knowledge16
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Lab Guide

Update Sets Best Practices

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Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

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Lab Goal

Update Sets allow you to capture configurations and move those configurations to another instance. This lab explains how to set up your lab instances, create a new update set, and capture some changes within the update set and some **not** in the update set (we fix later).

Lab 1.0
Create and Edit an 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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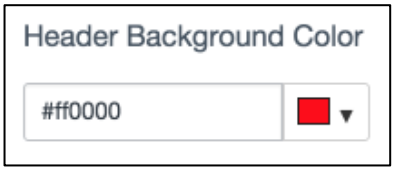
Customize the Dev Hub Instance (Parent)

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

1. Log on to the **parent** instance.
2. Navigate to **System Properties > Basic Configuration UI16**.
3. Change **Page header caption** text to **Dev Hub Parent**.



4. On the same screen, change the **Header Background Color** to any **red color (#ff0000)**.



5. Click the **Save** button in the top right of the screen to see the changes reflected in the banner.



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Customize the Child Instance

Repeat the steps above on your respective child instance, using the title **Dev Hub Child** and the color **green (#339933)**.

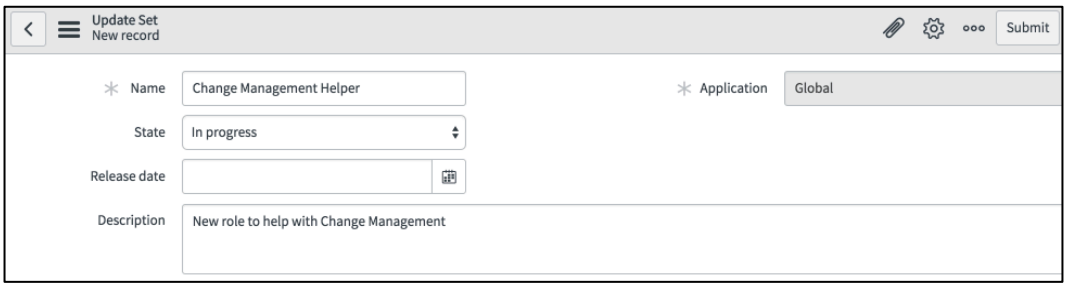
1. Log on to the **child** instance.
2. Navigate to **System Properties** > **Basic Configuration UI16**.
3. Change **Page header caption** text to **Dev Hub Child**.
4. On the same screen, change the **Header Background Color** to any **green color (#339933)**.
5. Click the **Save** button in the top right of the screen to see your changes reflected in the banner below:



Create an Update Set (Child Instance)

1. In the **child** instance, navigate to **System Update Sets > Local Update Sets**.
2. Click **New**.
3. Give the update set a name and description.

   Name: **Change Management Helper**
   Description: **New role to help with Change Management**



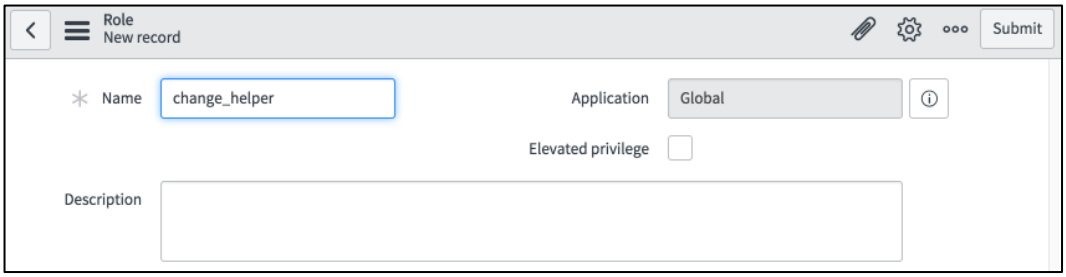
   Note: Do not select "Submit and make Current." This is intentional. If you do, return to the list of Local Update Sets, find the update set **Default** and make that the **Current** update set.

4. Click **Submit**.

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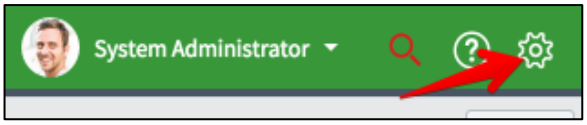
Create a New change_helper Role (Child Instance)

1. In the **child** instance, navigate to **User Administration > Roles**.
2. Click **New**.
3. Set the **Name** to **change_helper** and click **Submit** to save the new role.

