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# Using the Instance Refresh Tool

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# 1 Instance Refresh Overview

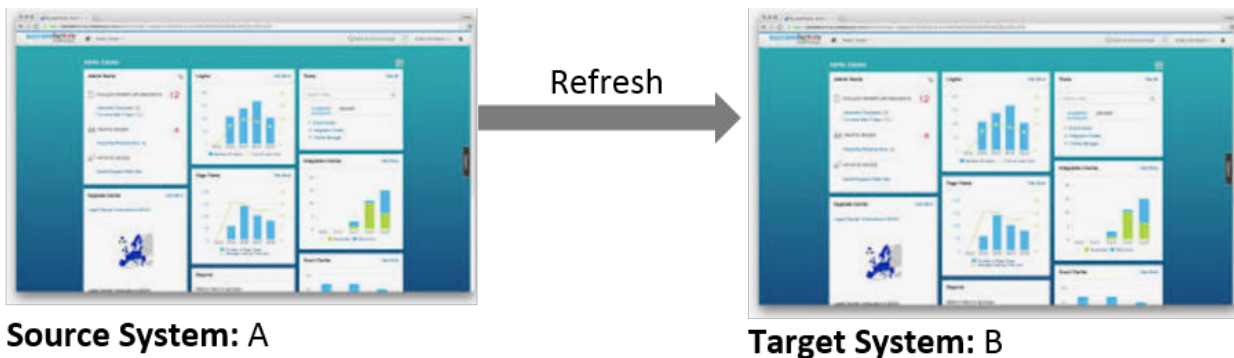
The Instance Refresh tool helps you to create a replication request of SAP SuccessFactors HCM suite and monitor the status of the request from the source to target instance.

A refresh is the process of copying data and configuration from source to target, without impacting the integrations in the target. The source is the instance from which data and configurations are copied to the target instance. The target is the instance to which data and configurations are copied using Instance Refresh. Essentially, admin should have access to both the source and target instances.

## Note

During an instance refresh, replication excludes certain data such as attachments, audit logs, and so on.

The Instance Refresh tool cannot be used for cloning.



The key features of the instance refresh tool are as follows:

- You can create a refresh request by choosing the target instance on any future preferred date of refresh. Log in to the source instance to launch the Instance Refresh tool through [Admin Center](#) from which you can initiate refresh on a desired target instance.
- You can view the history of all refreshes initiated from the logged in source instance.
- You can view and track the status of already submitted refresh request which has not been completed yet.
- You can cancel the refresh request as long as the status of refresh request is not [In Progress](#).
- You can download the error log file as audit report for any refresh requests that didn't succeed.
- The admin, who initiates the request, receives email notification alerts containing the instance refresh status and the subsequent steps.

## 2 Known Technical Gaps of the Instance Refresh Tool

The Instance Refresh tool has some limitations that you must know before using the tool.

- The Instance Refresh tool cannot be used to refresh SAP SuccessFactors Onboarding 1.0. Please contact Technical Support to refresh SAP SuccessFactors Onboarding 1.0.  
When you schedule an instance refresh request where the source instance has SAP SuccessFactors Onboarding 1.0 enabled and the target instance has SAP SuccessFactors Onboarding enabled, the target's SAP SuccessFactors Onboarding 1.0 configuration is replaced with a blank configuration.
- Refresh is supported only when the source and target instances are in the same data center.
- The instance refresh tool doesn't support refreshes from Preview to Production environment during the blackout period for Preview upgrade.
- During an instance refresh, the [Enable Personalized Recommendations](#) setting for Learning is disabled on your refreshed target instance. To ensure learners have access to personalized recommendations, re-enable the setting on your target instance.
- The instance refresh tool doesn't support refreshing the following modules:
  - Recruiting Marketing
  - Workforce Analytics
  - Canvas Reports
  - Open Text
  - Integration Center Jobs
  - Intelligent Service Center
  - OAuth Configurations
  - Employee Central - Timesheet Integration
- SAP SuccessFactors Instance Refresh tool does not support Joule.
  - Only user data, permission data, and configurations are migrated from the source to the target tenant during Instance Refresh.
  - Joule integration settings remain on the source tenant and are not transferred.
  - Ensure that you save necessary user data, permission data, and configurations from the target tenant before the refresh.
  - Reconfigure permissions and run user-related configurations in the target tenant as needed.

### Related Information

[Important Notes while Using the Instance Refresh Tool \[page 6\]](#)

[Things to Know Before Refreshing the Target Instance \[page 14\]](#)

[Post Refresh Activities \[page 36\]](#)

# 3 Refresh Instance in Different Environments

You can perform a refresh for instances that are in different environments.

You can refresh the SAP SuccessFactors HCM suite, SAP SuccessFactors Learning or combination of SAP SuccessFactors HCM suite and SAP SuccessFactors Learning product with:

- Preview as source to Preview as target
- Production as source to Preview as target

## ⓘ Note

The [Enable Instance Refresh Tool for SAP SuccessFactors Learning](#) switch must be enabled for your instance from Provisioning to use this feature.

## → Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

For information on how to manage instances using the Instance Refresh and the Instance Synchronization tools refer to the link in the Related information.

## Related Information

[Known Technical Gaps of the Instance Refresh Tool \[page 4\]](#)

## 4 Important Notes while Using the Instance Refresh Tool

There are some important notes to keep in mind while using the instance refresh tool.

- After refreshing the target instance using the instance refresh tool, it cannot be reverted using the tool.
- Make sure to have enough lead time for activities that you wish to perform after refreshing the target instance. It is recommended to schedule the refresh request at least seven days in advance.
- The Instance Refresh Tool supports source tenants with schema sizes of 650 GB and beyond, thus providing increased efficiency.

### Note

You can find the details of schema size under [Manage Data Storage](#) ► ► [Total Usage](#), and you can calculate the refresh qualified tenant size using the formula Total Usage - (minus) Audit Data.

- Since the refresh activity is a one to one wipe-out of the target instance and replace with the source instance, any customizations present in the target instance are overwritten. These customizations include, but are not limited to:
  - Any existing configurations present only in the target instance (For example, from ongoing implementations or other related activities).
  - Any Configuration Change requests (CCOR) that was only performed in the target instance.
  - Any other configuration only present in the target for testing purposes
- If the instance refresh request for SAP SuccessFactors HCM suite, or SAP SuccessFactors Learning, or a combination of both fails, then the next refresh will be blocked until the failed application is restored to its original state.
- If the source instance has (Single Sign-on) SSO setup and target has Non-SSO setup, make sure that a Non-SSO admin account is maintained in the source instance, before refreshing your target instance. This admin account allows you to access the target instance after refresh, by customer or partner.
- Only Employee Profile Emails and Recruiting Emails are masked as a part of the refresh. This is applicable only if you have populated the [Mask Recruiting Candidate Email Address](#) and [Mask Employee Profile Email Address](#) fields during the submission of the request.
- It is important to take a backup of the setting if Career Site integrated with Identity Authentication Service is configured on your target instance.

### Note

To create a backup of the setting go to [Target > Admin Center > Manage Service Provider Configuration for Identity Authentication Service \(IAS\)](#). Note that post refresh you have to manually revert this in the target instance.

- The tool doesn't support restoration of the URLs under [Provisioning > Company Settings > Enable Employee Central V2 Timesheets](#). If you have this configured in your target instance, save the URL displayed while accessing [Time and Attendance](#) page in the target instance, and open a case with support [LOD-SF-PLT](#) to reconfigure this back in Provisioning.

- The instance refresh tool supports refreshes from the source tenant to the target tenant under the following conditions:
  - Both the source and target tenants were enabled with advanced encryption.
  - Both the source and target tenants were disabled with advanced encryption.
  - The source tenant had advanced encryption disabled while the target tenant had it enabled.
  - The source tenant had advanced encryption enabled while the target tenant had it disabled.
- Audit logs are not copied from the source to target instance post refresh.
- After an instance refresh, the x.509 certificate mapping for regular (non-technical) users needs to be manually re-added in the system. However, for technical users, the system automatically renews the mapping, and no manual intervention is required
- The Instance Refresh tool supports SAP SuccessFactors Generative AI features.
  - Feature role-based permissions and AI Service Administration settings will be reflected in the target system as they are in the source system.
  - An internal job ensures that prompt templates are updated in the target system, especially for newer releases.
  - You may need to manually enable HCM Content Generator or HCM Skills provisioning settings in certain cases.
  - If there is an issue with auto-enablement of the provisioning settings for HCM Content Generator or HCM Skills upon instance refresh, contact Technical Support.

#### → Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

The Instance Refresh process generally transfers SAP SuccessFactors Generative AI configurations and settings to the target system. However, in some specific cases, you may need to manually perform certain tasks to ensure the complete functionality.

- After the Instance Refresh process, the AI-Assisted skills data from the source instance are replicated to the target instance.

## Related Information

[Advanced Encryption](#)

[Things to Know Before Refreshing the Target Instance \[page 14\]](#)

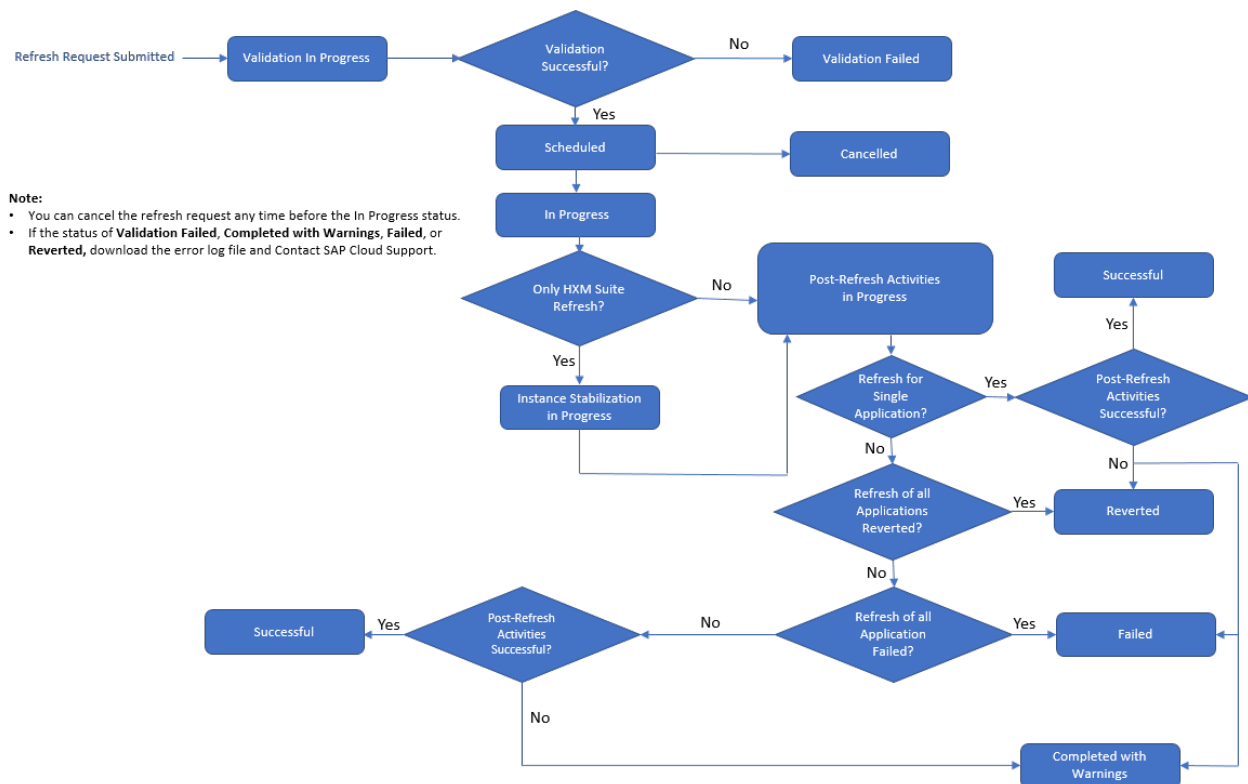
[Post Refresh Activities \[page 36\]](#)



# 5 Instance Refresh Status Workflow

The Instance Refresh status work flow shows the end to end flow of the refresh process.

## Context



To view the simplified version of the workflow in the Instance Refresh tool:

## Procedure

1. Go to [Admin Center](#) > [Instance Refresh](#).
2. Choose [View Status Workflow](#).

## Results

The Instance Refresh Status Workflow appears. The status types are as follows:



Status	Description	Next Step
Scheduled	Displayed when refresh is scheduled for the selected date/time.	NA
Validation in Progress	<p>Displayed when a set of validation checks is being executed to ensure that the refresh can be successfully submitted for execution. Some of the parameters that are validated on the source and target instances are:</p> <ul style="list-style-type: none"> <li>• Missing features in target instance like Generic Objects and Instance Refresh.</li> <li>• Duplication of refresh request on same target instance by multiple source instances.</li> <li>• Target instance release version compatibility with the source instance release version.</li> <li>• Schema size of the source and target instance.</li> </ul>	NA
Validation Failed	Displayed when the validation check fails, and the refresh could not be submitted.	Download the error log file and contact SAP Cloud Support with the log file.
In Progress	<p>Displayed when the refresh execution is in progress.</p> <div> <p><b>Note</b></p> <p>It is not recommended to access the target instance when the refresh is in the <i>In Progress</i> status until the status is <i>Completed</i> on the scheduled date.</p> </div>	NA
Successful	Displayed when the target instance is refreshed successfully.	NA
Completed with Errors	<p>Displayed when the refresh is scheduled for more than one product in the same request and the refresh fails or reverts for one of the products.</p> <div> <p><b>Example</b></p> <p>If you try to refresh SAP SuccessFactors <i>Learning</i> and <i>HCM Suite</i> and one of the refresh conditions occur:</p> <ul style="list-style-type: none"> <li>• <i>HCM Suite</i> successful and SAP SuccessFactors <i>Learning</i> fails.</li> <li>• <i>HCM Suite</i> fails and SAP SuccessFactors <i>Learning</i> successful</li> <li>• <i>HCM Suite</i> reverted and SAP SuccessFactors <i>Learning</i> successful</li> </ul> </div> <div> <p><b>Note</b></p> <p>The <i>Enable Instance Refresh Tool for SAP SuccessFactors Learning</i> switch must be enabled for your instance from Provisioning to use this feature.</p> </div> <div> <p><b>Remember</b></p> <p>As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.</p> </div>	Download the error log file and contact SAP Cloud Support with the log file.

Status	Description	Next Step
Completed with Warnings	<p>Displayed when one or more of the conditions occur during the refresh:</p> <ul style="list-style-type: none"> <li>Rebuilding of indexes fails, this failure can slow down the search process.</li> <li>Masking the internal users with provided input parameter are successful, while creating the refresh request fails. This failure can result in sending emails to real users with reference to test job executions.</li> <li>Traces of audit logs are present in the target instance from the source instance after refresh is complete. These logs might appear in your audit reports and the target instance functions as expected.</li> </ul>	Download the error log file and contact SAP Cloud Support with the log file.
Instance Stabilization in Progress	<p>Displayed when the basic refresh on your target instance is complete and one or more of the following activities are being performed:</p> <ul style="list-style-type: none"> <li>Deleting the NoSQL data. This activity is to avoid inconsistencies in audit logs and data.</li> <li>Deleting the audit logs. This activity is to avoid inconsistencies in audit logs and data.</li> <li>Rebuilding of the Solr indexes. This activity is to improve the search process in your target instance.</li> <li>Masking the internal users email ID. This activity is to avoid sending emails to real users in your target instance with reference to test job executions.</li> </ul> <div> <p><b>Note</b></p> <p>Failure of any one of the activities can result in changing the status of Instance Refresh request to Completed with Warning. If all the activities are completed without a failure then the request is Successful.</p> </div>	NA
Failed	<p>Displayed when one of these conditions occurs:</p> <ul style="list-style-type: none"> <li>The target instance refresh fails.</li> <li>The target instance is not fully refreshed or reverted.</li> <li>The target instance is down.</li> </ul>	Download the error log file and contact SAP Cloud Support with the log file.
Reverted	Displayed when the refresh did not execute successfully. In this case, there is no change in target instance data and configuration.	Download the error log file and contact SAP Cloud Support with the log file.
Canceled	<p>Displayed when you cancel the instance refresh request.</p> <div> <p><b>Note</b></p> <p>You can cancel the request only when the status of the request is <i>Scheduled</i> or <i>Validation In Progress</i>.</p> </div>	NA
Post-Refresh Activities in Progress	<p>Displayed when a user sync job is triggered to sync the user data between <i>HCM Suite</i> and SAP SuccessFactors Learning.</p> <p>The user sync jobs are triggered when you select:</p>	NA

Status	Description	Next Step
	<ul style="list-style-type: none"> <li>Only <a href="#">HCM Suite</a></li> <li>Only <b>SAP SuccessFactors Learning</b></li> <li>A combination of both <b>HCM Suite</b> and <b>SAP SuccessFactors Learning</b>, provided <a href="#">Anonymize Rest of the Sensitive Fields</a> checkbox is selected.</li> </ul> <div> <p><b>Note</b></p> <p>If you select <b>HCM Suite</b> and <b>SAP SuccessFactors Learning</b> for refresh without selecting <a href="#">Anonymize Rest of the Sensitive Fields</a>, the user sync fails.</p> </div>	

An email notification is sent to you on every status change of the instance refresh request. The notification is sent to the email ID saved in the contact information for business on the Employee Profile page. To check the contact information, in your source instance go to ► [People Profile](#) ► [Contact Details](#) ►.

