

# How-To: Creating a Testing Environment by Cloning a Data Model (Clone & Remap)



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## Why use this feature?

When your Vena environment is set up and in production, performing testing on your templates can be risky. If you make a mistake, it can have a major impact on your Vena processes and everyone who is involved with them.

This is where creating a testing environment can be very helpful. You can experiment however you like within the testing environment, without the risk of affecting your live processes. A testing environment is most useful when it closely mimics your production environment, so using the **Clone** and **Remap** features is the most efficient way of creating a testing environment that is functionally identical to the live environment.

In this article, you will learn how to set up an environment to safely perform testing and additional data modeling by cloning your data model and processes and remapping associated templates.

## Before you begin

To follow the instructions in this article, you will need **Admin**, **Manager** and **Modeler** access. If Data Permissions are set up in your environment, you will also need the appropriate permissions for the data that you are working with.

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## Overview

The entire process consists of five steps:

1. **Clone the data model:** This creates a duplicate of the production database and member hierarchy, which will form the basis of your testing environment.
2. **Copy the process:** The data model you cloned in the first step will typically have a process associated with it. This creates a duplicate of that process.
3. **Detach the processes:** When the original data model and process have been copied, both the original and copied processes will be attached to each of the original and cloned data models. Since you want only the copied process to be separate, this step ensures that only the appropriate process is attached to each data model.
4. **Remap the templates in the copied process:** The templates belonging to the copied process will still be mapped to the original data model. This remaps them to the cloned data model.
5. **Set up Data Permissions:** Any permissions set up on the original data model will not be inherited by the cloned data model. This recreates the same permissions in the testing environment.

After completing these steps, you will have an exact duplicate of your production environment (as of the time of duplication) to use for testing purposes.

## How to

### 1. Clone the data model

**To create a copy of a data model:**

1. Select the **Modeler** tab.
2. On the **Data Modeler** page, navigate to the data model you want to clone and hover over it; select the  (**Clone Model**) icon.

Financial Model - Trainee 13

Account, Department,  
Year, Period,  
Scenario, Currency,  
Measure

Hierarchy  
 Attributes  
 Values  
 Line Item Details

Cancel ✓ Save Item

- In the drawer that opens, enter a name in the textbox for your newly cloned model and a description (optional).

Remember to identify the processes you want to include (Hierarchy, Attributes, Values, Line-Item Details).

**Financial Model Clone**

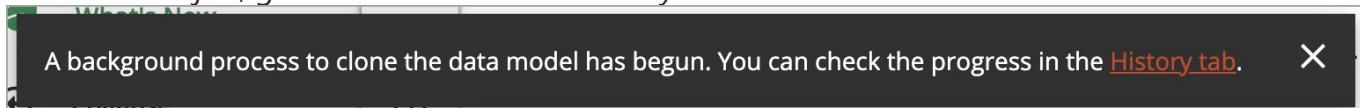
Name	Description (optional)
Enter Model name	Enter Model description

**Process name**

Hierarchy  
 Attributes  
 Values  
 Line Item Details

Cancel ✓ Save Item

- Select the **Save Item** button.
- A message will confirm that an ETL job for the data model cloning was created. To check on the status of this job, go to *Modeler > ETL > History*.



- When the cloning job has finished, refresh your browser. The cloned model will appear in the *Data Modeler* table.