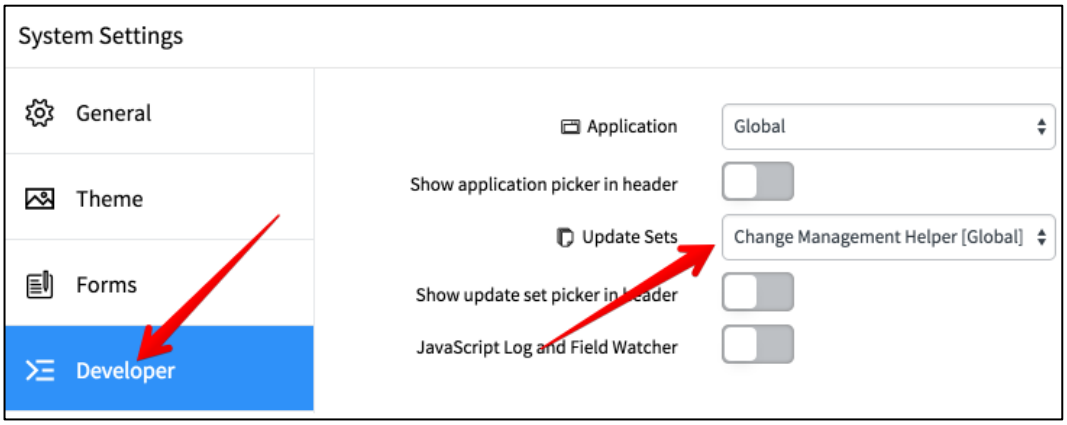


Select an Update Set (Child Instance)

1. In the banner header, click the gear icon in the top right to open the **System Settings** menu.



2. Click the **Developer** tab and change the **Update Sets** value to the new **Change Management Help** update set.

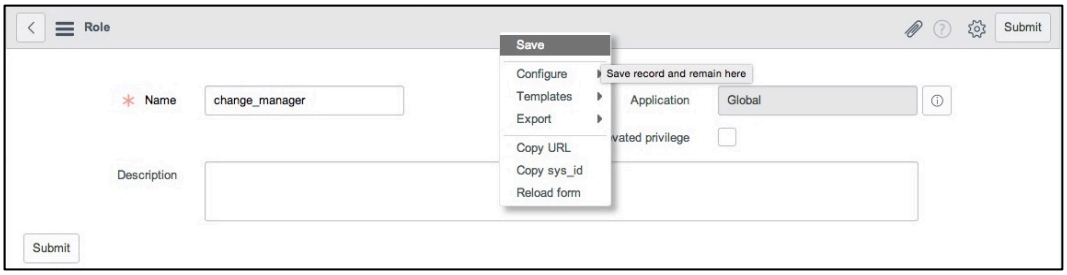


Note: This ensures all files you add are associated with the update set. Changes made before this point are **not** captured in the update set, intentionally. You learn how to fix that later.

