Staging Refreshes - How-To Guide

What is a 'staging refresh'?

A staging refresh, or staging data refresh, is the process of refreshing a staging system's data with a copy of live's data, using both a live database (DB) dump and relevant files from the live web server. This is so that, from the point of refresh (or when the data was moved), you'll have a like-for-like staging system on which to test various features, upgrades or bug-fixes. Staging refreshes will most commonly be performed during an upgrade project.

Lately we have found some common problems (listed below) with the process that can delay some projects, so this article has been made for guidance and assistance to prevent these issues from occurring, and will be shared with you when needed by your project manager.

What are the requirements?

For a staging refresh to proceed successfully, there are two major factors to consider; your hosting set-up (SaaS or on-premise) and your DBMS.

This article is only going to be useful for those who host themselves (on-premise) as, **for SaaS systems, we can do the entire refresh process ourselves**, so nothing is needed from your side. For on-premise systems however, the steps will then change depending on your DBMS (specifically, if you use **MySQL** or **MSSQL**).

MSSQL:

If you use MSSQL, then we ask that you take the following steps prior to and as close to us starting our side of the work, which will be communicated by your project manager:

1. **Restore a copy of the live DB over the staging system DB** - if you're unsure about where these databases are, please contact your IT administrator as these are self-hosted and they should be able to help.
2. Place a copy of the entire Claromentis directory (usually located in C:\Claromentis on your Live system) to the staging file system and **let us know where this has been placed, as we will need to access it.** One additional consideration is that the /data directory may be stored on another drive. We will also need this transferred across so please check this also successfully transfers if needed.
3. If the framework and data directories have been zipped and transferred to the staging server, please ensure that these have been unzipped prior to us performing the refresh, it will help us reduce the time it takes to perform the refresh steps.

MySQL:

If you use MySQL, then we ask that you take the following steps prior to and as close to us starting our side of the work, which will be communicated by your project manager:

1. **Place a copy of the live DB on the staging system** - we will need to know where this has been placed so that we can restore the staging DB with the copy.
2. Place a copy of the entire Claromentis directory (usually located in C:\Claromentis on your Live system) to the staging file system and **let us know where this has been placed, as we will need to access it.** One additional consideration is that the /data directory may be stored on another drive. We will also need this transferred across so please check this also successfully transfers if needed.
3. If the framework and data directories have been zipped and transferred to the staging server, please ensure that these have been unzipped prior to us performing the refresh, it will help us reduce the time it takes to perform the refresh steps.

For MySQL databases only, if required, we can take the copies of the live DB and the Claromentis directory however this **must be communicated to us**

before the upgrade date. We are not however responsible for moving the data from the live web server to the staging web server, so this will still need to be done by your team prior to the staging upgrade.

Common Issues

The issues we see most commonly are as follows:

1. Any part of the required data (files and/or DB) has not been moved across prior to the work starting - this will result in**delaying the scheduled work.**

2. MSSQL: the DB has not been restored, only moved across - this will result in**delaying the scheduled work** as we do need to DB restored if MSSQL is used.

Questions?

If you have any questions, please reach out to your project manager for further assistance! Their team will be able to answer any questions you may have.

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