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Lab Guide

Update Sets: Best Practices to Move Code Smoothly

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Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

Update Sets allow you to capture configurations and move those configurations to another instance. The goal of this lab is to create a new Update Set.

Lab 1
Create a new Update Set

Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you.
2. Log on with provided credentials.

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Customize your Dev Hub (Parent) Instance

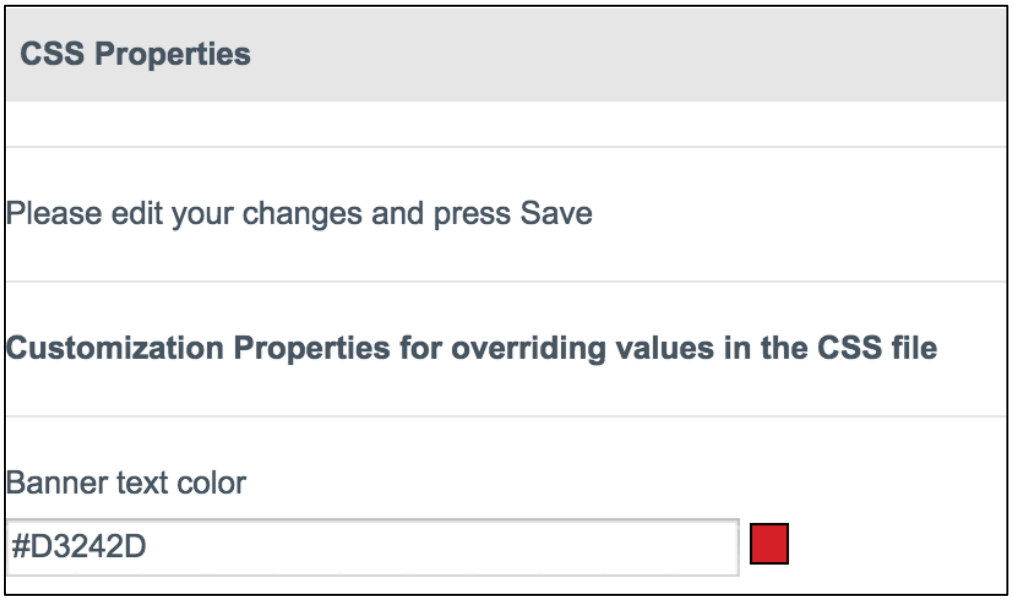
It is important to know on which instance you are working. You can use System Properties and CSS to make that clear.

1. Log on to your **parent** instance.
2. Navigate to **My Company**.
3. Change banner text to **Dev Hub Parent and click Update:**



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4. Navigate to **System Properties > CSS and** change the **Banner text color** to **#D3242D** (a nice familiar red).



5. Click **Save**, then refresh browser window to see your changes reflected in the banner.



Customize your Child Instance

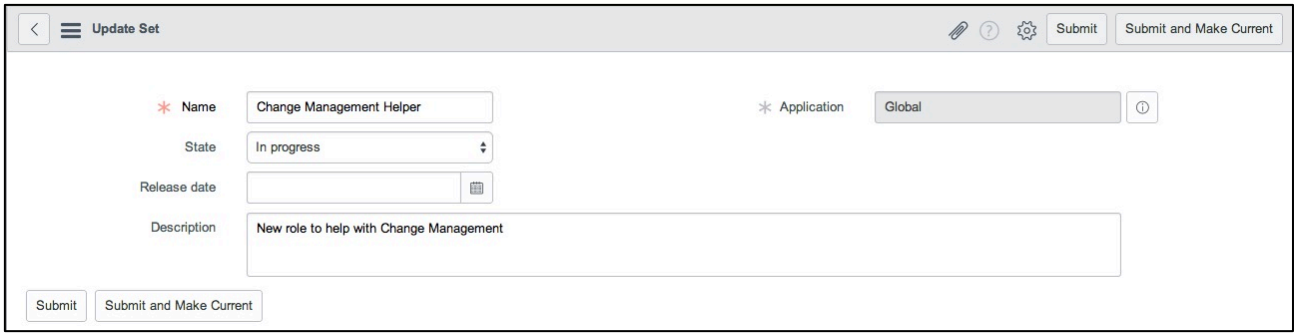
Now, repeat the steps above on your respective child instance, using the title **Dev Hub Child** and the color **#339933** are acceptable.

1. Log on to your **child** instance.
2. Navigate to **My Company**.
3. Change **Banner text** to the title **Dev Hub Child**, and click **Update**.
4. Navigate to **System Properties > CSS**.
5. Change **Banner text color** to **#339933**, click **Save** and refresh your browser once more.

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Create an Update Set (Child Instance)

1. Navigate to **System Update Sets > Local Update Sets**.
2. Click the **New** button.
3. Give the update set a name and description.
   - Name: **Change Management Helper**
   - Description: **New role to help with Change Management**

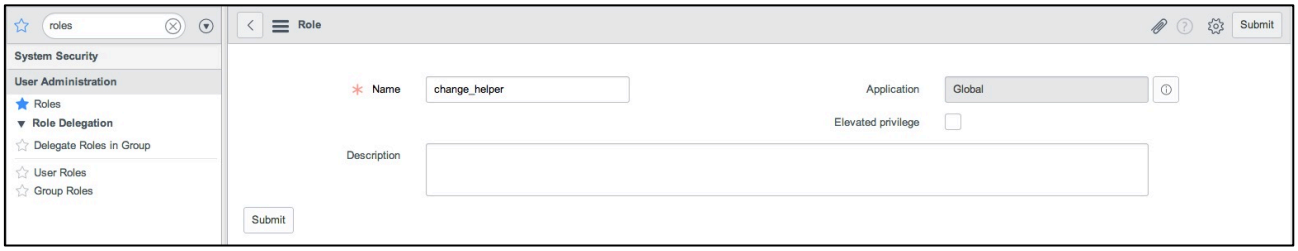


Note: You do not want to select Submit and make Current. This is intentional.

4. Click **Submit**.

Create a new Role (Child Instance)

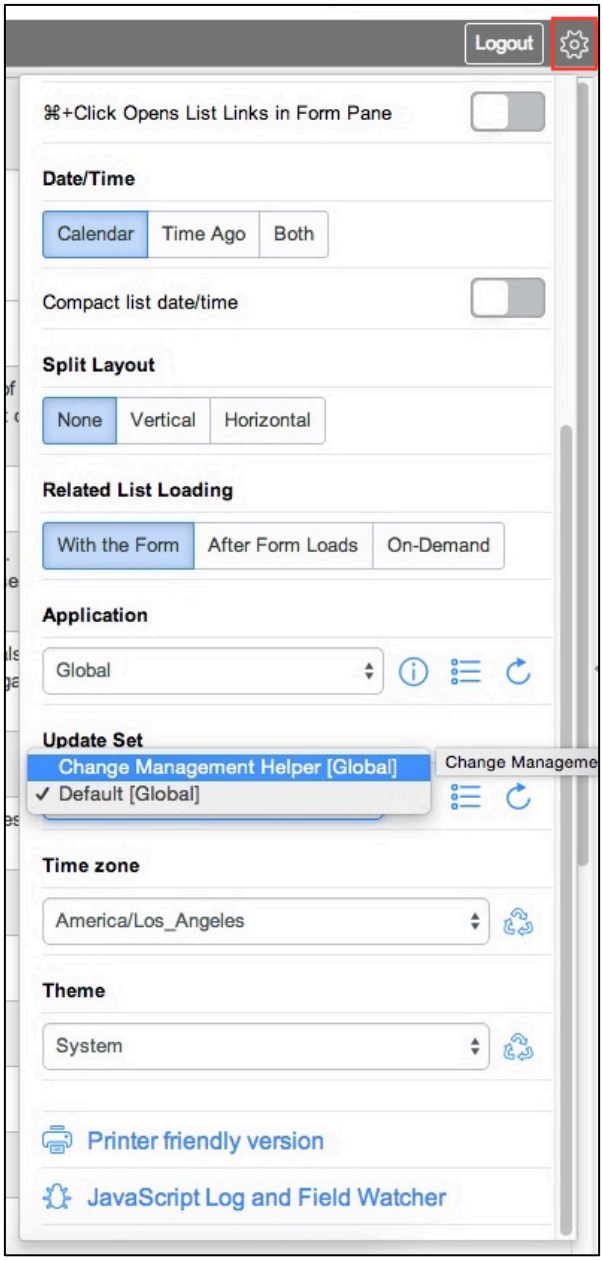
1. Navigate to **User Administration > Roles**.
2. Click the **New** button.
3. Create a role called **change_helper.**