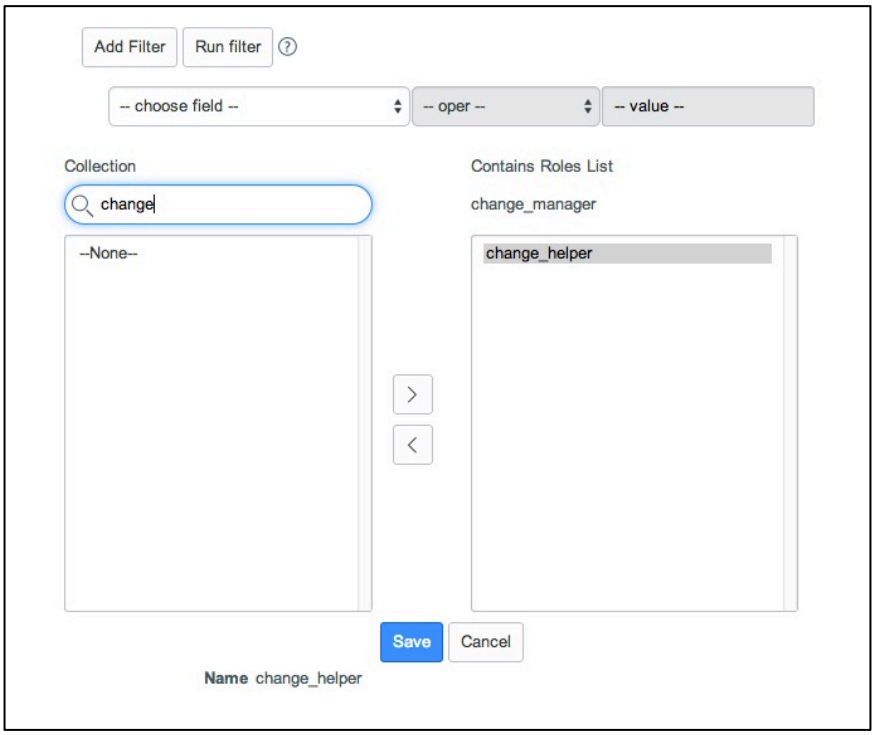
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Configure a New change_manager Role (Child Instance)

1. Navigate to **User Administration > Roles**.
2. Click **New**.
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. Click **Save**.



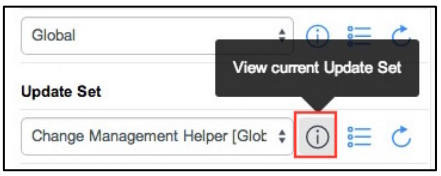
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Create Three Additional Update Sets

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

Update Set Name	**Update Set Description**	**Customizations** See following pages for full instructions
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. Either access the update set record by navigating to **System Update Sets > Local Update Sets** or by clicking the **gear** icon in the banner header to open **System Settings**, opening the **Developer** tab, and clicking the **information** icon next to the update set name.



3. Change the state to **Complete**. Click **Update**.

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Perform 'Change Form V2' Update Set Customizations (on Child Instance)

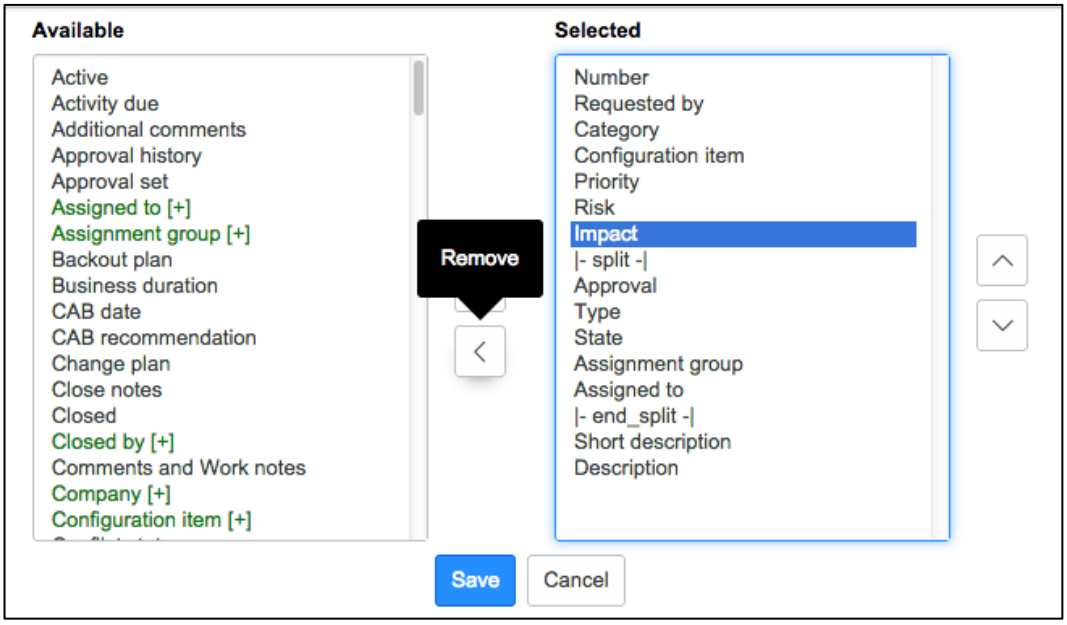
1. Create **Local Update Set** named '**Change form V2'** and make it your **current update set** using the **Submit and Make Current** button.

