

SYSPRO Company Clone

SYSPRO 8

Reference Guide

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Company Clone

Exploring

Where it fits in?

This program lets you clone an existing SYSPRO production company to a new or existing SYSPRO non-production company. These sandbox environments will vastly improve the testing and validation of new features and solutions without impact or risk to the live company data.

Things you can do in this program include:

- Backup existing production company
- Restore the company as a non-production, cloned company
- Update the company database by applying eSignatures, events, triggers, etc.



Cloning SYSPRO companies with power tailored customizations should be approached with significant caution as this could have serious or inadvertent consequences due to possible automated integration with third-party systems and the capability of running business objects.

Navigation

This program is accessed from the **Program List** of the SYSPRO menu:

- *Program List > Administration*

This program can also be accessed from the following program(s):

- Company Browse
From the **Company Clone** function.

Terminology

Company

A SYSPRO company refers to a distinct business entity created and managed within the SYSPRO Enterprise Resource Planning (ERP) system. Each SYSPRO company represents a self-contained operational environment with its own business data (including customers, suppliers, inventory, financials, and transactions), configuration settings (such as fiscal calendars, currencies, and localization preferences) and security and access controls (including operator permissions, passwords, and role-based restrictions).

All SYSPRO companies are classified as production or non-production companies:

- A production company refers to an active, operational entity within SYSPRO that a business uses to conduct its daily transactions. The accuracy, availability, retention, and audibility of its data are essential to the organization's ongoing operations and compliance requirements.
- A non-production company refers to a test or sandbox environment. It is not intended for conducting actual business transactions. Data entered in a non-production company is typically non-critical and temporary in nature, often discarded once testing or training activities are complete. Non-production companies are typically used for the following:
 - evaluating configuration options
 - exploring new features or modules
 - validating power tailoring or customizations
 - providing user training



The company name of non-production companies must be preceded with the word **TEST** to clearly distinguish it from production companies.

Starting

Security

Activities

You restrict operator access to *activities* within a program using the **Operator Maintenance** program.

Allowed to clone company

Controls whether an operator can clone a company using the **Company Clone¹** program.

Groups

You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).

Roles

You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Restrictions and Limits

- There is currently no flag or field that defines a company as a non-production company.



The company name of non-production companies must be preceded with the word **TEST** to clearly distinguish it from production companies.

- A SYSPRO company that uses a shared general ledger or inventory can't be cloned.
- Any customization defined against the role or operator within the source company will not be applied to the cloned company.
- The following modules will not be included when cloning a company:
 - Manufacturing Operations Management
 - Embedded Analytics

¹Program: IMPCCL

Solving

FAQs

What are the advantages of starting the cloning process with restoring the database?

The advantages of this method are the following:

- The .bak file can be created during a maintenance window (where nobody used the system)
- The .bak file could be used to create multiple new target companies, each identical in configuration and data.

If the live database is used as the source, each copy operation may result in variations in the target database, as the live data continuously changes.

What happens during the cloning process?

When cloning a company, the following is done:

1. During the backup process, a backup is created from the source company database.
This step can be omitted if a previously created backup file is selected.
2. During the restore process the target non-production database is created.
 - The new database name will be applied.
 - The target company name and company reference is saved.
3. During the update process the target non-production database is updated.
 - eSignatures, events and triggers that are not to be included are removed from the target database.
 - eSignatures, events and triggers that are included are applied to the target company.
 - All columns with the data type **Company** are updated to reflect the target company ID.
 - The **SysproAdmin** system-wide table is updated to indicate the company / database name cross reference for the target database.

How can I update an existing non-production company?

1. Launch the **Company Clone¹** program.
2. Select the company you want to clone at the **Company** field in the **Source** section.
3. Select the existing company you want to update at the **Company** field in the **Target** section.
4. Enable the **Force Overwrite** field.
5. At the **Start point** field select **Update**.
6. Select the **Start Clone Process** button.

Can I use a business object to clone a company?

Yes, you can use the **COM COMPANY CLONE²** to clone a company.