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Select an Update Set

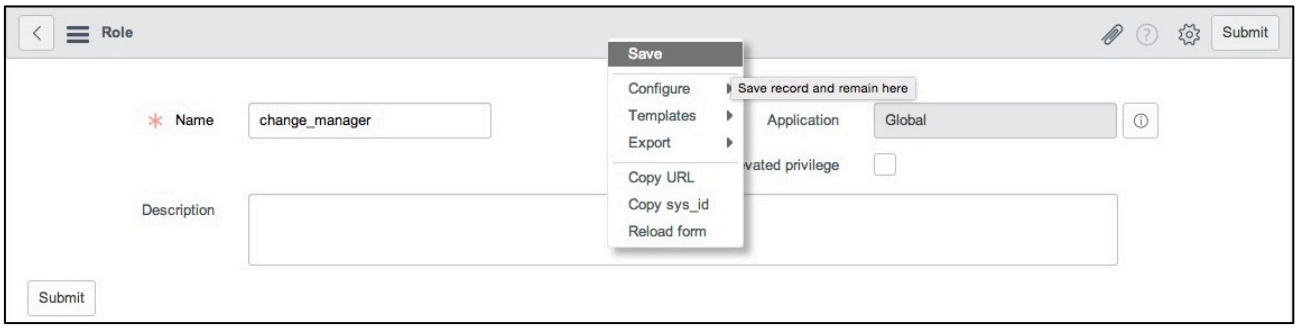
1. In the banner system menu, scroll to the bottom and select **Change Management Helper** in your **Update Set Picker** picker. This will ensure all files you add going forward will be associated with your update set.



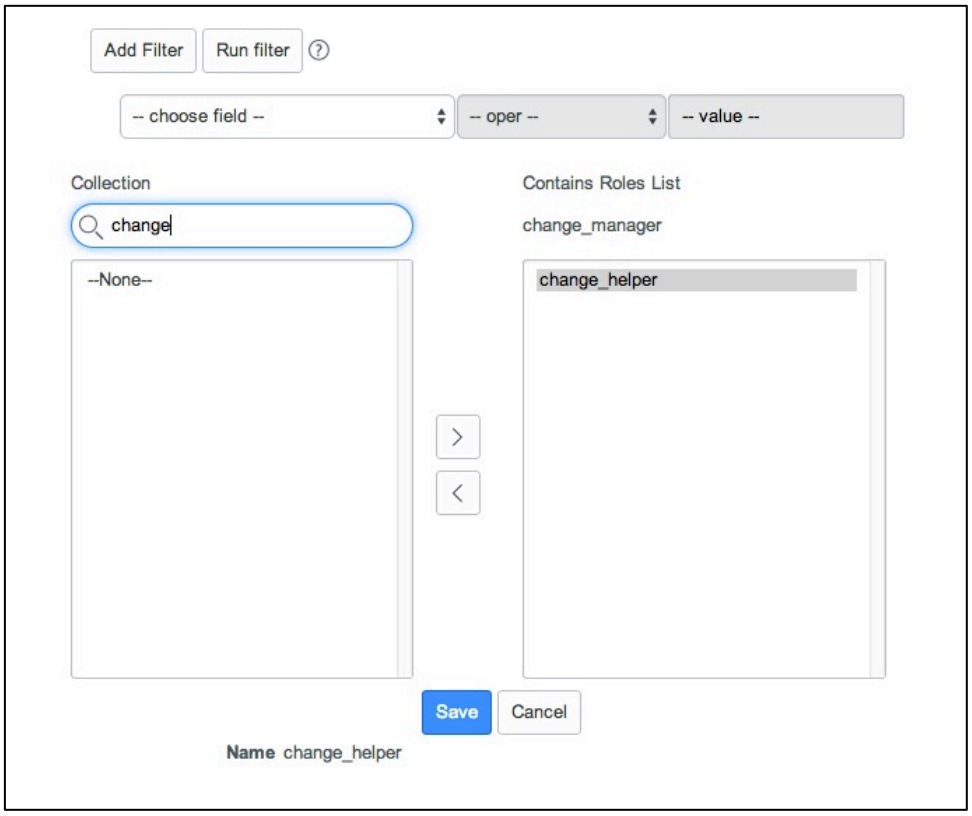
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Configure the change_manager role

1. Navigate to **User Administration > Roles.**
2. Click the **New** button.
3. Create a role called **change_manager**.
4. Right-click and **save** the record.



5. In the **Contains Roles** related list, click **Edit** and add the **change_helper** role, and **Save**.



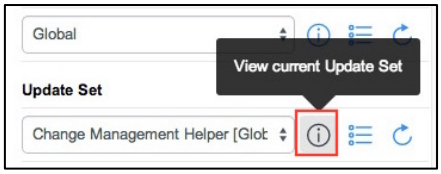
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Create three Additional Update Sets

1. Following the steps above, create three more update sets with the following customizations in each. Instructions for performing each customization are contained in the pages that follow.

Update Set Name	Update Set Description	Customization
Change form V2	Remove Impact	Remove the impact field from the form
Category Change	Correct Telecom	Change Telecom category label to be TCOM
Change Workflow Update	Change Comprehensive approvals	Check out Comprehensive Change workflow, Change Duration from 2 to 3 days. Republish update set.

2. Navigate to each update set; you can either access the update set record by navigating to **System Update Sets > Local Update Sets** or by clicking the list icon next to the update set picker in the Banner system menu (Gear icon).



3. Change the state to **Complete** and click **Update**.

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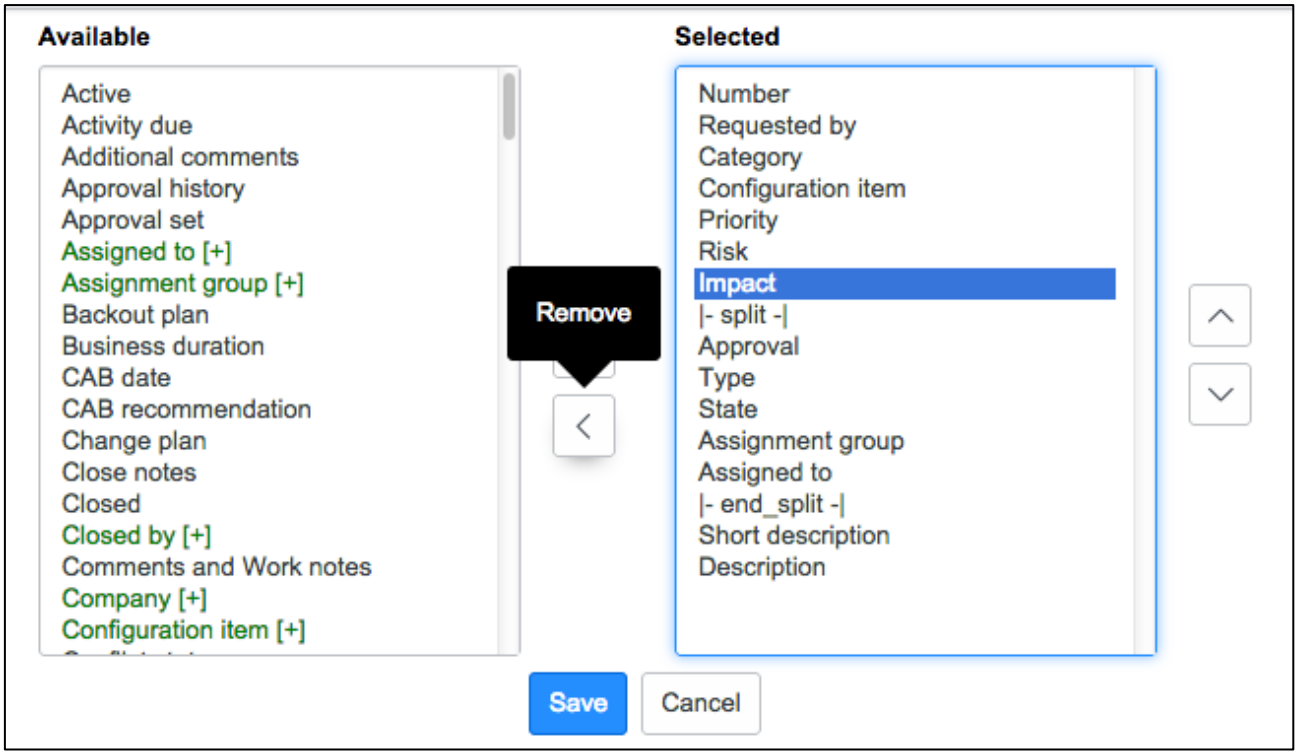
Perform 'Change form V2' Update Set Customizations (on Child instance)

1. Create **Local Update Set** named '**Change form V2'** and make it your **current update set** using **Submit and Make Current**.