As a pre-validation check, we've integrated [Check Tool](#) in the email notifications. The email notification displays the result of the checks that were last run using the [Check Tool](#).

#### **Note**

We recommend that you run the checks using [Check Tool](#) just before you submit an instance refresh request and fix the errors and problems in the source instance to avoid replicating the same issues in the target instance, post refresh.

# 6 Knowing Your Company's Refresh Entitlement

You can view your company's entitled refreshes including the number of completed, scheduled, and remaining refreshes.

## Prerequisites

Make sure either the [View Refresh Requests](#) or the [Manage Refresh](#) permission is enabled.

## Context

Every company is entitled to two refreshes per tenant for a calendar year. For example, if your company has five tenants including production and non-production tenants, then every year your company is entitled to get 10 refreshes as a part of the standard purchase.

SAP SuccessFactors Implementation Partners have their own tenants and can perform refreshes from their own refresh entitlement quota. For Implementation partner resellers, the entitled refreshes are calculated for their customers based on the number of tenants the customers have. When Implementation Partners perform refreshes from their tenant into customer tenants, the refresh entitlement is counted towards the customer's entitlement quota.

Let us consider an example where an Implementation Partner has 5 tenants of their own and 10 tenants from 3 different customers (Customer1 has 3 tenants, Customer2 has 3 tenants, and Customer3 has 4 tenants). Totally, Implementation Partner has 15 tenants in their ecosystem.

Implementation Partners are entitled to do 10 refreshes per calendar year. Their customers are entitled based on the number of tenants they have. Considering the above example: Customer1 is entitled to 6 refreshes per calendar year, Customer2 is entitled to 6 refreshes per calendar year, and Customer3 is entitled to 8 refreshes per calendar year.

### ⓘ Note

[Refresh Entitlement](#) is application only for SAP SuccessFactors HCM suite refreshes and only for the refreshes that are triggered using the instance refresh self-service tool.

## Procedure

1. Go to [Admin Center](#).

2. In the *Tools Search* field, enter *Instance Refresh*. Access the tool by clicking on the search result.  
The *Instance Management* page appears with the *Full Copy (Instance Refresh)* option selected.
3. Choose *Next*.
4. Choose *View Refresh Entitlement*.

## Results

After selecting *View Refresh Entitlement* button, you can see:

- *Total*: Gives a count of the total number of refreshes allocated to your company.
- *Completed*: Gives a count of all refreshes that are completed while using the self-service Instance Refresh tool, with status *Successful* and *Completed with warning*. This includes refreshing only SAP SuccessFactors HCM suite, or a combination of both SAP SuccessFactors HCM suite and SAP SuccessFactors Learning product.
- *Remaining*: Gives a count of all the remaining refreshes after successful refreshes.
- *Scheduled*: Gives a count of all the refreshes that are currently scheduled in your instance.

### → Remember

- You can't carry forward any unused refreshes from the current year to the next or subsequent years.
- There's no restriction on the refreshed tenants. For example, all 10 refreshes could be used to refresh the same target instance.
- You can't refresh your instance after you've exhausted your limit of the entitled refreshes.
- You can't view Scheduled Refresh Count for SAP SuccessFactors Learning.

# 7 Things to Know Before Refreshing the Target Instance

Before you refresh any target instance, you must know certain points that can impact your target instance.

## Things to Know Before Refreshing the Target Instance

Product	Things to Know Before Refreshing the Target Instance
Integration Center	<ul style="list-style-type: none"><li>• All integrations defined in Integration Center are copied from source to target instance.</li><li>• Existing scheduled jobs related to Integration Center are deleted.</li><li>• <a href="#">Destination Settings</a> and <a href="#">Source Settings</a> configurations of <a href="#">Integration Center</a> are not copied to the target instance after refresh.</li><li>• Integration Center does not copy Security Center artifacts from source to the target instance to avoid inconsistency or corruption of data during instance refresh. Security Center artifacts related to target instance will be restored after instance refresh.</li></ul>
Integration Service Registration Center	Subscriptions in <a href="#">Event Subscription Management</a> or <a href="#">ISC – Event Connector</a> might be absent in the target company after an instance refresh. Configurations in <a href="#">Integration Service Registration Center</a> might be absent in the target company after an instance refresh. In such scenarios, create the subscriptions manually using the corresponding views. If a significant number of subscriptions are missing, reach out to Support at LOD-SF-INT-INC-FWK.
Onboarding	<ul style="list-style-type: none"><li>• Documents in the Print Forms Service (PFS) are not copied to the target instance.</li><li>• DocuSign Configuration is not copied to target instance after refresh. Make a note of DocuSign account ID and the associated email address.</li><li>• Process definition for Onboarding /Offboarding is not copied to your target instance.</li><li>• If the target instance has Onboarding and source instance has Onboarding 1.0, then post refresh, the target instance's configurations are overwritten with the source instance's configurations.</li></ul>

### Note

Before refreshing an instance having Onboarding integrated with SAP SuccessFactors HCM suite, make sure that the [ReportID](#) set for [Ad Hoc Reports Export](#) jobs are existing in both the source and target instances.

The report IDs required are:

- Onboarding User Sync
- Onboarding Permission Sync

These report IDs are required as a part of job configuration in Provisioning. For more information on scheduling an Ad Hoc Reports Export job, see **KBA 2193439** in the **Related Information** section.

Ad Hoc reports are included for the SAP SuccessFactors HCM suite product refreshes, hence if the report is only existing in the target instance and not in source, the reports are deleted after refresh.

Product	Things to Know Before Refreshing the Target Instance
Mobile	<ol style="list-style-type: none"> <li>1. For any change in the application data, for example, org changes, it might take up to 1 day for the changes to be visible.</li> <li>2. Post refresh, if there are any new users added in the target instance, then the new users must activate the device to use the SAP SuccessFactors application.</li> </ol>



## Learning

- Quick guide images, Company logos, and Custom thumbnails are not restored. Take a backup of these files, to restore it in the target instance after refresh.
- Custom labels, custom pages, or reports unique to the target instance are not restored. Export the labels, pages and reports, to restore it in the target instance after refresh.
- All configuration property files in [System Administration > Configuration > System Configuration](#) of the target system are restored.

### Note

Post refresh, if you encounter issues with AI-assisted capabilities, we recommend disabling and enabling the following configuration properties:

- AI-assisted skill association for Open Content Network items:  
`defaultValues.aiAssistedSkillAssociationEnabled[default]` (► [System Administration > System Configuration > OPEN CONTENT NETWORK](#) ►).
- AI-assisted skill inference for learning items: `enableSkillInference`  
(► [System Administration > System Configuration > LMS\\_ADMIN](#) ►).

- All the queued up notification emails from Learning are cleared.
- All the archived emails are deleted.
- All the email addresses are cleared so that erroneous emails are no sent out.
- [Automatic Process Management](#) (APM) or Recurring Report Jobs will be disabled. After performing the refresh, you can re-enable all previously enabled jobs copied from the source instance. This can be achieved through the Learning Administration page, specifically under [System Administration > Configuration > Global Application Settings > Instance Refresh](#). You can re-enable these jobs within a period of up to fourteen days after the database refresh.
- The one-time jobs scheduled in the source are copied to the target instance and assigned the scheduled status.
- Email notification is disabled.
- Post refresh, Virtual Learning Systems (VLS) events are removed from the target instance. You need to create VLS events again.
- Post refresh, [Configuration > Content Deployment Locations, Entity Configuration, External Learning Request](#) and [VLS Configuration](#) are restored from the target instance.
- Post refresh, VLS instructor mapping data is restored from the target instance only if the instructor exists.
- Post refresh, if the Learning Target System is integrated with Identity Authentication and Identity Provisioning Services (initiated or activated),
  - All Sites copied from source are created as an application in Identity Authentication Service and the corresponding Learning Site, SAP Identity Service Application ID is updated.
  - The Global User ID is cleared.
  - If only SAP SuccessFactors Learning is selected as a Product to Refresh, then post refresh all User under User Source System values are cleared and the User Identification Process is initiated and the SuccessFactors User Connector is run.
- If you selected Learning as a Product to Refresh and the Learning Target System is integrated with Identity Authentication and Identity Provisioning Services (initiated or activated),