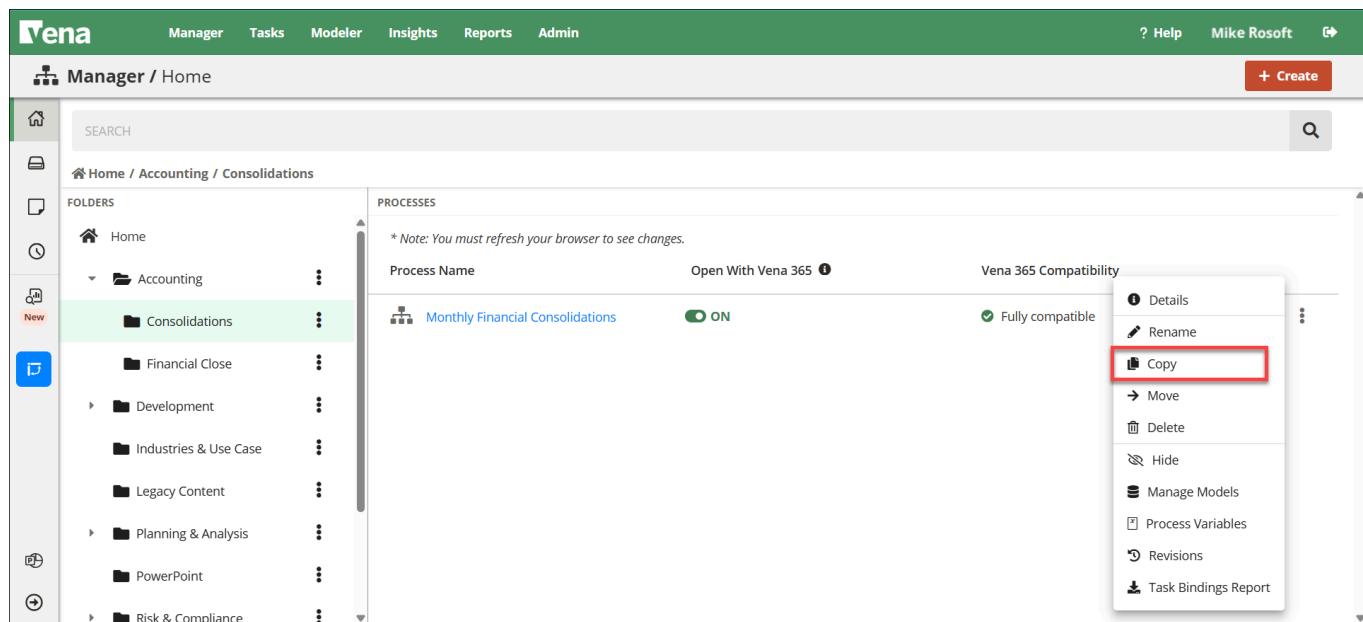
## Note

Any processes attached to a data model will also be automatically attached to any clones of that data model. The original process should be detached from the cloned data model and replaced with a copy (see below).

