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Request a clone

New York

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Request a clone to copy data from a production instance to a non-production instance, or to copy data between non-production instances.

Before you begin

Role required: admin

About this task

The platform uses data from the most recent, nightly backup of the source instance when cloning. Backups used for cloning are at most 36 hours old. System Clone begins the initial preparation, including selecting the latest backup to use, only at the date and time processing is scheduled to start.

If cloning from a source backup fails, the system uses the legacy clone engine instead. The legacy clone engine cannot preserve data from extended tables, relationships, hierarchies between tables, and dot-walked queries. You may want to restore the target instance from a backup and then reschedule the clone in such cases.

For instances that use an Oracle database, see KB0538884 - System Clone Support for Oracle Customers .

You can automate cloning by scheduling it in the **Options** pane.

Procedure

1. Login to the instance you want to clone.

   This instance becomes the source instance of the clone request.

2. Create a clone target record for each target instance you want to receive clone data.

3. Verify the list of tables excluded from cloning and add or remove tables to exclude from the target instance.

4. Verify the list of tables and system properties that will be saved on the target instance by data preservers and create or modify data preservers as needed.

   The legacy clone engine does not support data preservers for these records.

   - Tables that extend Task

   - Relationships

   - Hierarchies

   - Dot-walked queries

   If you are preserving any data not supported by the legacy clone engine, verify there is a recent backup of the target instance available. Should the clone-from-backup-process fail for any reason, you can restore the target instance from the backup.

5. Preserve any unpublished applications on the target instance.

6. Navigate to **System Clone** > **Request Clone**.

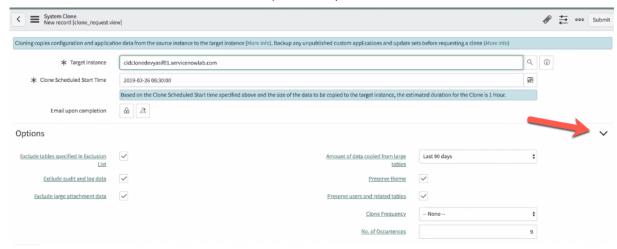7. Select the **Target instance** to receive the cloned data.

   You must create a separate clone request for each target instance you want to receive clone data.

8. Select the **Clone Scheduled Start Time**.

   You can schedule multiple clone requests for the same source instance. For example, create one clone request to copy data to non-production instance A and another clone request to copy data to non-production instance B. The scheduling engine determines whether multiple clone requests against the same source instance can occur simultaneously or whether they need to occur sequentially.

   The system verifies the scheduled start time and either accepts the date-time value you selected, or suggests an available date-time value. The validation process prevents scheduling conflicts with other automations using the same target instance.

9. In **Email upon completion**, enter an address to receive alerts after the cloning finishes, is canceled, or has an error.

10. Click the **Options** arrowhead so it turns downward and use the following table to make appropriate selections in the **Options** pane.

Clone options

Exclude tables specified in Exclusion List

Prevent cloning records from the source instance specified in the **System Clone** > **Exclude Tables** module. Use this option to create empty but usable tables on the target instance. By default, the system excludes tables for auditing, license usage, logging, and notifications. This option is selected by default.

Note: This option is not supported by the legacy clone engine.

Exclude audit and log data

Prevents cloning audit and log records from the source instance. Use this option to create empty but usable audit and log tables on the target instance. This option is selected by default.

Exclude large attachment data

Prevents the cloning of large attachments such as video files, image files, and other typically large binary file types. Excludes all common binary file types, regardless of file size. When selected, the clone also excludes attachments from the Attachments [sys_attachment] and Attachment Documents [sys_attachment_doc] tables that meet all these criteria.

• The attachment table_name value does not indicate it is a small file. Small attachments have table name values that start with ZZ_.

• The attachment data type value indicates it is a large file such as application or video.

• The attachment table_name is not one of these system tables: sys_certificate, ecc_agent_jar, ecc_agent_mib, sys_store_app, or invisible.sys_store_app.

Amount of data copied from large tables

Select the number of days of historical data to clone from large source tables, including task, pa_scores, and metric_instance. By default, the target instance receives the latest 90 days of historical data from the source instance.

Preserve theme

Preserves the theme and CSS elements on the target clone.

Preserve users and related tables

Prevents Users and user-related tables from being overwritten on the target clone.

Clone frequency

Specify how often this target automatically receives clone data. For more information about scheduling cloning, see Schedule cloning.

No. of occurrences

Specify the number of automatic clonings. The maximum value is 9.

11. Click **Submit**.

    The system displays the **Authenticate Target** modal.

12. Enter the **Username** and **Password** for an administrator account on the target instance and click **Authenticate**.

13. Review the clone settings and click **OK**.

    An email is sent to the supplied address after the clone finishes, is canceled, or has an error.

What to do next

You can:

- Schedule automatic clonings.
- Cancel your clone request.
- View the cloning history of completed clonings.

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