Environment Refresh Events

An environment refresh is the replacement of one environment (target) with a copy of another environment (source), which can be either an existing environment or a back up of an environment. In Stat, you document any environment refresh that you have performed or are planning to perform so Stat reporting properly reflects refresh activities and the state of each environment. This is done in the Environment Refresh tab of the CSR window, which is displayed based on a combination of service domain and CSR type.

When you document an environment refresh event, the Stat Repository is updated to reflect any changes the refresh has made to the definition of the target environment. This is done by specifying the start and complete dates of the refresh event. When the specified completion date has elapsed, a process request is submitted automatically to the Stat Agent to update the definition of the target environment in the Stat Repository. Start and completion dates are explained in greater detail below.
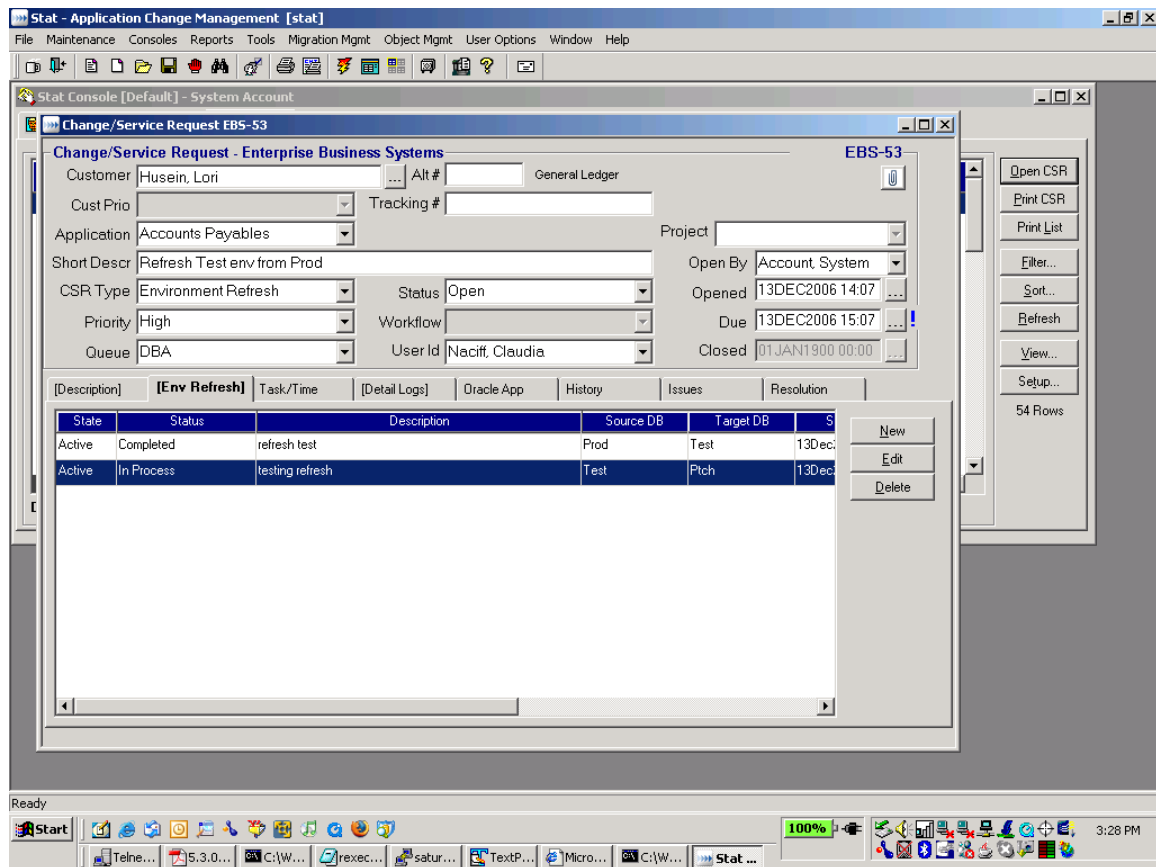
Note Although documenting environment refresh events updates the definition of the target environment in the Stat Repository, the history of environment before it was refreshed is retained. This allows you to run activity-based reports on the environment that do not take the refresh event into account. Activity-based reports are explained in greater detail below.