   Note: If you forget to click the **Submit and Make Current** button, go back to the update set record and click the **Make This My Current Set** link under the **Related Links** section.

2. Navigate to **Change > All** and click into any of the **CHG** records 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 its **State** field to **Complete**. Click **Update**.

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

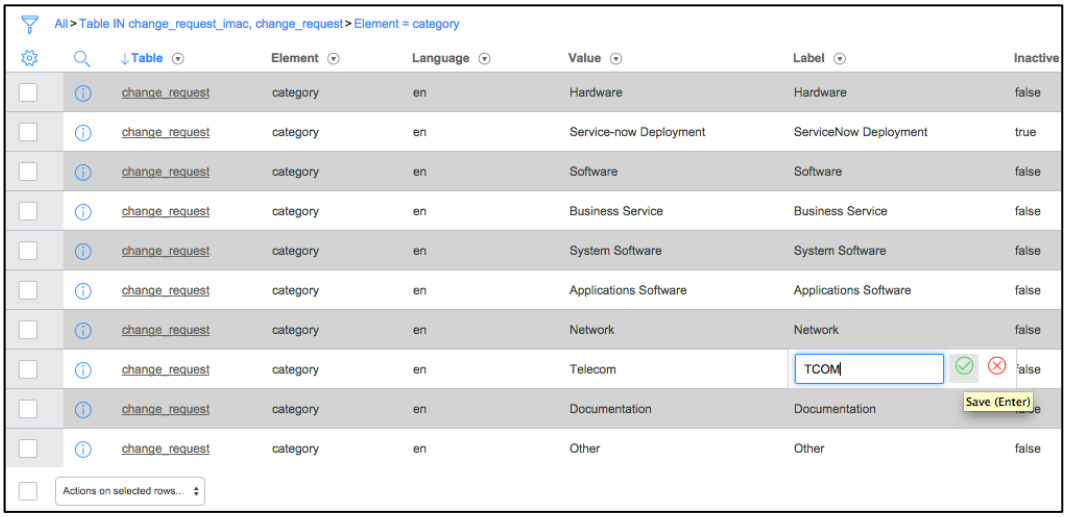
1. Create **Local Update Set** named **Category Change** and make it your **current update set** using **Submit and Make Current**.

   Note: If you forget to click the **Submit and Make Current** button, go back to the update set record and click the **Make This My Current Set** link under the **Related Links** section.

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

3. Right-click on the **Category** field label and select **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**. Click the **green check** icon to save the change.



5. Verify the customization by navigating back to any **CHG** record. Click the **Category** field and note that **TCOM** replaced Telecom in the choice list.

6. Navigate to the **current update set** and set the **State** field to **Complete**. Click **Update**.

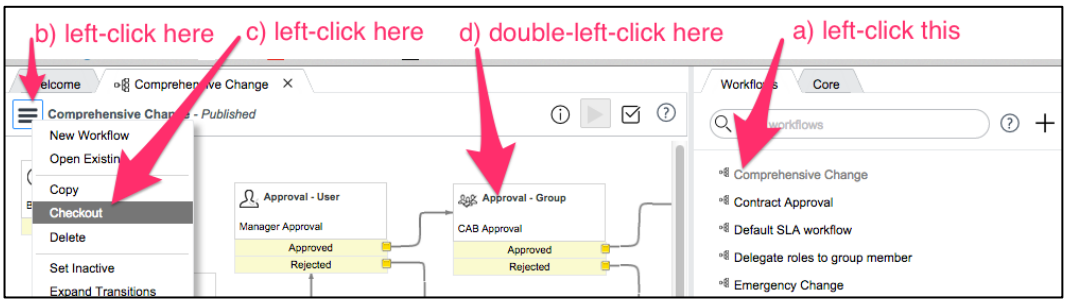
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Perform 'Change Workflow Update' Update Set Customizations (on Child)