2. Navigate to **Change > All** and click into any of the **CHG** numbers listed (e.g. CHG0000015).

3. Right-click on the header bar and click **Configure > Form Layout**.

4. Select the **Impact** item shown in the **Selected** list (right-side) and click the **<** arrow to move it to the **Available** list (left-side). Click **Save**.



5. Verify that the **Impact** field is no longer shown on the form.

6. Navigate to the **current update set**, set the State to **Complete** and click **Update**.

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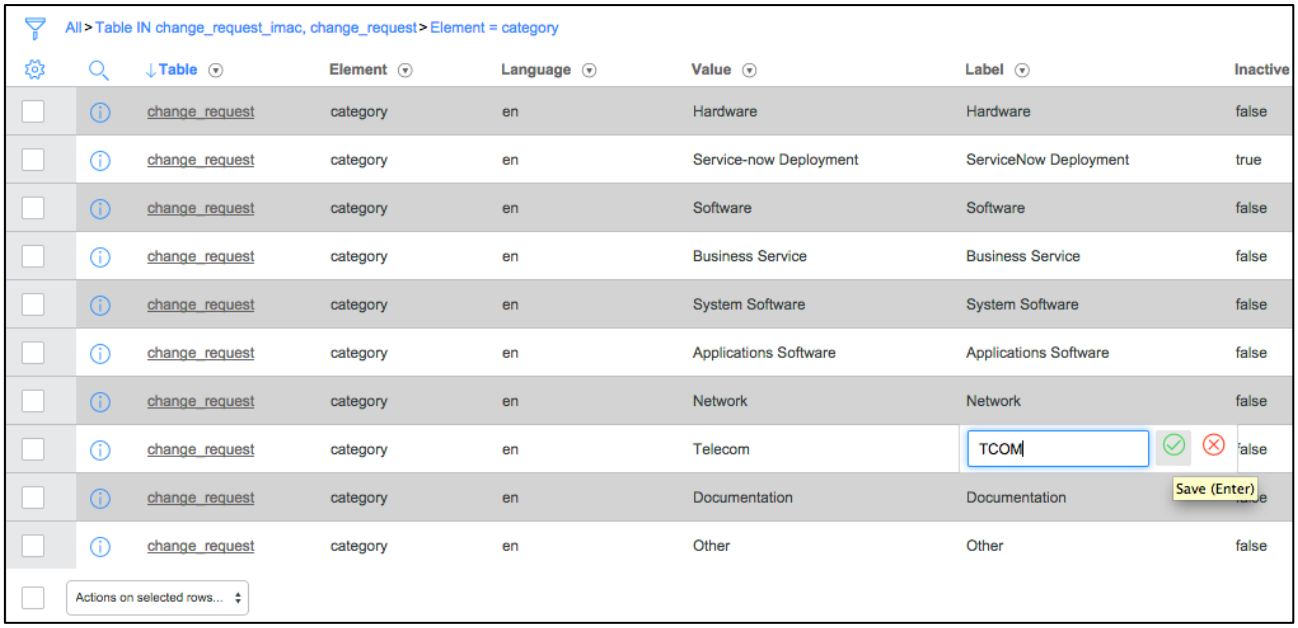
Perform 'Category Change' Update Set Customizations (on Child instance)

1. Create **Local Update Set** named **'Category Change'** and make it your **current update set** using **Submit and Make Current**.

2. Navigate to **Change > All** and click into any of the **CHG** numbers listed (e.g. CHG0000015).

3. Right-click on the **Category** field label and click **Show Choice List**.

4. Double-click on the cell under the **Label** column that has a value of **Telecom** and change the value to **TCOM**, then click the **green check** icon to save the change.



5. Verify your customization by navigating back to any **CHG** record. Click the **Category** field and note that **TCOM** has replaced Telecom in the **Choice List**.

6. Navigate to the **current update set**, set the State to **Complete** and click **Update**.

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Perform 'Change Workflow Update' Update Set Customizations (on Child)

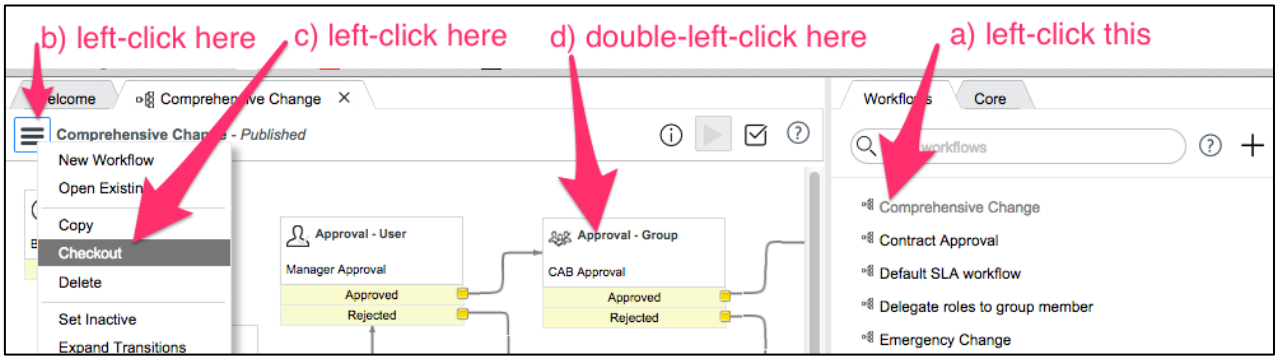
1. Create **Local Update Set** named **'Change Workflow Update'** and make it your **current update set** using **Submit and Make Current**.
2. Navigate to **Workflow > Workflow Editor**

   a) Click **Comprehensive Change** listed under the **Workflows** tab show on the right pane. This opens the **Comprehensive Change** workflow on the left pane.

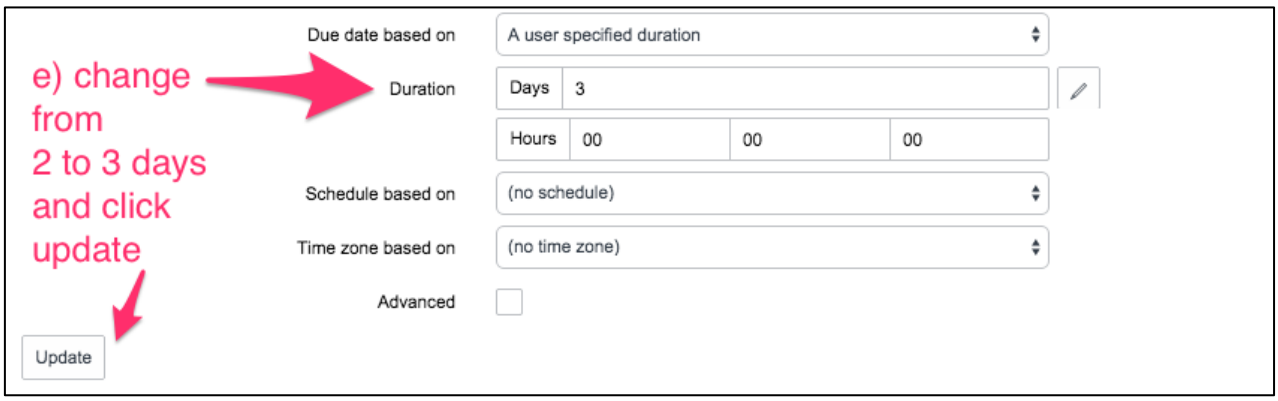
   b) Click on **hamburger icon** in the upper-left corner of left pane.

   c) Click **Checkout**.

   d) Double-click **Approval – Group** workflow activity.



   e) Change the **Duration** from 2 to **3** days and click **Update**.



3. Click the **hamburger icon** (step b) and click on **Publish**.
4. Close tab and go back to the tab from which you clicked **Workflow Editor**.
5. Navigate to the **current update set**, set the State to **Complete** and click **Update**.

Lab Success Verification

You know how to create and manage update sets.