For each environment refresh event, the Environment Refresh tab displays the following information:

• The current state of refresh record, which can be either Canceled for deleted records or Active for records that are still in effect.
• The status of the process request submitted to the Stat Agent
• A description of the refresh event
• The target environment of the refresh
• The source environment of the refresh
• An optional start date and completion date
• A back up date, if the source of the refresh is a back up of an environment
The user documenting the refresh event and the time the record was last updated

Example of environment refresh definitions and the data captured.

Note: You document environment refresh events in a change service request (CSR) that has a CSR Type of Environment Refesh.

Documenting Environment Refresh Events

Documenting an environment refresh in Stat entails specifying the source and target environments and the time frame in which the refresh occurred or is scheduled to occur. Specifying a time frame is done in terms of start and completion dates. If you are using a back up of an environment as the source of the refresh, you must also specify the date that the back up of the source environment was taken.

The Environment Refresh Window

You document environment refresh events in the Environment Refresh window. To open this window, click **New** in the Environment Refresh tab, or in the case of an existing refresh event record, select the record and click **Edit.**

Note: You document environment refresh events in a change service request (CSR) that has a CSR Type of Environment Refesh.

Actual Dates, Scheduled Dates, and Back Up Dates

When you document an environment refresh event in Stat, you have the option of specifying the date, hour, and minute the refresh event started or is scheduled to start, as well as the date, hour, and minute the refresh event completed or is schedule to complete. You can specify this time frame in terms of either actual dates or scheduled dates. In addition if you are using a back up of an environment as the source for the refresh, you must also specify the date, hour, and minute that the back up of the source environment was taken.

Actual Dates

You specify the time frame using actual dates if the environment has already been refreshed and you want to document the refresh event after the fact, or if you know that the environment will be refreshed at some specific time in the future. When you specify a future actual start date, Stat locks the target environment and prevents users from working within that environment beginning at the time specified in the **Actual Start Date** field. At this point, users will receive an error message if they attempt any activity within the target environment. The target environment remains locked until the time specified in the **Actual Complete Date** field, if any, has elapsed. When you first document a refresh event, you can specify an actual start date without specifying an actual complete date. Once the refresh has been completed, you can then edit the refresh record and specify an actual complete date, which removes the lock on the target environment. The actual complete date must be later than the time specified in the **Actual Start Date** field. Also, you cannot specify an actual complete date without first specifying an actual start date.

The Stat Agent does not process a refresh event until the time specified in the **Actual Complete Date** field has elapsed. If you are documenting an environment refresh event that has already occurred and specified the actual completion date, the Stat Agent processes the request immediately after you save.

Scheduled Dates

You specify the time frame using scheduled dates when there are tentative plans to refresh the environment at some future time. When you use scheduled dates, users can still work within the target environment during the scheduled refresh event but will receive a warning message stating that the environment may be in the process of being refreshed. At any time before or after the refresh event, you can edit the refresh record and change the scheduled dates to actual dates.

As with actual dates, the scheduled end date must be later than the time specified in the **Scheduled Start Date** field. Unlike actual dates, however, scheduled dates require that you specify both a start and an end date.

Backed Up Dates

If you are using as the source of the refresh a back up of an environment, you need to specify the date and time when that back up of the environment was taken. This environment up to the date and time of the back up.

Steps To document an environment refresh event:

1 Create a CSR with the CSR Type of Environment Refresh

2 Click the tab labeled Env Refresh

3 Click the New command button to create an environment refresh record

4 In the Environment refresh window, select the environment that is being refreshed in the **Target Database** field.

5 In the **Source Database** field, select the environment that is the source for the refresh. if you select the same environment as the target environment, you must also select the **Refresh From Backup** checkbox, meaning that the source of the refresh is a backed up version of the target environment.

