

Typical Workflow to Take Snapshots and Restore

Here are the common tasks to back up and restore your content using snapshots.

<i>Task</i>	<i>Description</i>
Take a snapshot	Capture content and settings in your environment at a point in time.
Restore from a snapshot	Restore the system to a previously working state.
Delete a snapshot	Delete unwanted snapshots.
Download a snapshot	Save a snapshot to a local file system.
Upload a snapshot	Upload content from a snapshot that is stored on a local file system.

Take Snapshots and Restore Information

You can take a snapshot of your system at any time.

Topics:

- Take a Snapshot
- Restore from a Snapshot
- Track Who Restored What and When
- Edit Snapshot Descriptions
- Delete Snapshots

Take a Snapshot

Administrators can take a snapshot of the system at any time.

1. Click **Console**.
2. Click **Snapshots**.
3. Click **Create Snapshot**.

4. Enter a short description for the snapshot to help you remember later why you took it.

For example, why you created the snapshot and what it contains.

5. Select the content you want to include, **Everything** or **Custom**.
 - **Everything** - Include everything about your environment in the snapshot except for file-based data, plug-ins, and extensions.
 - **Custom** - Select only the content types you want to save in the snapshot. Deselect any items that you don't want.
6. Click **Create**.

The latest content is saved to a snapshot.

Restore from a Snapshot

If something goes wrong, you can easily restore your content to a previous working state from a snapshot. You also restore snapshots when you migrate content between environments.

Before you start, read these tips about restoring snapshots.

- As you start to restore the snapshot, users currently signed in have their session terminated.
- After you restore from a snapshot, allow time for the restored content to refresh (for example, approximately 15 to 30 minutes for a large snapshot).
- You can restore snapshots taken at the same version (or earlier version) as the target environment. For example, if you take a snapshot of an Oracle Analytics environment that includes the May 2022 update, you can restore it on other Oracle Analytics environments that include the May 2022 update or a later update (such as July 2022).


You might experience unexpected results if you try to restore from a snapshot that was taken from a more recent update of Oracle Analytics. For example, if you take a snapshot of an Oracle Analytics environment that includes the September 2022 update, don't restore this snapshot in Oracle Analytics environments that include an earlier update, such as June 2022.

- When you restore a snapshot taken from a different environment, you must upload the data associated with your file-based datasets to the target environment.


If you restore a snapshot taken from Oracle BI Enterprise Edition 12c (or 11g), Oracle Analytics Server grants additional permissions to your existing application roles so that users automatically get access to new features in Oracle Analytics Server. After restoring the snapshot, you can fine-tune

permission assignments to suit your users using two scripts: `grantPermissionSetsToBIRole` and `revokePermissionSetsFromBIRole`.

To restore a snapshot:

1. Click **Console**.
2. Click **Snapshots**.
3. Select the snapshot that you want to use to restore your system.
4. Click **Snapshot Actions** .
5. Click **Restore** to return your system to the state when this snapshot was taken.
6. In the Restore Snapshot dialog, select only those elements you want to restore.

For example, you may not want to include application roles if you're restoring a snapshot taken from a pre-production environment, to a production environment. Pre-production roles often have different members to the production environment. If so, select **Custom** and deselect **Application Roles** before you restore.

- a. Select the **Restore** option you want.
 - **Replace Snapshot Content Only** - Replace all the content types included in snapshot (listed in the description field) with the content inside the snapshot.
The restore process replaces entire content types on the target. For example, if your target includes workbooks A and B and the snapshot contains workbook A, only workbook A will exist on the target after you restore the snapshot.
Select this option if you don't want to replace or remove any other content types that exist on the target, that is, only replace the content types inside the snapshot.
 - **Replace Everything** - Overwrite all your existing content. Replace your existing content with the content included in this snapshot (listed in the description field). Any content types not included in the snapshot, excluding file-based datasets, plug-ins and extensions, are removed and restored with default settings.
 - **Custom** - Select only the content types you want to restore. You can restore with content saved inside the snapshot or restore content with default settings if that content is missing from the snapshot.
 - Content saved inside the snapshot is listed in the description field.
 - Content not included in the snapshot is marked with a warning icon . Only restore content marked with a

warning icon if you want to restore that content with default settings.

If you don't want to restore everything, deselect all the items you want to keep.

- b. If you select **Custom**, select only those items you want to restore.
- 7. For auditing purposes, enter the reason why you're restoring.

It's good practice to include a restore reason. Later on you might want to analyze the restore history, and this information can help you remember why you restored the snapshot.


- 8. Click **Restore**.

A warning message is displayed because restoring a snapshot can be very disruptive.

- 9. Click **Yes** to restore the selected snapshot, or click **No** to abandon the restore.
- 10. Wait for the restore to complete, and then wait a few more minutes for the restored content to refresh through your system.
The time it takes to restore your system depends on the size of your snapshot. For a large snapshot, allow approximately 15 to 30 minutes.
- 11. Sign out and then sign back in to see the restored content and inherit newly restored application roles, if any.


Track Who Restored What and When

You can check the restore history to learn exactly when and what content was restored, and to check for any errors during the restore process. This might be useful if you experience issues during or after you restore a snapshot.

- 1. Click **Console**.
- 2. Click **Snapshots**.
- 3. Click the Page menu  and select **Show Restore History**.


Edit Snapshot Descriptions

You can add or update the description for any snapshot.

- 1. Click **Console**.
- 2. Click **Snapshots**.
- 3. Select the snapshot you want to edit.
- 4. Click **Snapshot Actions** .
- 5. Click **Edit Name**.
- 6. Update the description, and click **OK**.

Delete Snapshots

From time to time, delete snapshots that you don't need.

1. Click **Console**.
2. Click **Snapshots**.
3. Select the snapshot that you want to delete.
4. Click **Snapshot Actions** .
5. Click **Delete** to confirm that you want to delete the snapshot.