent, MDF & LMS
- Excel, CSV, PDF, PPT, DOC, Email



Workforce Analytics

- Time Trended Metrics
- Benchmarks
- Drill through Hierarchies
- Build report on WFA Metrics data in ORD
- Analytical Visualizations
- Data Sources: All Modules & Integrate External Data Sources





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