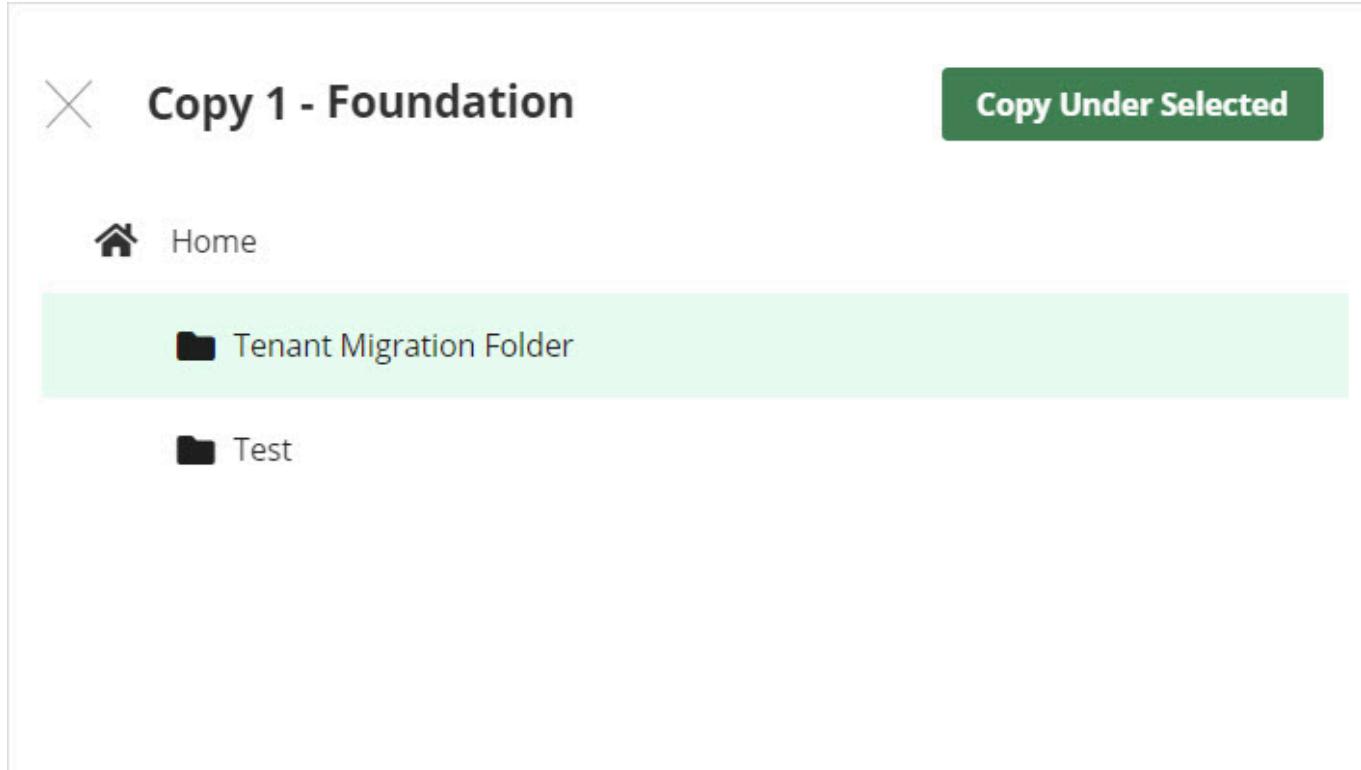
## 2. Copy the process

### To duplicate a process:

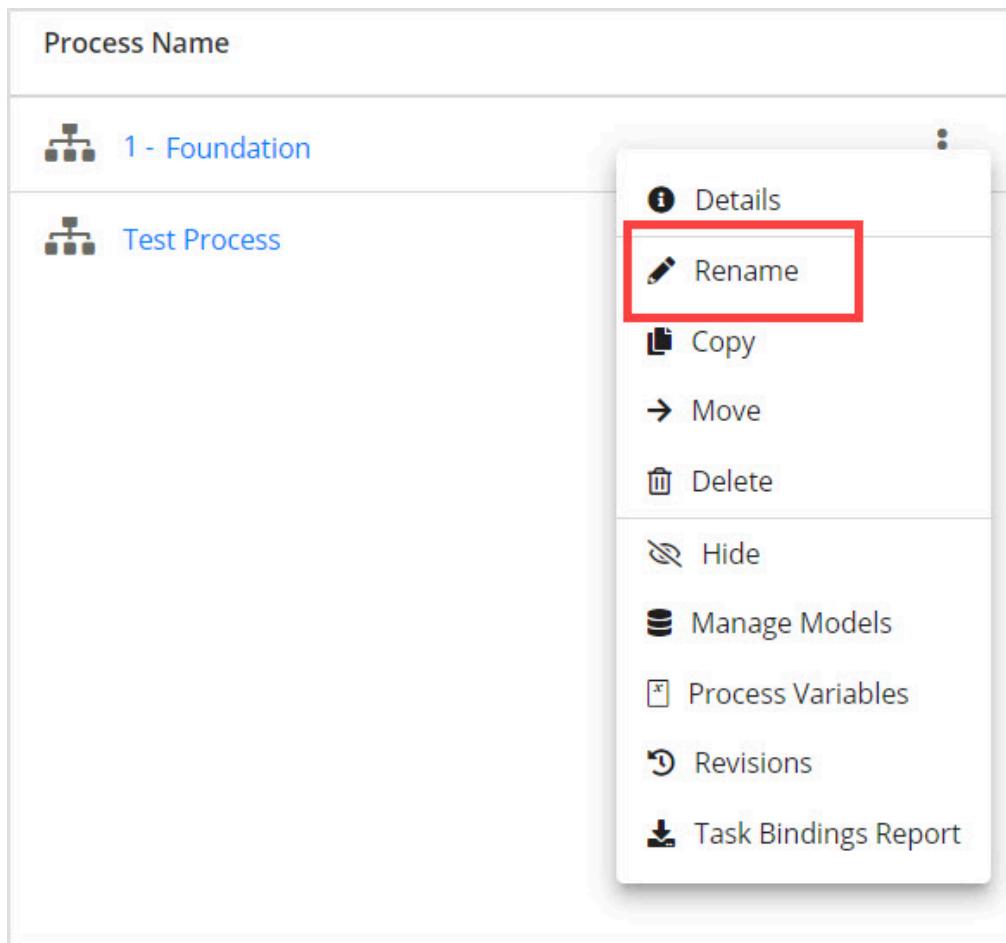
1. Navigate to the **Manager** tab to view the list of available processes.
2. Right-click on the row containing the process that was attached to the data model you cloned.  
Select **Copy** from the menu.



3. In the drawer, indicate which folder you want to paste the selected process.



4. Select **Copy Under Selected** to complete the action.
5. This creates a new process that appears in the list with the same name as the process it was copied from.
6. To change the name of the copied process, right-click on the row of the new copied process and select **Rename**. Enter a new name for the process then select **Rename** to complete the action.