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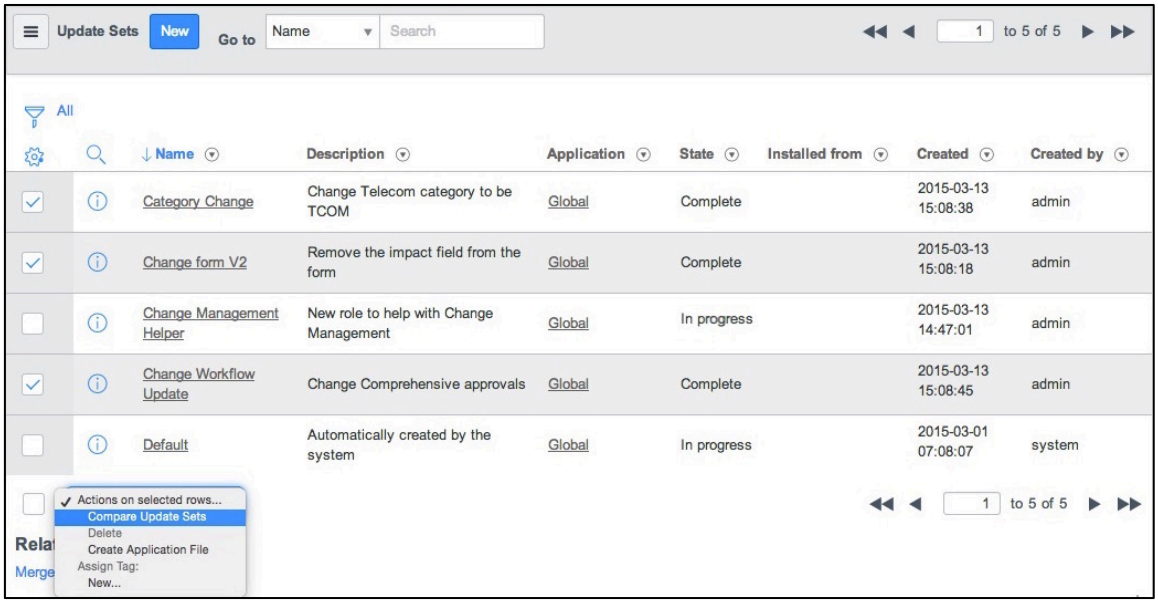
Lab Goal

ServiceNow provides features for understanding conflicts before you move your update set and correct them. In this lab we will be assessing conflicts and merging the 3 Update Sets from the last lab into 1.

Lab 2
Prepare Update Set to move

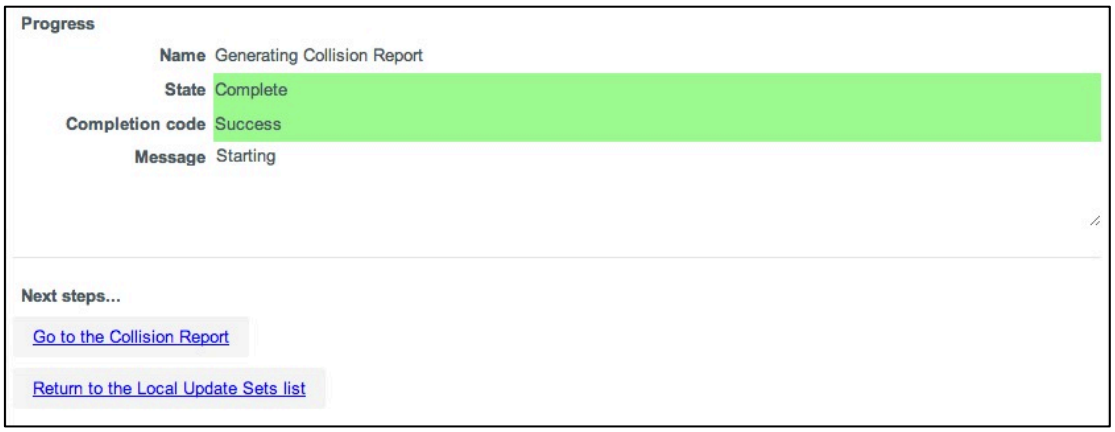
Create Collision Report

1. Navigate to **System Update Sets** > **Local Update Sets**.
2. Click the **checkbox** next to the three update sets created in the last portion of the previous lab.
3. Click **Compare Update Sets** from the list choice options.



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4. Go to the collision report by clicking on the **Go to the Collision Report** link.

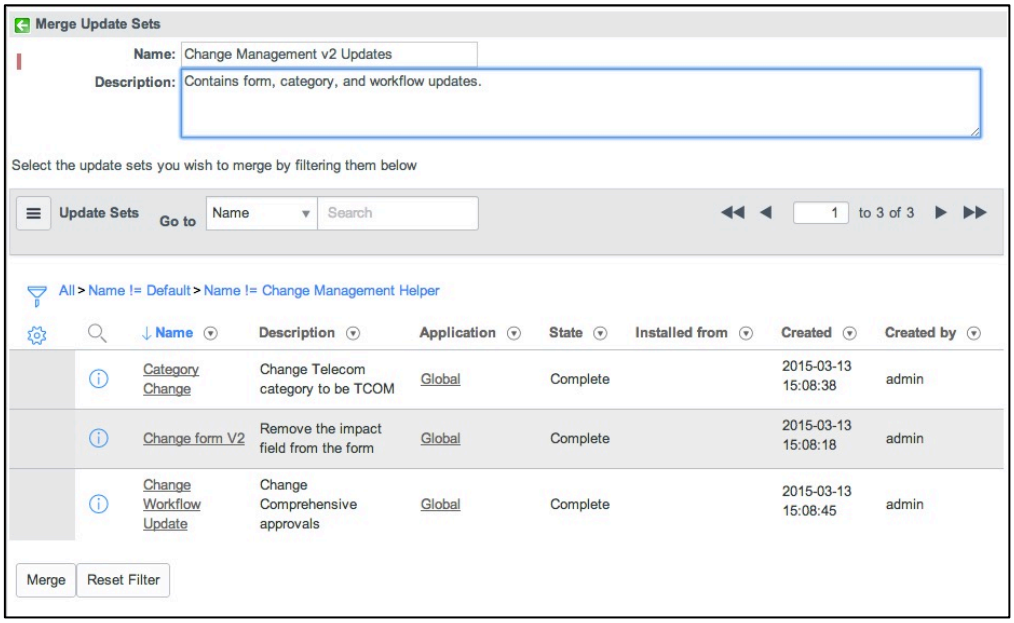


Merge Update Sets

1. Navigate to **System Update Sets** > **Merge Complete Sets**.

2. Make sure that only the three update sets shown below are listed in the related list. If not, filter the list so only the three update sets you want are shown. To filter out an update set, right-click on the name (e.g. Lab Management) and select **Filter Out**.

3. Enter a meaningful **Name** and **Description**.



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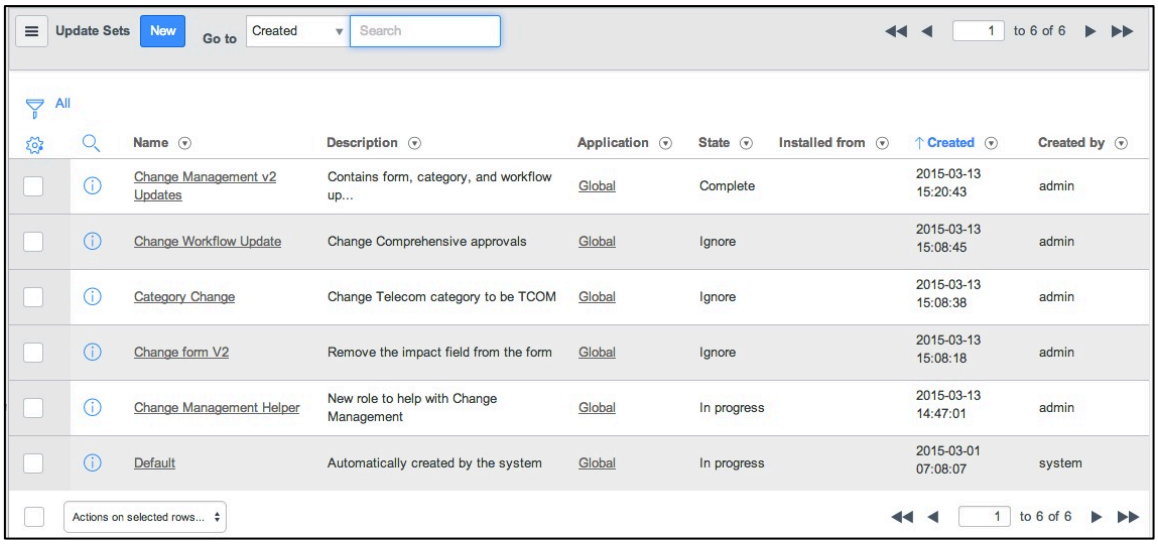
4. Click **Merge** and click **OK** on the screen prompt.