	<ul style="list-style-type: none"> <li>Go to <a href="#">SAP Cloud Identity Services</a> &gt; <a href="#">Identity Provisioning</a> . Under the target system go to <a href="#">Identity Authentication</a> &gt; <a href="#">Transformation Rule</a> and set <i>sendMail</i> to false to prevent sending email notifications to a dummy email address which may hinder email server performance.</li> <li>Decide on the approach for maintaining parity between the Learning Site and the Identity Authentication Application. When performing a refresh, a new Identity Authentication application is generated for each Site refreshed from the source. However, Identity Authentication applications corresponding to Sites from the previous target configuration are not removed. If you wish to reference the configuration for Sites created by the refresh, you have the option to manually remove Identity Authentication applications corresponding to the pre-refresh target Sites. Another option is to delete the Sites in the target configuration before the refresh, which will also eliminate the corresponding Identity Authentication Application</li> </ul>
Goal Management	If the latest version of Goal Management is enabled in the source instance, then after instance refresh, the same version is enabled in the target instance and cannot be reverted to the legacy version.
Platform	<p>If legacy picklists are not migrated to MDF picklists in the source system but are migrated in the target system, then post refresh, the migrated picklists in the target is overwritten with the legacy pick lists. To avoid overwrite, you can cancel the scheduled refresh. Please inform Technical Support that the source and target instances have different type of picklist by creating a support ticket to get guidance on the next steps.</p> <p>Administrators can choose to either retain or clear the Global User ID during data replication to a target instance. Retaining the Global User ID, especially when source and target share an Identity Authentication Service (IAS), reduces the time and effort required for an initial full user data synchronization.</p>

## Product

## Things to Know Before Refreshing the Target Instance

### People Analytics

- Table Reports, Spreadsheet, Dashboard, Pixel Perfect Talent Card (PPTC), Classic Reports, and List Views can be refreshed using the Instance Refresh Tool.
- Stories in People Analytics aren't copied from the source instance to the target instance during the Instance Refresh. However, if the target instance has Stories in People Analytics, then the connection will be retained and post-refresh all the stories will exist under All Reports.

#### Note

If the source instance has Stories in People Analytics enabled and the target instance doesn't, then post-refresh you have to manually enable Stories in the target instance.

- Ensure you have added the following property in IPS - SAP Analytics Cloud target system:

Name	Value
ips.delete.existedbefore.entities	true

- Ensure you don't change any IPS properties or transformations in the IPS source or target systems.
- Don't invoke IPS Reset in either the IPS source or target systems, as doing so erases all user's contexts. Losing user's contexts in IPS, skips user delete operations from the SAP Analytics Cloud target.
- Advanced Reporting in Employee Central is not supported via Instance Refresh Tool. Either you can perform or request the Customer Support to place an Advanced Reporting Metadata refresh.
- Canvas Reports and Workforce Analytics are not supported by the Instance Refresh tool. It is important that you specify that Canvas Reports and Workforce Analytics are implemented in your target instance. This is to ensure that post-refresh, the connection to Canvas Reports and Workforce Analytics are re-established in the target instance.

## Related Information

[Scheduling an Ad Hoc Reports Export Job](#)

[How to Update the ECP Target System in SAP SuccessFactors](#)

[Attachments are empty post refresh](#)

[Multiple Learning Application Entries in Identity Authentication](#)

[Quick Guide to Enable People Analytics Report](#)

[People Analytics not Working After Instance Refresh](#)

[User Identification Process](#)

[Site Migration](#)

[SAP SuccessFactors Learning and SAP Cloud Identity Services Integration Overview](#)

SAP Note 3466216 

## 8 Pairing the Source Tenant to the Target Tenant in Instance Refresh

Before refreshing your target instance, you must pair your target instance with the source instance. The pairing is a one-time task with a three-step process.

### Prerequisites

- Identify the source and the target tenants in each pairing relationship.
- Enable the following permissions:
  - [Manage Refresh](#)
  - [Admin access to MDF OData API](#)
  - [Manage Integration Tools](#)
  - [Manage Business Process Engine](#)
  - [Enable Generic Object](#)

### Procedure

1. On the source instance, go to [Admin Center](#).
2. In the [Tools Search](#) field, enter [Instance Refresh](#).

The [Instance Management](#) page appears with the [Full Copy \(Instance Refresh\)](#) option chosen.

3. Choose [Next](#).

The [Instance Refresh Center](#) page appears.

4. Choose [Create New Request](#).

The [Create Instance Refresh Request](#) page appears.

5. Choose [Add New Pair](#).

[Instance Pair Wizard](#) opens with the [Select Target Details](#) step active on it.

6. Select the target data center and target environment.
7. Enter the target Company ID.


#### Note

To know your target instance company ID, go to Source Instance > User ID on the global header of your instance > Show Version Information.

8. Choose [Generate Token](#).  
An authentication token is sent to the target company ID.

#### Note

The generated token is valid only for one hour from the time it has been generated. If the token expires, you must regenerate the authentication token again.

9. Go to target instance and access the [Instance Refresh](#) page.
10. Click the  [Copy](#) icon under the [Copy Token](#) column, for the corresponding source instance, from which authentication token was generated.
11. On the source tenant, go to [Admin Center > Instance Refresh Page > Create New Request > Add New Pair](#).
12. Choose the target instance from which the authentication token was copied.
13. Choose the link at the bottom of the [Get Authentication Token](#) step which is active on the [Instance Pair Wizard](#).
14. Paste the token in the [Authentication Token](#) text box.
15. Choose [Validate](#).

#### Note

If the token is invalid or has expired, an error occurs and you must generate a new token to pair the tenants.

## Results

Pairing the target instance with the source instance is successful. You can now find the target instance details in **Create Instance Refresh Request** page to refresh the target instance from your source instance.

## Related Information

[Creating an Instance Refresh Request \[page 22\]](#)

# 9 Creating an Instance Refresh Request

Allows you to request a new instance refresh from a source instance on a selected target instance.

## Prerequisites

- Make sure you have enabled the following permissions:
  - [Manage Refresh](#)
  - [Admin access to MDF OData API](#)
  - [Manage Integration Tools](#)
  - [Manage Business Process Engine](#)
  - [Enable Generic Object](#)
- Both the source and target instances must be present in the same data center.
- Ensure that there is no ongoing implementation changes being performed in your target instance by either one of the following:
  - Your own internal implementation teams
  - Third-party partners and/or consultants
  - The SAP-SuccessFactors professional services team

### ⚠ Caution

Once the instance refresh is complete, you can't revert the changes in the target instance.

## Procedure

1. On the source instance, go to [Admin Center](#).
2. In the [Tools Search](#) field, enter [Instance Refresh](#).

The [Instance Management](#) page appears with the [Full Copy \(Instance Refresh\)](#) option chosen.

3. Choose [Next](#).

The [Instance Refresh Center](#) page appears.

4. Choose [Create New Request](#).

[Terms and Conditions](#) page appears.

5. Choose [Accept](#) after reading the conditions, to create a new instance refresh request.

### 📘 Note

The source instance information like, data center, environment, company ID are auto populated in the [Create Instance Refresh Request](#) page.



6. Choose the data center of the target instance from the [Target Datacenter](#) dropdown list.

#### Note

If you do not find any of your target information like data center, environment, or company ID for selection you must pair your target instance with the logged in source instance.

7. Choose the environment of the target instance from the [Target Environment](#) drop-down list.
8. Choose the company ID of the target instance from the [Target Company ID](#) drop-down list.

#### Note

- Instance Refresh using the self-service tool is not supported if the [Target Company ID](#) is a productive tenant. The validation check fails and the instance refresh request is not submitted. You receive an email notification with the status [Validation Failed](#). This is applicable when you refresh only SAP SuccessFactors HCM suite product.

9. Choose the products to be refreshed from [Products to Refresh](#).
  - If you choose to refresh only SAP SuccessFactors Learning, then set the [Refresh Schedule Date](#).
  - If you choose to refresh either SAP SuccessFactors HCM Core, or a combination of SAP SuccessFactors HCM Core and SAP SuccessFactors Learning then,
    - Set the [Refresh Schedule Date](#).  
You can schedule instance refresh requests up to 182 days in advance, so that there are enough slots available to place an instance refresh request. Target instance refreshes can be scheduled throughout the year, including weekends, excluding the planned downtime periods. Additionally, 2 PM time slots have been enabled for refreshes of non-production tenants.

#### Note

If your desired schedule date is unavailable, please select another available date for it.