6 (Optional) Select **Refresh From Backup** if you are using a backed up version of an environment as the source for the refresh.

The backed up environment can be the same environment as the target environment. Then specify the date the source environment was backed up in the **Backup Date** field.

7 (Optional) Specify the time frame of the refresh event, either in terms of actual dates or scheduled dates:

• In the **Actual Start Date** field, specify the date and time the environment refresh began or is scheduled to begin. Then in **Actual Date Completed** field, specify the date and time the environment refresh was completed or is scheduled to be complete. You can enter the date, hour, and minute manually or you can click the **Browse** button in either field and use the Calendar tool. Remember that you can specify an actual start date without specifying an actual complete date, but you cannot specify an actual complete date without first specifying an actual start date. Also, the actual complete date must be later than the time specified in the **Actual Start Date** field.

In the **Scheduled Start Date** field, specify the date and time the environment refresh is scheduled to begin. Then in **Scheduled End Date** field, specify the date and time the environment refresh is estimated to be complete. You can enter the date, hour, and minute manually or you can click the **Browse** button in either field and use the Calendar tool. Remember that you cannot specify a scheduled start date without also specifying a scheduled end date, and that the scheduled end date must be later than the scheduled start date.

Note If you have specified an actual completion date and saved the refresh event record, you cannot change the completion date or otherwise edit the record in any way. Instead, you should cancel the record and document the refresh event a second time. Also, try to make actual start and complete times as precise as possible because any time discrepancy could result in lost or inaccurate data.

8 In the **Description** field, briefly describe the refresh event.

9 When finished, click **OK** to save your work.

Canceling Environment Refresh Records

If you have not specified an actual completion date, at any time you can remove a refresh event record by selecting it on the Environment Refresh tab and clicking **Delete**. If you have specified an actual completion date, or if the completion date has elapsed and you want to undo the update of the Stat Repository, select the record in the Environment Refresh tab and click **Edit**. Then in the Environment Refresh window, click **Cancel Request.** When you cancel a request after the completion date has elapsed, the definition of the target environment in the Stat Repository is returned to its original state before the Stat Agent processed the refresh request.

State-Based and Activity-Based Reports

Updating the Stat Repository by documenting environment refresh events allows you to run state-based reports. A state-based report takes into account changes made to an environment due to a refresh event. It shows the objects and archive sets that exist in an environment at a particular moment in time. This is in contrast to activity-based reports that show the history of activities that have occurred within an environment, such as migrations and upgrades. Stat supports both types of reports for your environments, even those that have been refreshed. If an environment has been refreshed, however, an activity-based report may not accurately reflect the state of the environment as it exists after being refreshed. State-based reporting of environment refresh events is supported in the Migration History Wizard, the Oracle Apps Patch Level Compare feature, and the Stat Report Library.

To illustrate the differences between state and activity-based reporting, suppose you migrated an archive set into your Test environment and then later refreshed that environment with another environment named Production. A state-based report run after the refresh event would accurately show that the archive set no longer exists in Test, since this data would have been overwritten when Test was refreshed with Production. An activity-based report, however, would show that the archive set had been migrated into Test, which would be accurate in an activity-based sense but would not take into account the fact that after the migration the environment had been refreshed, thereby creating the false impression that the archive set still existed in Test.