5. Navigate to your new **'Change Management v2 Updates'** Update Set, and mark the update set as **Complete.** Click **Update**.

Lab Success Verification

1. Navigate to **System Update Sets** > **Local Update Sets**.

2. You should see your merged update sets from the first lab in a state of Ignore and the newly created merged update set in a state of Complete.



You know how to create a collision report.

You know how to merge update sets.

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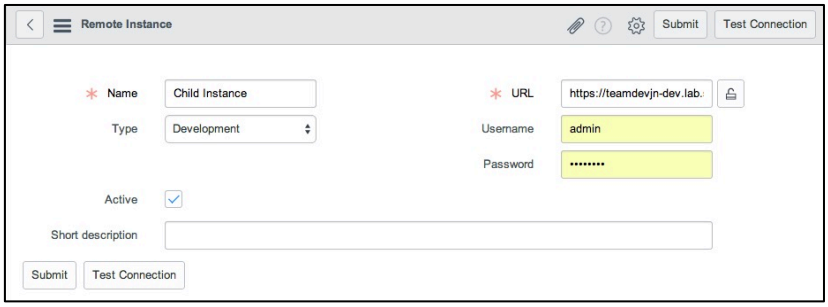
Lab Goal

Now that we have an Update Set with customizations complete, we are going to promote this Update Set to another instance.

Lab 3
Promote Update Set

Create Update Source (parent)

1. Login to your parent instance and navigate to **System Update Sets** > **Update Sources.**
2. Click **New**.
3. Enter a **Name**, the URL for your child lab instance, the **Username** and **Password**.

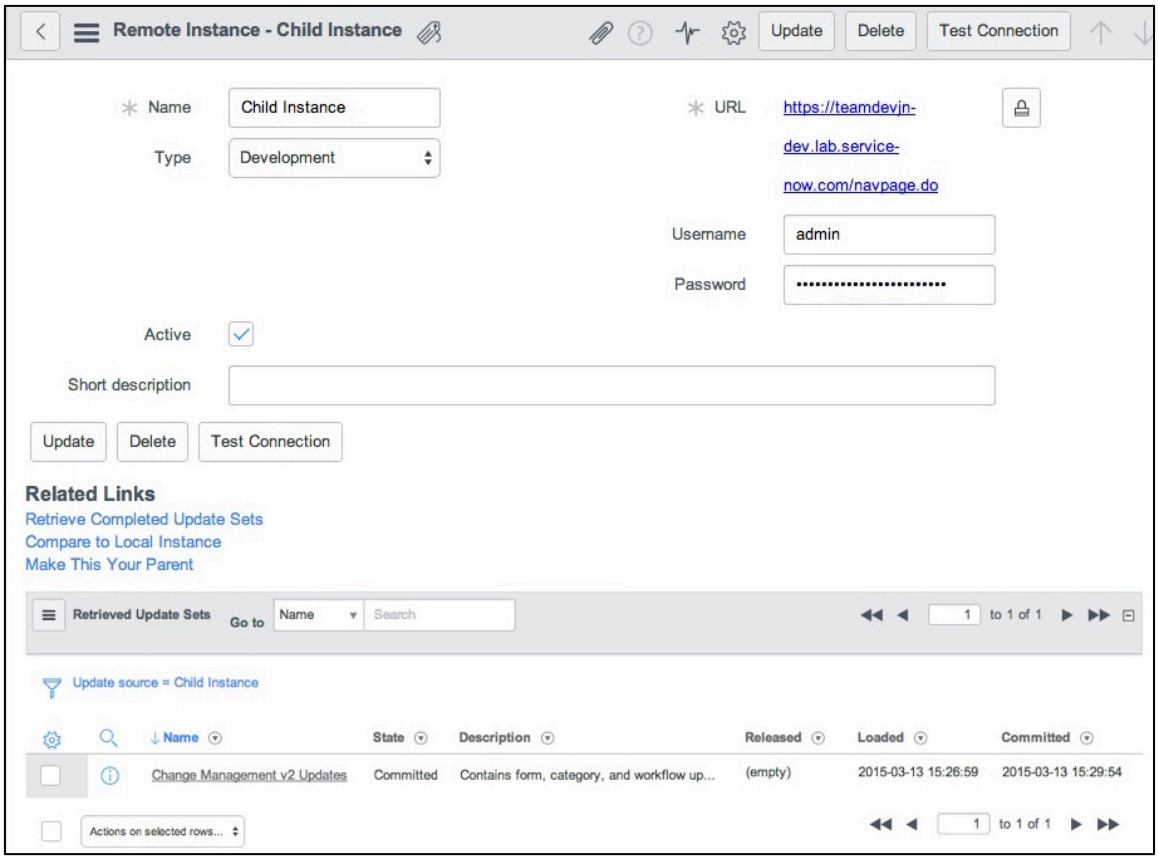


4. Click **Test Connection**.
5. Click **Submit**.

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Retrieve Update Sets

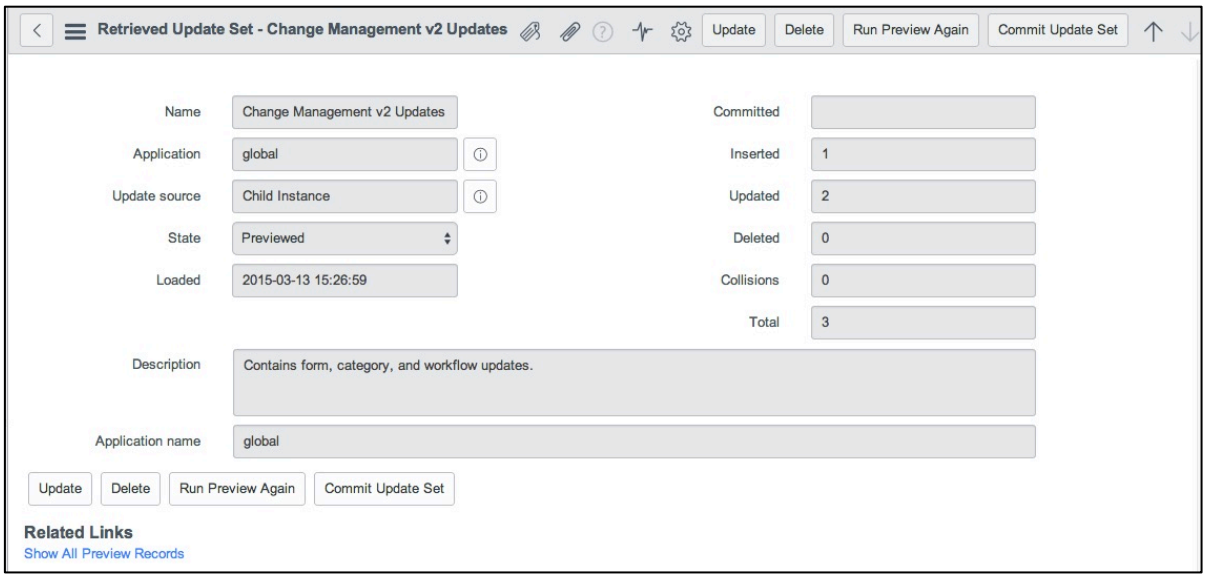
1. Navigate to **System Update Sets** > **Update Sources > Your Data Source**.
2. Click **Retrieve Completed Update Sets**.
3. Once complete, open your '**Change Management v2 Updates'** update set.



4. Click **Preview Update Set**.

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5. Click **Commit Update Set**.



Lab Success Verification

You know how to set up a Data Source.

You know how to Retrieve, preview, and commit an update set.

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Lab Goal

Now that we have made an Update Set with customizations committed successfully on another instance, we are going to solve a problem.

Lab 4
Missing Updates

Complete Update Set (child)

1. Navigate to System **Update Set > Local Update Sets > Change Management Helper** in your child instance.
2. Change the state to **Closed** and click **Update**.