- Enter an email ID in the [Mask Recruiting Candidates Email Address](#) text box, to overwrite or mask the external candidates email address in the target instance with the email address of your choice.

#### Note

Masking email ID of external or internal candidates is possible only when the source instance is enabled with SAP SuccessFactors Recruiting feature.

- [Optional](#): Enter an email ID in the [Mask Employee Profile Email Address](#) text box, to overwrite or mask the Employee Profile email address in the target instance with the email address of your choice.
- [Do not delete global user IDs](#): When you select this option, the system keeps global user IDs during the instance refresh. If you don't select it, the system deletes the global user IDs. This option is unchecked by default.
- To mask personally identifiable information apart from email addresses of employee profiles and recruiting candidates, choose [Anonymize Sensitive Information](#).

Data Anonymization Option	Description
<a href="#">Do Not Anonymize</a>	Select the option when you don't want any fields to be anonymized in the target instance after you submit a

Data Anonymization Option	Description
	new instance refresh request from a source instance on a selected target instance.
<a href="#">Anonymize All Supported Fields</a>	Select the option when you want to anonymize all fields in the target instance after you submit a new instance refresh request from a source instance on a selected target instance.
<a href="#">Anonymize Selective Fields</a>	<p>Select this option when you want to anonymize selected fields in the target instance after you submit a new instance refresh request from a source instance on a selected target instance.</p> <p>Choose <a href="#">Download Template</a> to manually mark the anonymization of fields and upload the template in <a href="#">Customized Sensitive Information</a>. You can also use an existing template.</p>

### ⚠ Caution

Once the anonymization is performed it can't be reverted back to non-anonymization.

#### 10. Choose [Submit](#).

The basic refresh of your target instance will be completed in a couple of hours. In addition to this, depending on your company's data volume, instance stabilization activities like deleting the NoSQL data, deleting the audit logs, rebuilding of the solr indexes, and so on can take longer duration.

### 📌 Note

If your instance exceeds the threshold limit, you can contact SAP Cloud Support for completing the refresh request.

If you encounter an error while submitting the refresh request, try submitting it for individual products. If you are still unable to submit the refresh for an individual product, please contact SAP Cloud Support.

A pop-up message appears stating refresh has been successfully scheduled.

## Results

The status of the instance refresh request appears in the [Overview](#) page.

The details of the instance refresh request that you can find in the [Overview](#) tab are:


Scheduled Date	The scheduled date for the refresh of the target instance.
Completed Date	The date when the refresh is completed.
Refresh Status	The current status of the refresh request.
Target Info	The company ID of target that is being refreshed.

Products Refreshed	The products chosen to be refreshed.
Requested By	The user ID of the person who has requested the refresh. To view their details choose the business card icon.

**Note**

The Business Card icon is displayed only when you have the [Manage User](#) permission. For details on the permission, see **List of Role-Based Permission** in **Related Information** section.

## Next Steps

To check the status of the instance refresh request click the  *question mark* icon button under the [Refresh Status](#) column for the identified instance refresh request. The [Refresh Status Information](#) window appears with the error list.

## Related Information

[Pairing the Source Tenant to the Target Tenant in Instance Refresh \[page 20\]](#)  
[Instance Refresh Data Anonymization Fields \[page 29\]](#)

# 10 Approving Production Tenant Refresh

You can refresh your production tenant during the implementation phase, prior to deployment with necessary approvals from the administrator.

## Prerequisites

- Ensure that both the source and target instances must be present in the same data center.
- The source and the target tenants are paired.
- Ensure that you can select the production tenant in the target tenant drop down when submitting a refresh request.
- You have the ► [Administrator](#) ► [Approve Production Tenant Refresh Request](#) ► permission to approve the refresh request. Administrators with this new role based permission can only approve refreshes for live production tenants.
- You have enabled the [Manage Refresh](#) and [View Refresh Requests](#) permission to trigger and view the refreshes respectively.
- You must open a ticket or incident (using the component LOD-SF-PLT-CGC) requesting to enable the ► [Admin Center](#) ► [Manage Permission Roles](#) ► [Edit Role for SuperAdmin](#) ► [Manage Instance Refresh](#) ► [Approve Production Tenant Refresh Request](#) ► option in your instance. For further assistance, contact Technical Support.

## Context

Production tenant refreshes are irreversible and requires approval from an administrator. We've introduced two levels of approvals to schedule the refresh request. Administrators with Instance Refresh Tool (IRT) refresh permissions can choose a production tenant as the refresh target and configure additional options such as the refresh date and data anonymization before submitting their request. After each refresh, SAP will disable the refresh functionality to protect production tenant data and prevent accidental refreshes.

### ❗ Note

You must initiate a manual refresh for SAP SuccessFactors instances with Learning Management System (LMS) integration.

## Procedure

1. Go to ► [Admin Center](#) ► [Instance Refresh Center](#) ► [Create New Request](#) ► [Create Instance Refresh Request](#) ► page.

2. Enter the required source tenant and target tenant information in the [Create Instance Refresh Request](#) page. If you select a production tenant as the target tenant, a message pop up appears asking whether you want to proceed.

#### ⓘ Note

If you select and proceed with the refresh of your production tenant as the target tenant result in the complete and irreversible deletion of all data, including transactional data, general audit, read audit, and change audit logs, as well as configurations within the production tenant. This action is irreversible.

3. Click [Submit](#), if you want to proceed with the refresh.  
If you proceed with Submit, then the initial [Refresh Status](#) in [Instance Refresh Center](#) page is set to [Pending Approval](#).

#### ⓘ Note

The refresh request is canceled if it is not approved within 24 hours of the scheduled date.

A pop up message appears, requesting you to select the [Acknowledgment and Acceptance](#). Click [Ok](#) to proceed.

4. Click on [Refresh Status](#) to see the refresh status information as a pop up.  
The list of designated reviewers with the [Approve Production Tenant Refresh Request](#) permission appears in the [Refresh Status Information](#) pop up.
5. Click the ellipsis button under the [Action](#) column for the identified instance refresh request, and then click [Approve](#) or [Reject](#).  
When you select [Approve](#), a [Production Tenant Refresh Request Requires Review](#) pop up appears.

#### ⓘ Note

Click [Submit](#) on the pop up after you acknowledge and agree to proceed with the production tenant refresh. After submission, the [Refresh Status](#) appears as [Validation In Progress](#) in the [Refresh Status](#) column.

## Related Information

[Creating an Instance Refresh Request \[page 22\]](#)

# 11 Deleting an Instance Pair

Remove invalid instance pairs using the [Delete Pair](#) option.

## Procedure

1. On the source instance, go to [Admin Center](#).
2. In the [Tools Search](#) field, enter [Instance Refresh](#).

The [Instance Management](#) page appears with the [Full Copy \(Instance Refresh\)](#) option chosen.

3. Choose [Next](#).
4. Choose [Create New Request](#).

The [Create Instance Refresh Request](#) page appears.

5. Choose [Delete Pair](#) and delete the invalid pairs from the [Instance Pair Wizard](#).

### Note

If the refresh status is [In Progress](#), [Validation in Progress](#), [Post Refresh Activities in Progress](#), [Scheduled](#), or [Instance Stabilization in Progress](#), deletion will not occur.

## 12 Instance Refresh Data Anonymization Fields

Know the generic names of all the fields that are anonymized in the refreshed target instance.

Data anonymization is a type of information sanitization with the intent of privacy protection. It is a process of either encrypting or removing personally identifiable information from data sets, so that the people whom the data describe remains anonymous.