Processing Environment Refresh Transactions – Setting the Actual Completion Date

When the actual completion date is set, the system will prompt for acknowledgement that you want to continue with the setting.
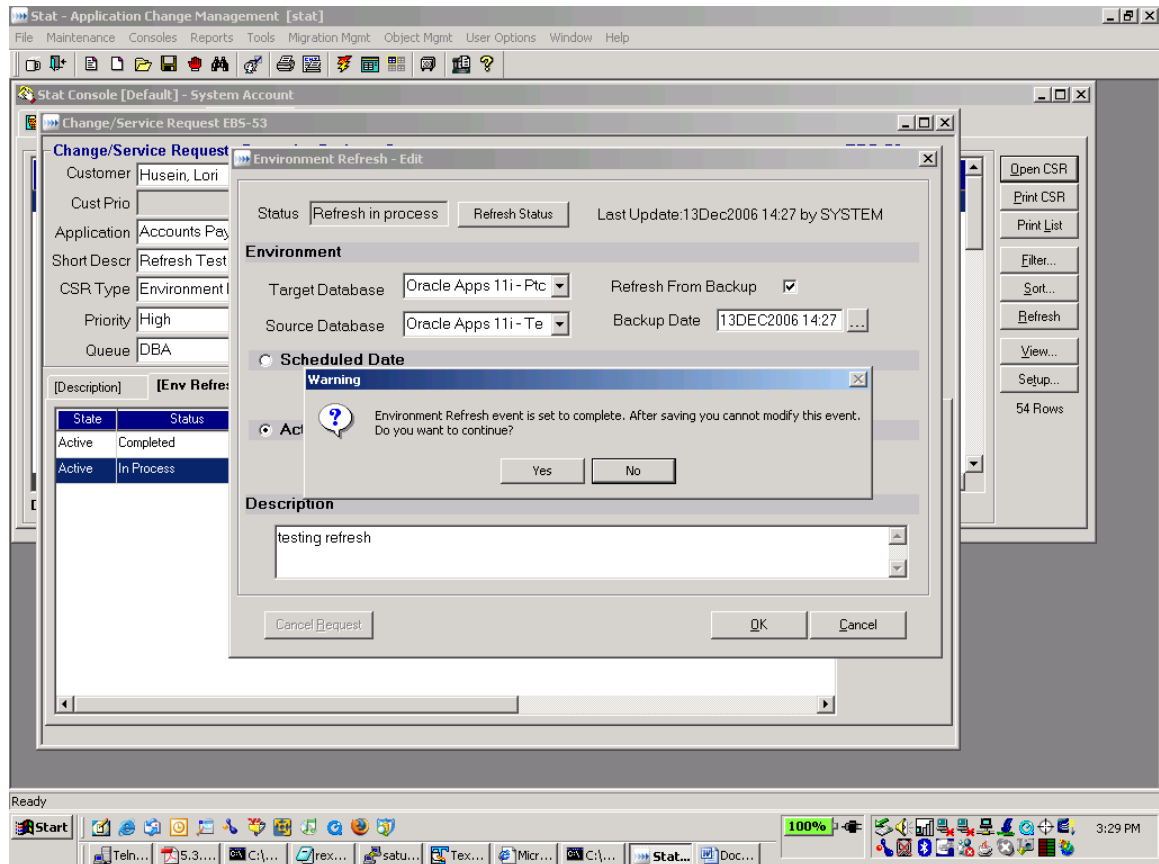
Once the actual completion date is specified, stat will update the patch and file objects for the target environment to reflect the patch and file objects of the source environment. This is done to synchronize the target objects with the source objects enabling stat to maintain an accurate record of objects in the target environment after a refresh has been performed.

Processing Environment Refresh Transactions – Environment Refresh Status "Waiting for Agent"

The environment refresh status of "Waiting for Agent" is displayed after the actual completion date is set in an environment refresh transaction. The status indicates that the stat windows client has submitted a request for a stat oracle agent to synchronize the objects between source and target environments.

Processing Environment Refresh Transactions – Environment Refresh Status "Agent in Process"

The environment refresh status of "Agent in Process" indicates that stat is updating object information for the target environment. When stat is done updating object information, the status will be changed to "Completed".

Processing Environment Refresh Transactions – Environment Refresh Status "Completed"

The environment refresh status of "Completed" indicates that stat has is done updating the object information for the target environment. Users will now be able to work with objects performing migrations and checking out objects in the target environment.