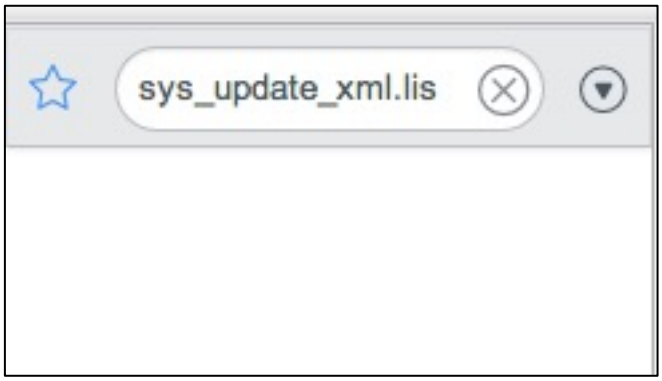
Retrieve Update Sets (parent)

1. Navigate to **System Update Sets** > **Update Sources > Your Data Source** in your parent instance.
2. Click **Retrieve Completed Update Sets**.
3. Once complete, open your '**Change Management Helper'** update set.
4. Click **Preview** (but do not Commit the update set after the Preview).
5. Review your '**Change Management Helper'** Update Set. Observe that there is an update for our new change_manager role, and the reference of the change_helper role to the change_manager role, but where is the change_helper role itself?

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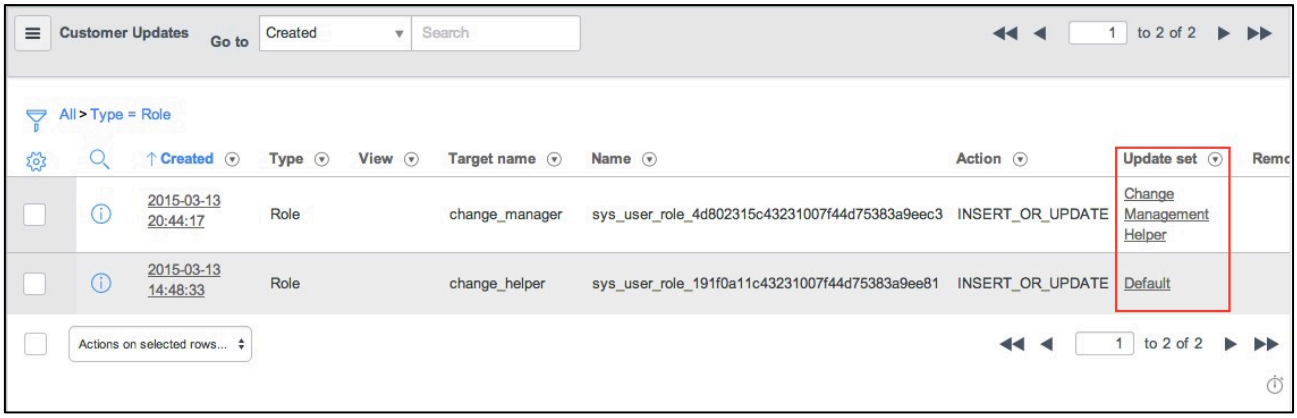
Locate and correct missing update (child)

1. In the left navigator, enter **sys_update_xml.list**



2. Right-click and **Show Matching** on the type **Role**.

3. Observe that the **change_helper** role is in the **Default** Update set. Let's fix this.



4. Open the **change_helper** role by clicking on the **Created date**.

5. Change the **Update Set** field from **Default** to **Change Management Helper.** Click **Update.**

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Retrieve Update Set Again (parent)

1. Navigate to **System Update Sets** > **Update Sources > Your Data Source** in your parent instance.
2. Click into the **'Change Manage Helper' Retrieved Update Set**, verify that it is in the **Previewed** state, and click **Delete**. You will get a Confirmation dialog regarding the items that you are about to delete in the retrieved update set. Click **Delete**.
3. Click **Retrieve Completed Update Sets**.
4. Once complete, open your **'Change Management Helper'** update set.
5. Click **Preview**. Observe that there are now two entries of type **role**. One for **change_manager** and one for **change_helper**. Click **Commit Update Set**.

Lab Success Verification

You know how to locate updates made.

You know how to correct an update set mistake.

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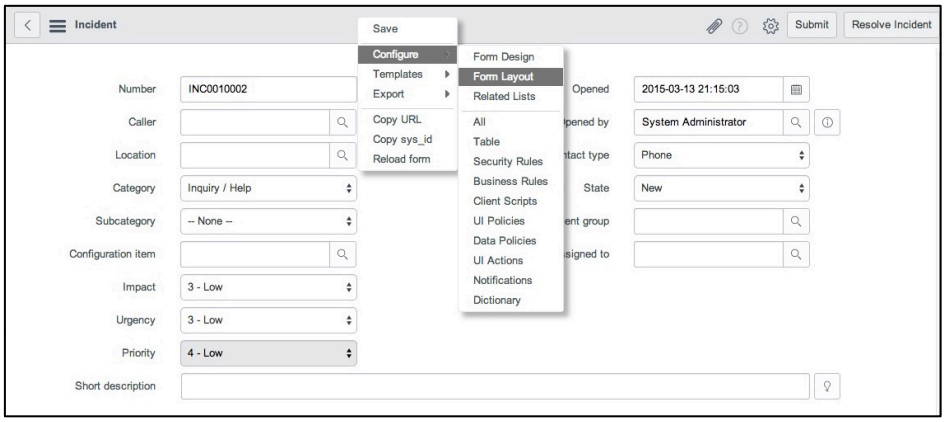
Lab Goal

Lab 5
Update Set Collision Detection

For stacks that do not use Team Development, best practice dictates that customizations are always made from the bottom of the stack and moved upward. This lab illustrates what occurs for two scenarios when this best practice is not followed. In the first scenario, a customization is made on the child then a customization for the same element is made on the parent. For the second scenario, the time-order of the customizations is reversed: first parent, then child. Retrieving the update set associated with the first scenario generates a preview error while that for the second does not, resulting in the parent's customization being overwritten by that of the child's. Since we cannot guarantee that all parent changes will be made after those of a child, the best practice ensures that all customizations will be preserved.

Modify Incident Form Layout (child)

1. Create a new **Update Set** on the Child instance and set it as your current update set.
2. Navigate to **Incident** > **Create New.**
3. Right-click on header and choose **Configure**> **Form Layout.**

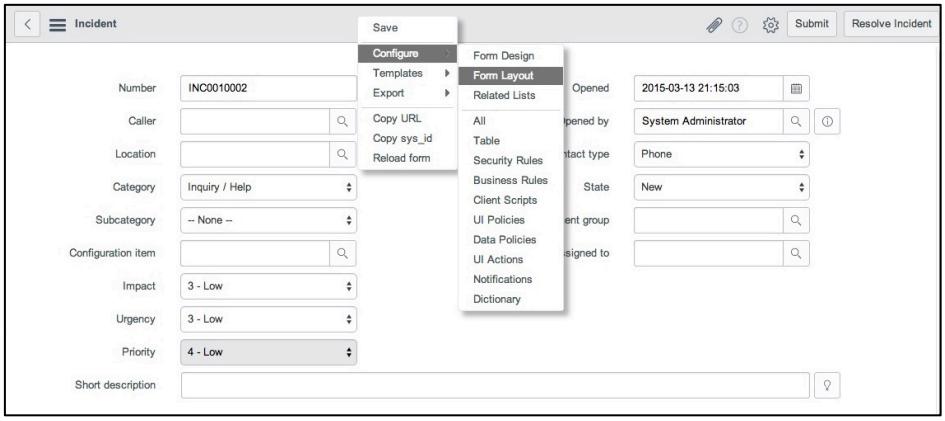


4. Remove any field from the form.
5. Click **Save**.
6. Mark update set as **Complete**.

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Modify Incident Form Layout on Parent Instance

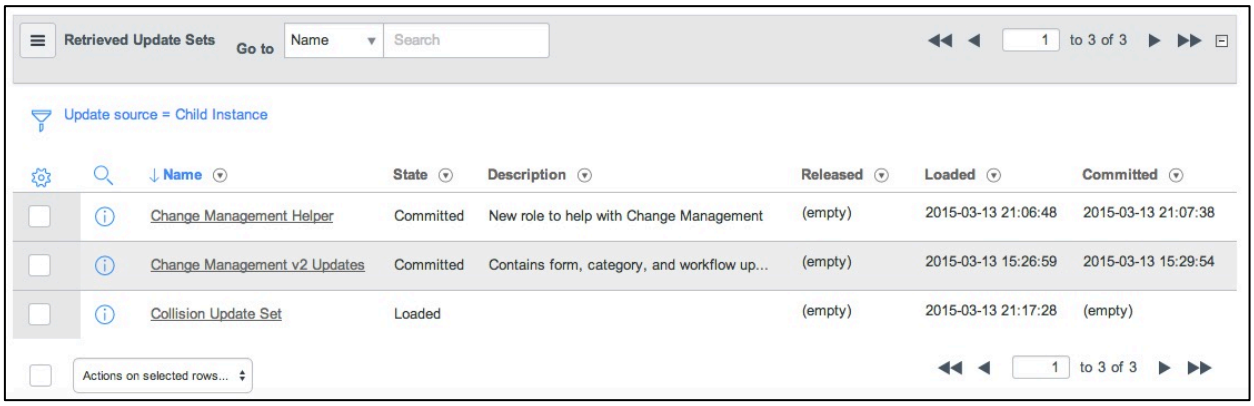
1. Navigate to **Incident** > **Create New.**
2. Right-click on header and choose **Configure** > **Form Layout.**



3. **Remove** any field from the form.
4. Click **Save**.