You can anonymize data in your target instance using Instance Refresh. There are different types of anonymizing your data. The types used in Instance Refresh are:

- **Deterministic Anonymization**, in this type of anonymization, the actual value is replaced with any alphanumeric value in the target instance. For example, If **Place of Birth** is **London**, it can be anonymized as **12E3RT**. If the **Nationality** is **Indian**, it can be anonymized as **258935**.
- **Fixed Value**, in this type of anonymization, the actual value is replaced with a predefined value in the target instance. For example, If **Email ID** is **margaret.george@sap.com**, it is anonymized to **dummy@successfactors.com**. If **Address1**, **Address2**, and **Address3** is **91 Talbot Street, San Lorenzo, CA 94580**, it is anonymized as **address1, address2, address3**.
- **Null Value**, in this type of anonymization, the actual value is replaced with a blank in the target instance. For example, the photo of a user is anonymized by keeping it empty in the target instance.
- **Random Date** In this type of anonymization, the actual date is replaced with a random date. For example, if **Date of Birth** is **22-Oct-84**, it can be anonymized with some other random date as **14-Nov-79**.
- **Random Gender**, in this type of anonymization, the gender is anonymized as Male in the target instance irrespective of any gender value in the source instance. For example, If the **Gender** is **Female**, it is anonymized as **Male**. If the **Gender** is **Male**, it is still anonymized as **Male** in the target instance.
- **Randomize**, in this type of anonymization, any value related to compensation or Benefit rate is anonymized to a random numeric value. For example, if the employee compensation is **45** it can be anonymized to **23**.
- **Randomize Percentage**, in this type of anonymization, the value related the Employee direct deposit amount is anonymized to value range from **0** to **100** in the target instance. For example, if the employee direct deposit amount is **450000** it can be anonymized as **100**.
- **Based on User Key**, in this type of anonymization some of the user management fields are anonymized with the fixed or null type. The fields are:
  - Address fields, where any value in the fields **ADDR1**, **ADDR2**, and **ADDR3** are anonymized with the value **address1**, **address2**, and **address3** respectively.
  - Email ID, where any value in the field is anonymized with the value **dummy@successfactors.com**.
  - Gender, irrespective of any gender (Male or Female) in the field is anonymized with the value **Male**.
  - Business phone number and Fax number, is anonymized to any other random number.
- **Shuffling Column Values**, in this type of anonymization, the actual value of a user in a table can take the value of some other user from the same column. See the example table before and after anonymization:

Before Anonymization

User ID	First Name	Last Name	Middle Name
1234	Marko	Debric	Veljko



User ID	First Name	Last Name	Middle Name
1235	Stevan	Vesiljevic	Slobodan
1236	Milica	Atlagic	Zdravko
1237	Jelena	Polinger	Misa

After Anonymization

User ID	First Name	Last Name	Middle Name
1234	Milica	Polinger	Zdravko
1235	Jelena	Atlagic	Misa
1236	Marko	Vesiljevic	Veljko
1237	Stevan	Debric	Slobodan

The table lists all the fields with the generic name that are anonymized for the Recruiting Management, Employee Central and, User Management fields.

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
User Management	User ID   First Name   Last Name   Middle Name	User ID   First Name   Last Name   Middle Name	Shuffling Column Values	
User Management	User ID   First Name   Last Name   Middle Name	Display Name	Deterministic Anonymization	
User Management	Email	Email	Fixed or Null	<a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a>
User Management	Gender	Gender	Random Gender	
User Management	Nickname	Nickname	Deterministic Anonymization	
User Management	Suffix	Suffix	Deterministic Anonymization	
User Management	Address1   Address2   Address3	Address	Fixed or Null	Address 1, Address 2, and Address 3
User Management	SSN   Date of Birth	SSN   DOB	Deterministic Anonymization	
User Management	Business Phone   Business Fax	Phone	Deterministic Anonymization	
User Management	Photo	Photo	Null	
Employee Central	Actor	Actor	Fixed Value	<a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a>
Employee Central	Role ID	Role ID	Fixed Value	<a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a>
Employee Central	Date of Birth   Date of Death   Married Since	Date of Birth   Date of Death   Married Since	Random Date	

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
Employee Central	Address Info	Address<1-20>	Fixed or Null	Address 1, Address 2, and Address 3. All other address fields have null value.
Employee Central	Address Info	Address<1-20>_alt1	Null	
Employee Central	Address Info	Address<1-20>_alt2	Null	
Employee Central	Address Info	Notes	Null	
Employee Central	Email	Emergency Contact Email	Fixed or Null	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .
Employee Central	Email	Is Dependent	Fixed Value	If the value is present, then it is updated to 0 (zero).
Employee Central	Email	Is Address Same as Employee	Fixed Value	If the value is present, then it is updated to 0 (zero).
Employee Central	COMPA_RATIO	Is Highly Compensated Employee	Fixed Value	0
Employee Central	COMPA_RATIO	Benefits Rate	Randomize	
Employee Central	COMPA_RATIO	COMPA_RATIO	Fixed Value	0
Employee Central	PERSONAL_INFO	Gender	Random Gender	
Employee Central	PERSONAL_INFO	DOB	Randomize	
Employee Central	PERSONAL_INFO	Date of Death	Randomize	
Employee Central	PERSONAL_INFO	First Name	Shuffling Column Values	
Employee Central	PERSONAL_INFO	Last Name	Shuffling Column Values	
Employee Central	PERSONAL_INFO	Middle Name	Shuffling Column Values	
Employee Central	PERSONAL_INFO	Display Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Formal Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	DISPLAY_NAME_ALT1	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	DISPLAY_NAME_ALT2	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	FORMAL_NAME_ALT1	Deterministic Anonymization	

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
Employee Central	PERSONAL_INFO	FORMAL_NAME_ALT2	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Preferred Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Second Last Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Partner Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Partner Name Prefix	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	LAST_NAME_ALT1	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Birth Name	Deterministic Anonymization	
Employee Central	PERSONAL_INFO	Initials	Deterministic Anonymization	
Employee Central	EMAIL_ADDRESS	EMAIL_ADDRESS	Fixed Value	<a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a>
Employee Central	EMP_PAYCOMP: AMOUNT	EMP_PAYCOMP_RECURRING: AMOUNT	Randomize	
Employee Central	EMP_PAYCOMP: AMOUNT	EMP_PAYCOMP_NON_RECURRING: AMOUNT	Randomize	
Employee Central	EMP_PAYCOMP: PERCENT	EMP_PAYCOMP_RECURRING: PERCENT	Randomize	
Employee Central	EMP_PAYCOMP: PERCENT	EMP_PAYCOMP_NON_RECURRING: PERCENT	Randomize	
Employee Central	EMP_PAYCOMP: NUMBER	EMP_PAYCOMP_RECURRING: NUMBER	Randomize	
Employee Central	EMP_PAYCOMP: NUMBER	EMP_PAYCOMP_NON_RECURRING: NUMBER	Randomize	
Employee Central	PLACE_OF_BIRTH	PLACE_OF_BIRTH	Deterministic Anonymization	
Employee Central	Phone	Phone Number	Deterministic Anonymization	
Employee Central	Phone	Primary Phone Number	Deterministic Anonymization	
Employee Central	Phone	Secondary Phone Number	Deterministic Anonymization	

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
Employee Central	Suffix	Suffix	Deterministic Anonymization	
Employee Central	ACCOUNT_NUMBER	ACCOUNT_NUMBER	Deterministic Anonymization	
Employee Central	JOB_TITLE	Job Title	Deterministic Anonymization	
Employee Central	Extension	Extension	Fixed Value	0123
Employee Central	IM_INFO	IM_ID	Deterministic Anonymization	
Employee Central	IM_INFO	URL	NULL	
Employee Central	Amount	Amount	Randomize Percentage	
Employee Central	EMP_JOB_INFO	Pay Grade	Null	
Employee Central	EMP_JOB_INFO	Sick Pay Supplement	Null	
Employee Central	EMP_JOB_INFO	Continued Sickness Pay Period	Null	
Employee Central	EMP_JOB_INFO	Contract End Date	Fixed Value	07-07-2025
Employee Central	EMP_JOB_INFO	Continuous Sickness Pay Measure	Null	
Employee Central	EMP_JOB_INFO	Pension Protection	Fixed Value	0
Employee Central	EMP_JOB_INFO	Teachers Pension	Fixed Value	0
Employee Central	EMP_JOB_INFO	CALC_METHOD_INDICATOR	Fixed Value	0
Employee Central	EMP_JOB_INFO	PERMIT_INDICATOR	Null	
Employee Central	EMP_JOB_INFO	PCFM	Null	
Employee Central	EMP_JOB_INFO	FGTS_OPTANT	Null	
Employee Central	EMP_JOB_INFO	FGTS_DATE	Null	
Employee Central	EMP_JOB_INFO	FGTS_PERCENT	Null	
Employee Central	EMP_JOB_INFO	TUPE Organization Number	Null	
Employee Central	National ID	National ID	Deterministic Anonymization	
Employee Central	CALCULATED_AMOUNT	CALCULATED_AMOUNT	Fixed Value	0
Recruiting	Candidate Email Post Conversion	RCM Candidate Profile Conversion	Fixed Value	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
Recruiting	Candidate Email	RCM Candidate Email Address	Fixed or Null	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .
Recruiting	Personal Information	RCM Application Candidate Info	Deterministic Anonymization	
Recruiting	Candidate Name	RCM Candidate Name	Shuffling Column Values	
Recruiting	Candidate LinkedIn Information	RCM Candidate LinkedIn	Null	
Recruiting	Offer Information	RCM Offer Detail Info	Fixed or Null	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .
Recruiting	Agency Email	RCM Agency Info	Fixed or Null	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .
Recruiting	Agency Recruiter Name	RCM External Recruiter	Shuffling Column Values	
Recruiting	XML response to BGI request	RCM BGI Request Response	Null	
Recruiting	Contact Email	RCM Secondary Candidate Email	Fixed or Null	If an email address is present, then it is updated to <a href="mailto:dummy@successfactors.com">dummy@successfactors.com</a> .
Recruiting	Secondary Candidate Name	RCM Secondary Candidate Name	Shuffling Column Values	
Recruiting	Offer Letter	RCM Offer Letter	Null	
Recruiting	Candidate Contact Number	Contact Number	Deterministic Anonymization	
Recruiting	Home Phone Number	Home Phone	Deterministic Anonymization	
Recruiting	Fax	Fax Number	Deterministic Anonymization	
Recruiting	Cell Phone Number	Cell Phone	Deterministic Anonymization	
Recruiting	Agency Primary Contact	Primary Contact	Deterministic Anonymization	