### 3. Detach the processes

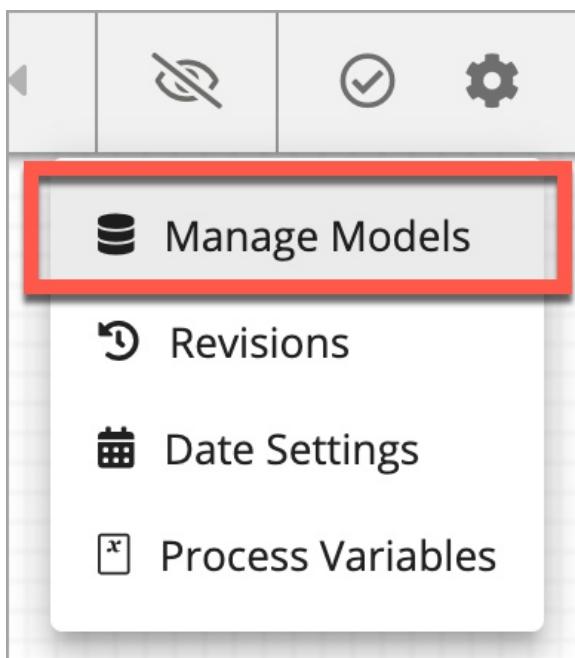
#### To modify process attachments:

Attaching a data model to a specific process must be done through the **Manager** tab. See below for instructions:

1. Navigate to the **Manager** tab.
2. Locate the *Processes* table.
3. Select the **process** to which you want to attach a data model. This opens the process workflow.

The screenshot shows the Vena Manager interface. The top navigation bar includes Manager, Tasks, Modeler, Insights, Reports, and Admin. Below the navigation is a search bar and a breadcrumb trail: Home / Accounting / Consolidations. On the left, there's a sidebar with icons for Home, Folders, Processes, and New. The main area displays a table titled 'PROCESSES' with a note: '\* Note: You must refresh your browser to see changes.' It lists a single process: 'Process Name: Monthly Financial Consolidations' with an 'Open With Vena 365' button and a switch labeled 'ON'.

4. On the *Designer* page, select the (gear) icon in the upper right-hand corner.
5. Select **Manage Models** from the drop-down list.



6. Select the X button next to the data model that you want to remove from your process.

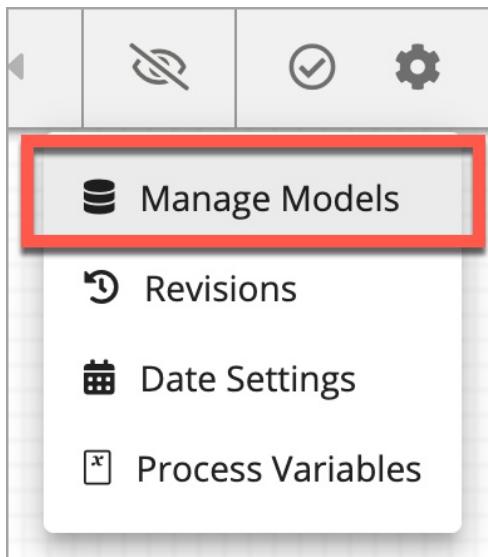
## 4. Remap the templates

To remap templates:

1. Navigate to the **Manager** tab.
2. Select the **process** you want to attach a data model to from the *Processes* table. This opens the process workflow.

The screenshot shows the Vena Manager / Home interface. On the left is a sidebar with icons for Home, Folders, New, and Import. The main area has a breadcrumb trail: Home / Accounting / Consolidations. On the left, there's a tree view of FOLDERS: Home, Accounting (expanded to show Consolidations, Financial Close), Development, and Industries & Use Case. On the right, under PROCESSES, there is a table with one row. The row contains a process icon, the name "Monthly Financial Consolidations" (which is highlighted with a red box), and a toggle switch labeled "ON". A note at the top of the table says: "\* Note: You must refresh your browser to see changes."

3. On the *Designer* page, select the (gear) icon in the upper right-hand corner.
4. Select **Manage Models** from the drop-down list.



5. Use the *Attach New Model* drop-down to select the data model that you want to attach to the process.

- Once you've selected the cloned model, select **Attach** to complete the action.

The screenshot shows a modal window titled "Attach New Model". Inside, there is a dropdown menu with "Financial Model" selected. To the right of the dropdown is a red rectangular button with the word "Attach" in white. The background of the modal is light gray.

- Repeat steps 1-6, above, for any other templates that you want to use in your testing environment.

## 5. Set up data permissions

By default, the cloned data model and the copied process will not be accounted for in your existing permissions structure. As a final step, you will need to set up additional permissions for them.

### To set up data permissions:

1. Navigate to the **Admin** tab.
2. Navigate to the **Permissions** page.

The screenshot shows the Vena Admin interface. At the top, there is a green header bar with the Vena logo and several tabs: Manager, Tasks, Modeler, Insights, Reports, and Admin. The Admin tab is currently selected. Below the header, there is a navigation bar with links: Users (47), User Audits, Permissions (which is highlighted with a red box), File System, Policies, Application Tokens, Import History, and Migration. The main content area is titled "User Groups" and contains sections for "User Groups", "Group Members", "Data Permissions", and "Application Permissions". There is also a "Filter" input field at the bottom left.