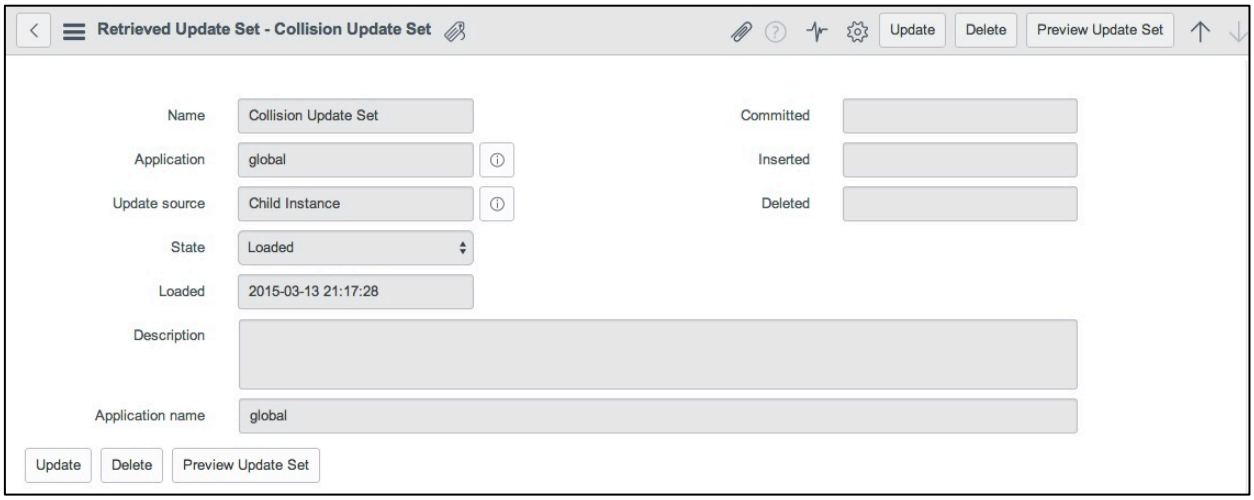
Retrieve Update Sets

1. Navigate to **System Update Sets** > **Update Sources > Your Data Source** on the Secondary Instance.
2. Click **Retrieve Completed Update Sets**.
3. Once complete, click **Retrieved Update Sets**.

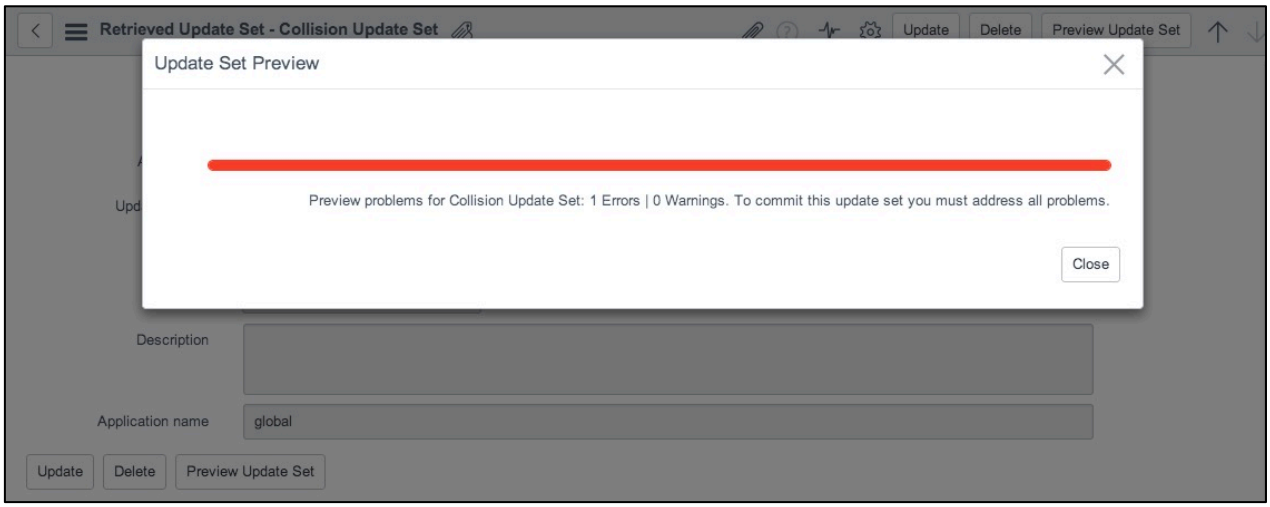


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4. Open **Retrieved Update Set**.