Module	Generic Field Label	Generic Field ID	Type of Anonymization	Fixed Value Details
Recruiting	Agency Phone Number	Phone Number	Deterministic Anonymization	
Recruiting	Social Security Number	SSN	Deterministic Anonymization	
Recruiting	Secondary User name	Secondary User name	Deterministic Anonymization	
Recruiting	Candidate Residential Address	Address	Fixed or Null	If an address is present, then it is updated as <i>dummy address</i> .
Recruiting	Attachments	Attachments	Fixed	-99999
Recruiting	Candidate Unique Email	RCM Candidate Unique Email	Randomize	
Onboarding	Email	Recipient Email	Fixed or Null	If an email address is present, then it is updated to <i>dummy@successfactors.com</i> .
Onboarding	Recipient	Recipient Name	Deterministic Anonymization	
Onboarding	View Email	Message Body	Null	
Onboarding	Attachments	Email Attachment	Null	
Onboarding	Email Argument	Email Argument	Null	
Onboarding	Primary Email	RCM Primary Email	Fixed or Null	If an email address is present, then it is updated to <i>dummy@successfactors.com</i> .
Onboarding	Subject	Sent Email Subject	Deterministic Anonymization	

### Note

Some of the previous field names have been merged with new field label names for Recruiting:

- **email\_address** is merged with **Candidate Email**
  - **rcm\_candidate\_info** and **rcm\_application\_d\_candidate\_info** are merged with **Personal Information**
  - **rcm\_application\_candidate\_name**, **rcm\_application\_d\_candidate\_name**, **rcm\_offer\_detail\_job\_app\_name**, and **candidate\_name** are merged with **Candidate Name**
- Custom fields are not within the scope of the Instance Refresh Data Anonymization Process.

# 13 Post Refresh Activities

Once you receive an email notification with refresh status as *Successful*, you must perform certain activities.

- Delete the data from the Data Replication Monitor to keep the target instance clean. For more information, see the **Employee Central Data Replication Monitor** link in the **Related Information** section.
- Ensure that the integrated systems that replicate data from HCM Suite run a full sync to keep the data consistent and integrations working seamlessly.
- Certain jobs are deleted, copied, or restored to the target instance to process the job data based on the configuration.

For example, certain jobs that don't have an impact on any other integrated systems are copied from the source to the target instance. After the refresh, these jobs must be scheduled based on the configurations and data in the refreshed target instance. There are certain jobs, like FTP jobs, that have an impact on other integrated systems, where the FTP endpoints and credentials on the production instance can be different from those on the preview instance. In such cases, a backup of the target instance is taken before refreshing it. After the refresh, all the jobs are restored in the target instance. Jobs scheduled in the source or target but don't need to be copied or restored after the refresh are deleted from the target instance.

- Post refresh, references to all the attachments from the source instance are copied to the target instance. However, the content of all the attachments are replaced with dummy content. If necessary, post refresh, you can manually upload your attachments. This is applicable only to the attachments that are available in SAP SuccessFactors HCM suite and not to SAP SuccessFactors Learning.

## Note

If the source instance is using a third-party storage provider to store attachments, for example OpenText, then these attachments aren't copied from source to target instance, post instance refresh. To view your company's document storage vendor, go to ► [Admin Center](#) ► [Configure Document Management](#) ►.

- Only *Employee Profile emails* and *Recruiting emails* (internal and external candidates) are masked as part of the refresh process. If you've enabled *Employee Central* in the source instance and have set business emails for some users, then post refresh, you must import Business email to mask Employee Central - business emails. This avoids the masked email in user data file (employee profile emails) to be overwritten with live email.
- After your target instance is refreshed successfully, a backup of your target instance (which was taken before refreshing) is kept for 10 days. This is applicable for both manual refresh and refresh using the Instance Refresh self-service tool.
- Ensure that the PGP Keys are restored as part of the post refresh activity.

## Post Refresh Activities

Product	Post refresh activities
Career Explorer	Post refresh, if <b>Career Explorer</b> isn't available in the target instance, then you must enable the required permissions to see <b>Career Explorer</b> in the target instance. For more information on enabling <b>Career Explorer</b> , see the related link section.



Product	Post refresh activities
Onboarding	<p>If your instance has Onboarding:</p> <ul style="list-style-type: none"> <li>• Enable PFS using the same credentials as the source instance. To enable PFS, see the <b>Enabling Print Forms Service</b> link in the <b>Related Information</b> section.</li> <li>• Upload the forms. To upload forms, see the <b>Uploading a Document Template</b> link in the <b>Related Information</b> section.</li> <li>• Set up DocuSign using the target instance credentials that you noted before refresh. To set up DocuSign, see the <b>Setting Up DocuSign for Onboarding</b> link the <b>Related Information</b> section.</li> <li>• Deploy BPE schema in your target instance. To deploy BPE schema, see the <b>Deploying Onboarding Process Definition</b> link in the <b>Related Information</b> section.</li> </ul> <p>Post-refresh:</p> <ul style="list-style-type: none"> <li>• The Onboarding Dashboard will display copied Onboarding New Hire records from the source system to the target system.</li> <li>• All tasks for New Hires will be marked as completed.</li> <li>• It's recommended that you run the <b>Onboarding Process Closure Job</b> to remove all the Onboarding processes that are copied from the source instance.</li> <li>• To reuse the Onboarding processes that are copied from the source instance to the target instance, it's recommended that you restart or cancel the Onboarding process from the <b>Onboarding Dashboard</b> by choosing <b>Restart</b>.</li> </ul>

## Product

## Post refresh activities

### Identity Provisioning Service (IPS)

When your target instance SAP SuccessFactors **HCM suite** is integrated with SAP Cloud Identity Services - Identity Authentication, the Identity Provisioning Service (IPS) admin must verify IPS template where refreshed target instance is the source system and then do a manual resync in IPS. This configuration allows users to access the refreshed target instance. To configure the IPS job with proper user:

- Ensure that all user entities are synched to IAS using IPS. Run a resync job in the source systems to ensure that the users are synced. See **Managing Job Log Jobs** from Identity Provisioning in the **Related Information** section.
- Before doing the IPS resync, you need to verify IPSADMIN and corresponding permissions in the refreshed target instance. See **Manage Properties** from Identity Provisioning in the **Related Information** section.
- If you have set up real-time user sync, you need to verify and update the integration configuration for the business scenario Real-time User Account Sync from SAP SuccessFactors to SAP IPS. For more information, refer to the **Related Information** section.
- If there are no users with the permission to export user data with one of the conditions, perform the corresponding action.