The XML input elements are the same as the fields in the **Company Clone³** program, except the `NonSysproCompId` element that correlates with the **Update user defined tables** field.

¹Program: IMPCCL

²Business object: COMTCC

³Program: IMPCCL



Using

Hints and Tips

- Once you have cloned a company, you have to exit SYSPRO, login to the cloned company and import a license for the cloned company using the **License Manager** program.

Referencing


Menu and Toolbar

► Start Clone Process

This starts the cloning process of the source company.



A progress bar is displayed to show the current stage of the cloning process.

Company clone

Field	Description
Source	
Company	This lets you select the source company that you want to clone. The company where you are currently logged in is displayed by default.
Backup folder	This lets you select the folder where the backup will be located.
Backup file	This lets you select the backup file if you start the cloning process with restoring the source company database, i.e. you have selected Restore at the Start point field.
Target	
Company	This lets you enter a name for the cloned company. You can select an existing company to update the database using the Force Overwrite field.
Company name	<p>This lets you enter a name for the cloned, non-production company, which <i>must</i> start with the word TEST to clearly distinguish it from production companies.</p> <p>If a valid, licensed, non-production company already is selected at the Company field, the name is automatically populated.</p> <div>  <p>The clone process will only commence if the target company is a non-production company, i.e. if the name of the target company starts with TEST.</p> </div>

Field	Description
Database	<p>This lets you enter the name of the target database, i.e. the name of the database that will be restored from the backed-up source database.</p> <p>If you are forcing an overwrite, then the database must match the original target company database.</p>
Reference	The default reference is Cloned Company , but this can be changed.
Options	
Force overwrite	Enable this to overwrite, i.e. replace the existing target company.
Disable SQL triggers	<p>triggers defined within the SQL database of the source company are disabled by default.</p> <p>You can remove the tick if you want to enable SQL triggers.</p>
Allow login	<p>Logins to the cloned, non-production company are allowed by default.</p> <p>You can remove the tick if you don't want user to login to the cloned company.</p>
Update user defined tables	Enable this to update the company columns in any user defined tables that are not included in the data dictionary.

Field	Description
Start point	<p>This lets you decide with which activity you want to start the cloning process.</p> <p>Backup</p> <p>Select this to start the process by backing up the source company database.</p> <p>Once the backup is complete, the copied database will be restored and then updated.</p> <div>  Backup schedules against the database won't be affected. </div> <p>Restore</p> <p>Select this to start the process by restoring the database from the backup you selected at the Backup file field.</p> <p>Once the backup is restored, the cloned company will be updated.</p> <div>  <ul style="list-style-type: none"> ■ Ensure no one is transacting when running the SQL restore script, as it sets the database to single user mode before restoring. ■ Although the restore script supports multi-file backups and allows defining data and log file folders, but we strongly recommended using the default folders from the SQL instance. </div> <p>Update</p> <p>Select this to start the process with updating the company ID in the database of the cloned, non-production company.</p> <div>  This is typically used as a starting point: <ul style="list-style-type: none"> ■ in a SaaS or managed instance environment where you can only update a company (the backup and restore options will be unavailable). ■ when the SQL admin login does not have permission to backup or restore a database. </div>

Field	Description
SQL data folder	This indicates the folder used by SQL to store the data files. This displays the SQL instance default.
SQL log folder	This indicates the folder used by SQL to store the log files. This displays the SQL instance default.
Include	<div>  <p>These options are disabled by default, which will result in eSignatures, events and triggers to be removed from the database.</p> <p>Evaluate carefully when enabling these options to clone the company. Including eSignatures, events and triggers could cause emails to be sent and third party data to be updated when using the test environment.</p> </div>
eSignatures	<p>Enable this to copy the eSignatures defined at company level from the source to the target company.</p> <div>  <p>As eSignatures are defined at system level, operator or role level are stored in the system database and are always copied to the cloned company.</p> </div>
Events	Enable this to copy the events defined in the source company to the target company.
Triggers	Enable this to copy the triggers defined in the source company to the target company.



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