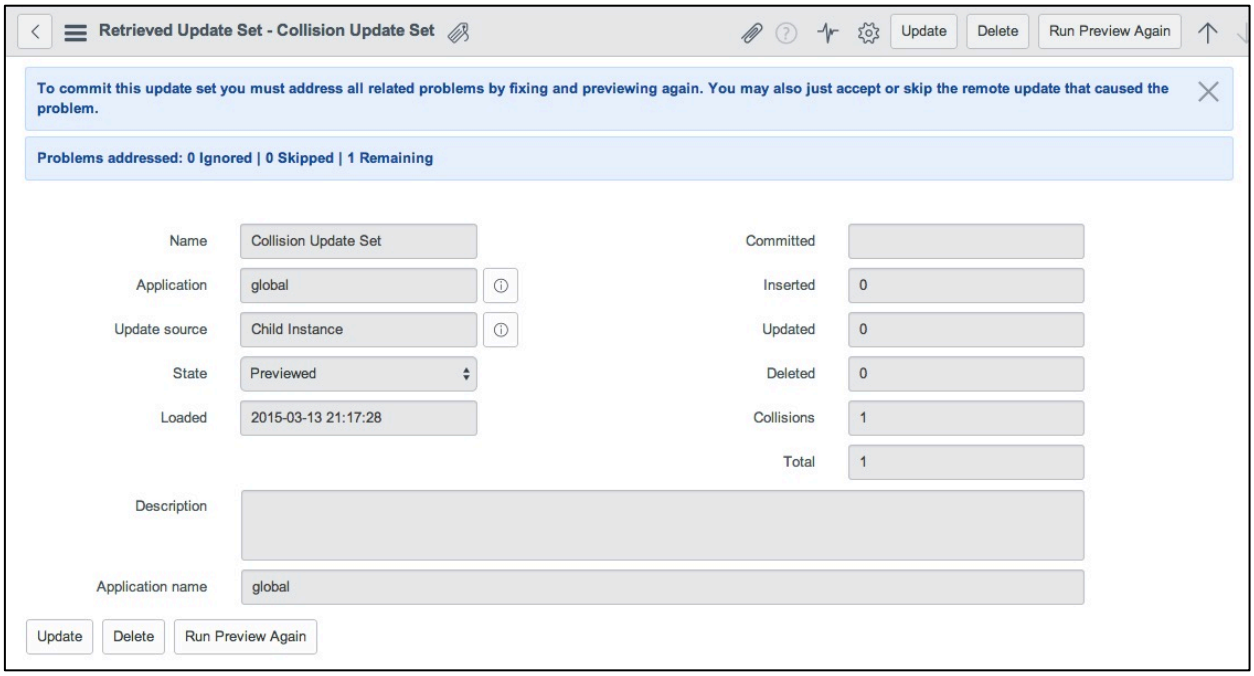


5. Click **Preview Update Set.**



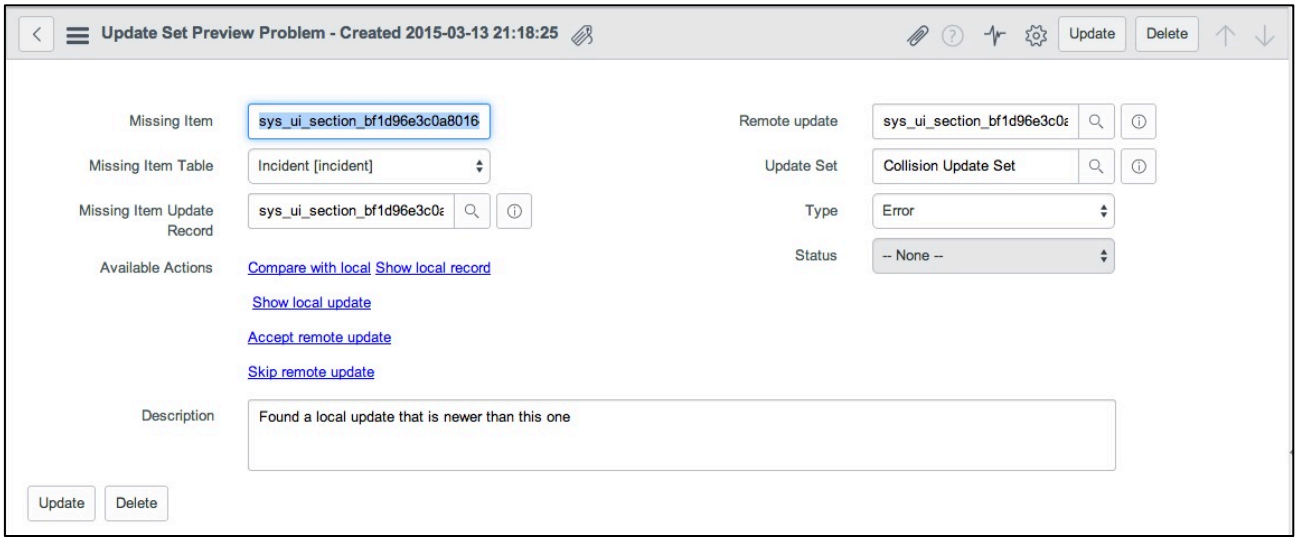
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6. Click **Show Preview Problems.**



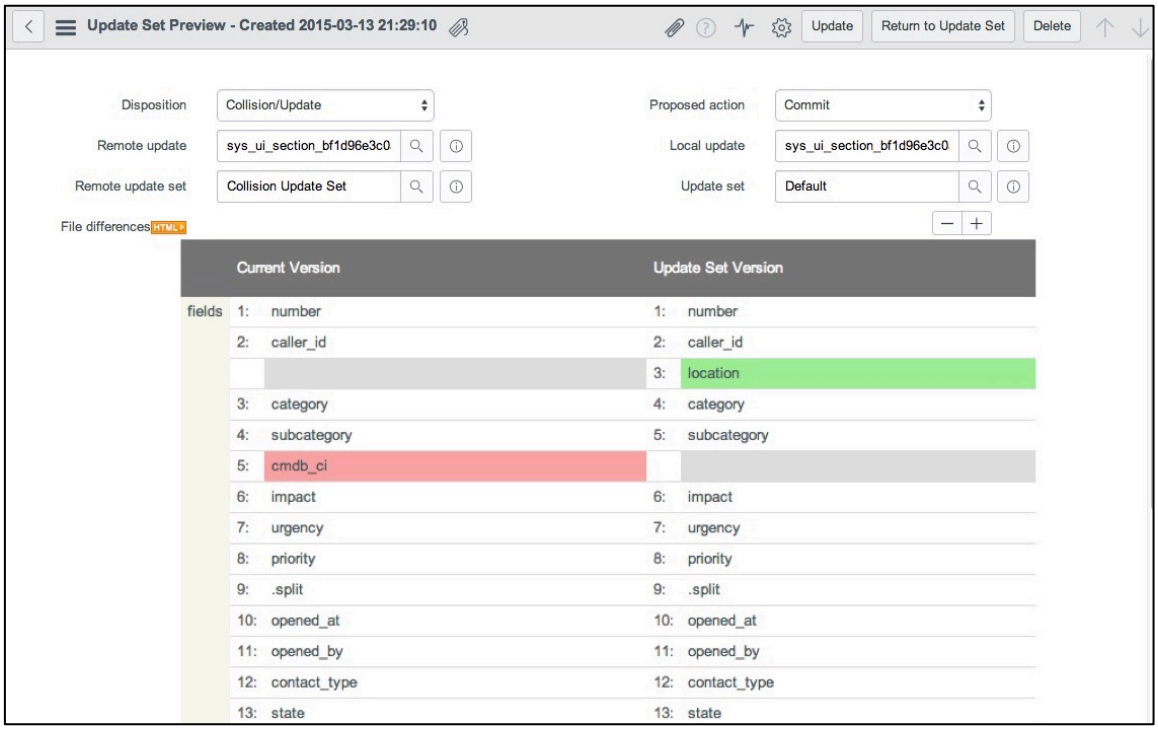
7. Find the **Update Set Preview Problems** related list and **open** the record.

8. Click **Compare with local**. Notice the **Preview Problem Description**.



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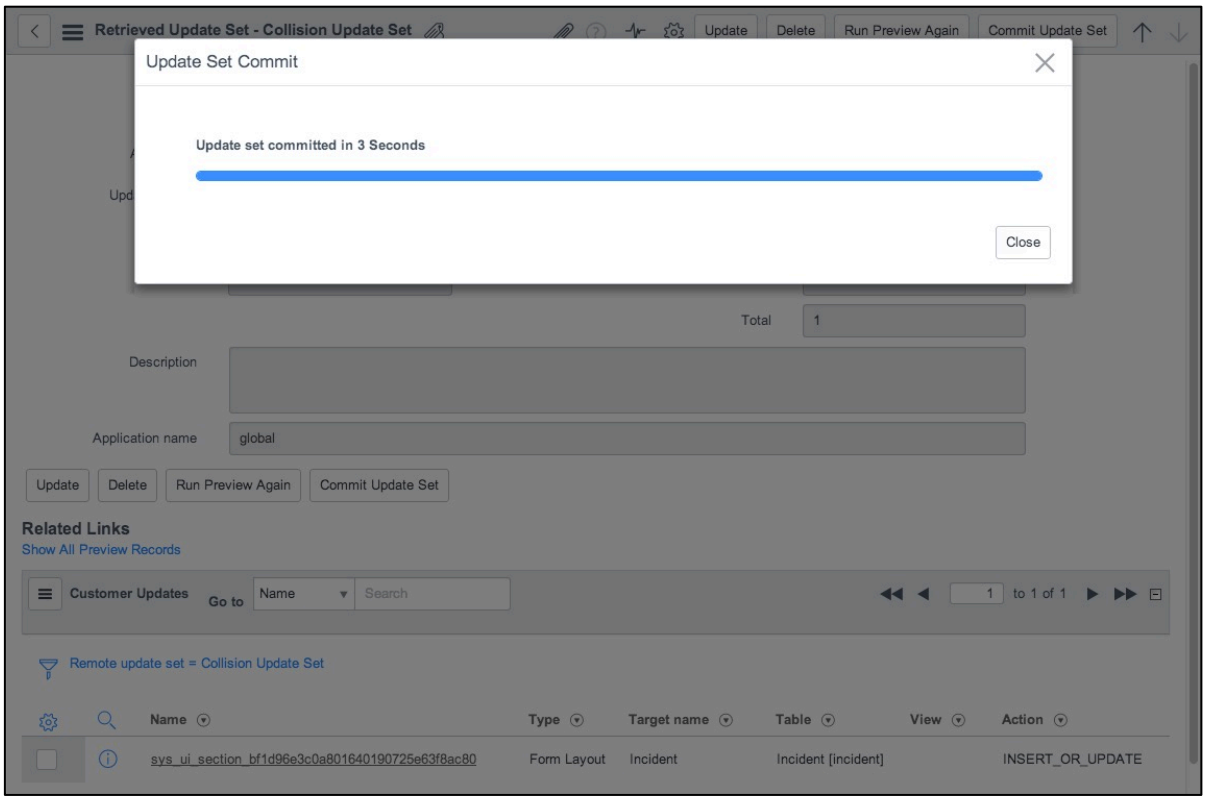
9. Either choose **Accept remote update** OR **Skip remote update** from the Available Actions choices in the **Update Problems** related list.



10. Navigate to **System Update Sets** > **Retrieved Update Sets > Your Update set.**

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11. Click **Commit Update Set.**



Now, repeat this lab, but perform the customization on the parent first, then the child. When you retrieve the update set you created for this second part, notice that no preview problems are reported. When making your customization for this second part, choose a different field to remove from the parent's form than you do for the child's form. After you commit the update set notice that the child's customization is the final customization on the parent.

Lab Success Verification

You understand the issues involved in making customizations out-of-stack-order and the importance of starting each customization on dev then moving it up-stack..

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