3. Find the User Group containing the users that you want to grant access to the testing environment. Alternatively, you can create a new user group by selecting **+Add Group**.
4. Select **View/Edit** under both *Data Permission* and *Application Permissions* to set up the appropriate permission for both the cloned data model and copied process.

The screenshot shows the "User Groups" page. At the top, there is a header with "User Groups" and a "+ Create User Group" button. Below the header, there are four columns: "User Groups", "Group Members", "Data Permissions", and "Application Permissions". A "Filter" input field is located at the top of the "User Groups" column. In the "Data Permissions" and "Application Permissions" columns, there are two "View/Edit" buttons, each highlighted with a red box. The "User Groups" column lists "Superusers" and "51" members.

5. Repeat steps 3 and 4 as necessary.

## 6. Finishing up

After you have completed the instructions in each of the five preceding sections, your testing environment will be set up and ready to use. You can begin using it right away and can try out new features, modeling or template modifications without any risk to your production environment.

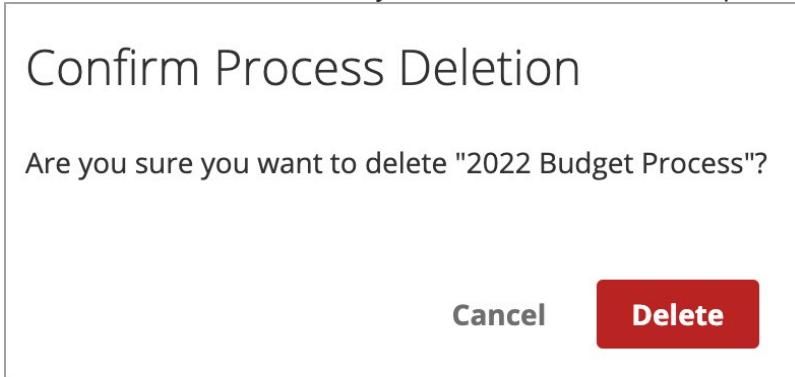
If desired, you can also delete the testing environment at any time by deleting the cloned data model and the copied process.

### To delete a testing environment:

1. Navigate to the **Manager** tab.
2. Right-click on the process belonging to the testing environment.
3. Select **Delete**.

The screenshot shows a list of processes under the 'PROCESSES' tab. A context menu is open over the first item, '2022 Budget Process'. The menu items are: Details, Rename, Copy, Move, Delete (which is highlighted with a red box), and Hide. To the right of the menu, there is a note about Vena 365 Connect Compatibility and two status indicators: 'Fully compatible' with a checkmark and 'Fully compatible' again with a checkmark. There are also three vertical ellipsis icons.

4. Select **Delete** in the confirmation window to confirm that you want to delete the process. Make sure to double-check that you selected the correct process to be deleted.



5. The process will be deleted and removed from the list.
6. Navigate to the **Modeler** tab.
7. Hover over the data model you want delete and select the (delete) icon.
8. A confirmation modal will ask you to confirm the delete. Select **Yes, Delete Model** to remove the data model.
9. The data model will be deleted and removed from the list. You have completed the deletion of the testing environment from your Vena tenant.

### Notes & limitations

- The testing environment you create will be an exact duplicate of your production environment at the time it is created. This means that any changes to the production environment after this date will not be reflected in the testing environment (and vice-versa).
- You do not have to copy Values, Line-Item Details and Attributes when you clone the data model. Depending on your preference, leave the relevant box(es) unchecked if you do not want these to be included in the cloned data model. **The only item that is mandatory when cloning a data model is the Hierarchy.**
- Likewise, you do not have to copy the process that was attached to the original data model. If desired, you can also copy a different process and attach it, attach multiple processes or create a new process from scratch.

- When you clone a data model, it will automatically be associated with the same process as the original data model. Likewise, when you copy a process, the copied process will inherit any associations to data models that the original process held. As a best practice, you should ensure that duplicated data models and processes intended to be used for testing are not connected with the original data models and processes.
- Since Data Permissions in Vena are created as exceptions when you add a data model via cloning, the newly cloned model will not include a copy of the data from the original data model. You must export/import intersections to the newly cloned model. The same limits apply to [tenant migration](#).
- The remapping instructions in Section 4 also apply to the following situations:
  - Remapping a new template within an existing process.
  - Remapping an existing template within a new process.