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## *Partner Environment - Refresh*

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In the software industry, regular database and environment refreshes are a common practice, particularly for cloud-based platforms, SaaS (Software as a Service), and enterprise applications. These refreshes ensure that testing, development, and partner environments remain aligned with production, security is maintained, and users are working with the latest features and configurations.

Here is what to expect for/during/after the refresh of our partner environment

### **1. Schedule**

- Data and configurations are refreshed **quarterly**, scheduled for the first Friday of each quarter. During this time, the partner environment will be inaccessible from Friday at 8 AM until Monday at 11 AM.

### **2. Pre-Refresh Notifications and Communication**

- Anthology will send email notifications 4 weeks, 3 weeks, 2 weeks, and 1 day before the refresh.
- Notifications will be sent both before and after the refresh is completed.
- The community site and <https://docs.anthology.com> will be updated with relevant information.
- Announcements will be posted in the team channel (if applicable).
- One-on-one meetings will be held with new partners to go over the process.

### **3. Data Handling**

- **Data:**
  - All custom data created by users, including test data, configurations, and custom objects, will be cleared and replaced with new data.
  - This new database will include new configurations introduced by the product, as well as updated data elements such as current and upcoming terms, additional courses, and more.

- **Configurations:** All custom configurations, and other settings will be reverted to default settings. Partners will need to reapply any custom configurations after the refresh.
  - As part of partner onboarding, or for those new to this process, Anthology can assist by providing guidance and templates for partners to create their own documentation. This will help partners navigate and work effectively within the refreshed environment. It will also serve as a beneficial exercise for documenting the configurations that are needed for getting an integration working in client production environments.

#### 4. Security and User Management

- **User Access:**
  - **Existing Users:** All users will be removed with the refresh to ensure that only authorized individuals have access. This helps reduce the risk of unauthorized access, particularly if multiple partners or clients share the environment.
  - **New User Creation & App Keys:** New users will be created as part of this process.
    - To request a new user, please submit a ticket via the [Anthology Support Portal](#), providing the following details:
      - First Name and Last Name
      - Existing Login ID (if applicable)
      - Email Address
      - Organization
      - Role/Designation
    - **Password Resets:** Once a new user is created and shared, it's common to require users to reset passwords for security reasons.
    - **Application Keys:** For a partner where a User account is created, new Application keys will be shared so partner solutions can connect with the Partner environment APIs. Please note that Application Keys are set to expire in 100 days which will cover the refresh window.

#### 5. Software Version Updates

- **GA Version Updates:** During the refresh, the latest General Availability (GA) version of the product is usually installed to ensure that users have access to new features, security patches, and bug fixes. These refreshes bring partner environments in sync with production versions of the software, ensuring consistency across customer environments.

## 6. Post Refresh Testing and Validation

- **Verification Period:** We strongly recommend partners to test their use cases, configurations, and data to ensure everything is functioning as expected.
- **Issue Reporting:** please submit a ticket via the [Anthology Support Portal](#),

## 7. Environment use/purpose

It is important to emphasize the point that this is a shared environment. There is no guarantee that data entered by one partner will not be impacted/changed by another. For this reason, it is strongly recommended that this environment not be used for sales demos or any other purpose where there is a dependency on data remaining static.