Condition	Action
You're able to log in to the refreshed target instance.	Create users with the permission to export user data. To create users with this permission, see <b>Granting Permissions</b> and <b>Setting API Login Exceptions</b> from <b>SAP SuccessFactors HCM Suite OData API: Developer Guide</b> in the <b>Related Information</b> section.
No one is able to log in to the refreshed target instance.	You can perform one of the following options: <ul style="list-style-type: none"><li>• Your IAS admin must change the login name of a user in IAS to that of a known SAP SuccessFactors admin from the source instance. To change the login name, see <b>List and Edit User Details</b> from Identity Authentication in the <b>Related Information</b> section.</li><li>• Your IAS admin can manually create a user in IAS that matches a known SAP SuccessFactors admin from the source instance. To create an IAS user, <b>Create a New User</b> from Identity Authentication in the <b>Related Information</b> section.</li></ul>

Product	Post refresh activities
Learning	<p data-bbox="532 289 1427 415">When your Learning Target System is integrated with Identity Authentication and Identity Provisioning Services (initiated or activated) and user data was synched to Identity Authentication from Learning prior to refresh, all Learning-only users must be removed from Identity Authentication and a full sync run to keep the data consistent.</p> <p data-bbox="532 443 932 464">To delete users in Identity Authentication:</p> <ul data-bbox="544 491 1406 625" style="list-style-type: none"> <li>• Ensure that all user entities have User Source System populated.</li> <li>• Remove Learning-only users by setting lms.user.filter to: username eq "xxx" in Identity Provisioning &gt; Source Systems &gt; Learning &gt; Properties tab, where "xxx" is a username that doesn't exist. On the Jobs tab, select the Run Now action.</li> </ul> <p data-bbox="532 653 1068 674">To resync user from Learning to Identity Authentication:</p> <ul data-bbox="544 701 1422 865" style="list-style-type: none"> <li>• Resync Learning-only active users by modifying lms.user.filter to: sourceSystem eq "Learning" and active eq "true" (thereby removing username="XXX"). On the Jobs tab, select the Run Now action. Verify the job execution to ensure all users needed in your Identity Authentication environment are synched and the Identity Authentication Global User ID is populated in the Learning user record, Global User ID field.</li> </ul> <div data-bbox="578 888 1427 1110"> <p data-bbox="602 898 698 926"><b>Note</b></p> <p data-bbox="602 957 1409 1083">If Identity Authentication was activated, a password must be established for a learning-only user to access the Target system. An Identity Authentication administrator can set the initial password for existing users. For users created after the refresh, the Identity Provisioning transformation rule to send mail can be enabled.</p> </div> <p data-bbox="532 1131 1398 1327">When your Learning Target System is integrated with Identity Authentication and Identity Provisioning Services (initiated or activated), Child applications (Learning sites) in Identity Authentication will inherit the Learning Application settings. Any overrides required must be configured in Identity Authentication since each site copied from source will be created as a new application in Identity Authentication. You can choose to manually delete Identity Authentication child applications left over from the original target instance data.</p> <p data-bbox="532 1354 1414 1444">If your Learning Target System integration with Identity Authentication and Identity Provisioning Services wasn't initiated, you can proceed with the setup process if such integration is needed.</p>
Integration Center	Destination settings need to be manually maintained and the integration has to be explicitly saved.

## People Analytics

For Stories in People Analytics, run the IPS sync twice. In the first run the IPS will read the users once and delete the delta users and in the second run, it will create the users correctly with the new information and Person UUID that came from the source.

If the IPS Sync fails with an Authentication Error, check if the source instance and the target instance have the same password for the user. If they don't match, you can run a Read job to confirm if it fails to read users. If yes, update the password in IPS.

**Note**

If you do not know the password, reset it on SAP SuccessFactors and update it in the IPS source system and IAS source system.

Fundamentally, users who were already synced before the instance refresh should be removed from SAP Analytics Cloud. New user records in SAP SuccessFactors should sync successfully. To achieve the correct deletion, creation, and updating of users from the SAP SuccessFactors tenant after an instance refresh, please review the following steps:

**Note**

If you're already using SCIM IPS connectors, we strongly recommend migrating to permission-based user sync after an instance refresh. This approach limits user sync to only those with Report Center permissions. For detailed migration instructions, please refer to the "Migrating to Permission-Based User Sync for Stories in People Analytics" topic. You can also check the enablement configurations section in the "Implementing Design Principle" guide.

- Ensure the refreshed SAP SuccessFactors system doesn't have any duplicate email IDs. If duplicates exist, update each user with unique email IDs before invoking IPS RESYNC.
- Do not invoke IPS Reset or modify any properties or transformations in the IPS source or target. Ensure the IPS SAC target properties are updated as mentioned in the "Things to Know" section, with `ips.delete.existedbefore.entities` set to true.
- Run the IPS RESYNC job two to three times and ensure it completes without any errors.
- With each sync, ensure there are no errors, especially during read operations from the SAP SuccessFactors source. If there's any error in reading users from the source, IPS won't delete any users in the connected target systems, such as SAP Analytics Cloud.

## Related Information

[SAP Note 2835061](#)

[Employee Central Data Replication Monitor](#)

[Implementing the Employee Central Compound Employee API](#)

[Manage Jobs and Job Logs](#)

[Manage Properties](#)

[Granting Permissions](#)

[Setting API Login Exceptions](#)

List and Edit User Details

Create a New User

Enabling Print Forms Service

Uploading a Document Template

Setting Up DocuSign for Onboarding

Deploying Onboarding Process Definition

SAP Note 2301924 

Synchronizing User Account from SAP SuccessFactors to SAP Identity Provisioning Service in Real Time

Enabling Career Explorer

How to migrate User Passwords from SAP SuccessFactors to Identity Authentication 

# 14 Downloading the Error Log File

Download the error log file to find more details on the error status of the instance refresh request.

## Prerequisites

Either the [View Refresh Requests](#) or the [Manage Refresh](#) permission must be enabled.

## Context

When the status of your refresh request is in [Validation Failed](#), [Completed with Warnings](#), [Failed](#), or [Reverted](#), the Instance Refresh tool generates an error log file in which you can find the details of these errors, and the summary of an instance refresh request. You can download the error log file from the [Overview](#) tab of the [Instance Refresh Center](#) page. An email notification is also sent to you providing the details of these errors.

As a pre-validation check, we've also integrated [Check Tool](#) in the error log file. With the help of the [Check Tool](#) integration, administrators can fix potential problems and errors in the source instance, before refreshing the target instance. This avoids replicating the same errors in the target instance, post refresh.

There are two types of errors that can occur during refresh request:

- Technical Errors are the ones that you can fix by contacting SAP Cloud Support. As a next step, download the error log file, and then contact SAP Cloud Support through support ticket and attach the downloaded error log.
- Non-Technical Errors are the ones which you can fix. To know the errors, download the error log file and fix accordingly.

## Procedure

1. Logon to your SAP SuccessFactors source instance.
2. Go to [Admin Center](#).
3. In the [Tools Search](#) field, enter **Instance Refresh**. Access the tool by clicking on the search result.

The [Instance Management](#) page appears with the [Full Copy \(Instance Refresh\)](#) option selected.

4. Click [Next](#).

The [Instance Refresh Center](#) page appears.

5. Identify your instance refresh request.
6. Click the ellipsis button under the [Action](#) column for the identified instance refresh request, and then click [Download Log](#).

## Results

A text file is downloaded to your system with the error details. The error log also displays the results of the checks that were last run using [Check Tool](#).

### Note

We recommend that you run the checks using [Check Tool](#) just before you submit an instance refresh request and fix the errors and problems in the source instance to avoid replicating the same issues in the target instance, post refresh.

# 15 Canceling Instance Refresh Request

Certain steps are required to cancel the instance refresh request.

## Prerequisites

- Either the [View Refresh Requests](#) or the [Manage Refresh](#) permission must be enabled.
- The status of the request should be either [Scheduled](#) or [Validation in Progress](#).

## Procedure

1. Logon to your SAP SuccessFactors source instance.
2. Go to [Admin Center](#).
3. In the [Tools Search](#) field, enter **Instance Refresh**. Access the tool by clicking on the search result.  
The [Instance Management](#) page appears with the [Full Copy \(Instance Refresh\)](#) option selected.
4. Click [Next](#).  
The [Instance Refresh Center](#) page appears.
5. Identify your instance refresh request.
6. Click the ellipsis button under the [Action](#) column for the identified instance refresh request, and then click [Cancel](#).

## Results

The instance refresh request is canceled and the status [Cancel](#) is updated in the [Overview](#) tab.



# 16 Change History

Learn about changes to the documentation for Instance Refresh in recent releases.

## 1H 2025

Type of Change	Description	More Info
Added	Added information about steps to approve production tenant refresh.	<a href="#">Approving Production Tenant Refresh [page 26]</a>
Added	Added information about scheduling refreshes over the weekend using the Instance Refresh Tool.	<a href="#">Creating an Instance Refresh Request [page 22]</a>
Changed	Added information about the supported schema size limit being increased to 650 GB.	<a href="#">Important Notes while Using the Instance Refresh Tool [page 6]</a>
Added	Added information on the <i>Do not delete global user IDs</i> option.	<a href="#">Creating an Instance Refresh Request [page 22]</a>

## 2H 2024



Type of Change	Description	More Info
March 14		
New	We added new information regarding the things to know before refreshing a target instance for Stories in People Analytics.	<a href="#">Things to Know Before Refreshing the Target Instance [page 14]</a>
New	We added new information regarding the post refresh activities for Stories in People Analytics.	<a href="#">Post Refresh Activities [page 36]</a>
October 11		
New	The Instance Refresh Tool supports deleting invalid instance pairs.	<a href="#">Deleting an Instance Pair [page 28]</a>

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