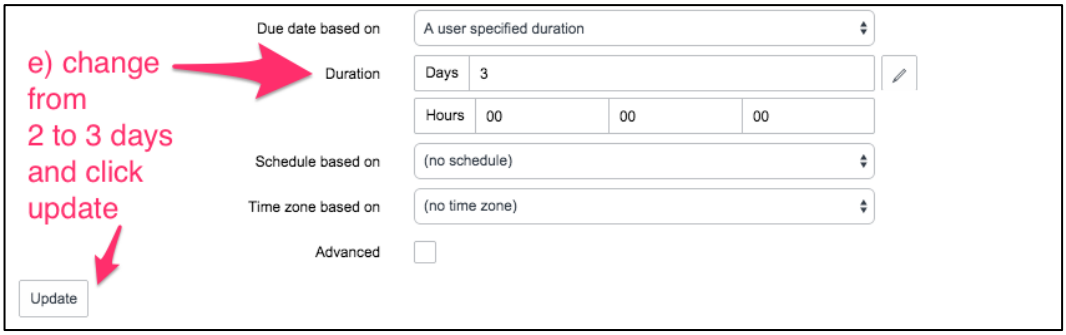
1. Create **Local Update Set** named **Change Workflow Update** and make it the **current update set** using **Submit and Make Current**.

   Note: If you forget to click the **Submit and Make Current** button, go back to the update set record and click the **Make This My Current Set** link under the **Related Links** section.

2. Navigate to **Workflow > Workflow Editor**
   a) Click **Comprehensive Change** listed under the **Workflows** tab on the right pane. This opens the **Comprehensive Change** workflow on the left pane.
   b) Click the **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. Click **Update**.



3. Click the **hamburger icon** (**step b** above) and select **Publish**.
4. Close the tab and go back to the main tab/window you were working in before switching to the **Workflow Editor**.
5. Navigate to the **current update set** and set the **State** field to **Complete.** Click **Update**.

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Lab Success Verification

You know how to create and switch between update sets to capture changes in a specific update set.

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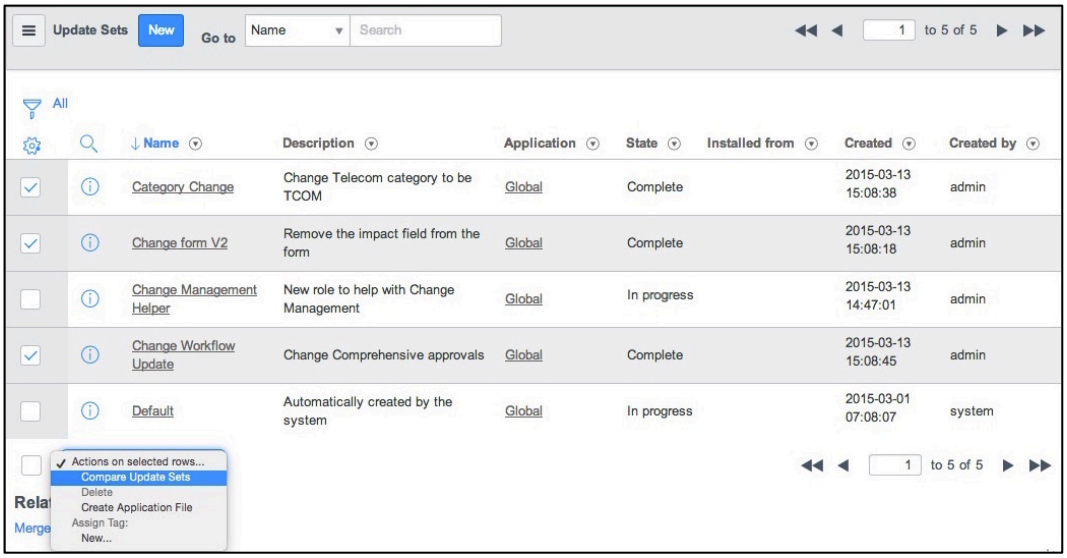
Lab Goal

ServiceNow provides features for understanding conflicts before you move the update set and correct them. This lab assesses conflicts and explains how to merge the three Update Sets from the last lab into one Update Set.

Lab 2.0 Prepare Update Set to Move

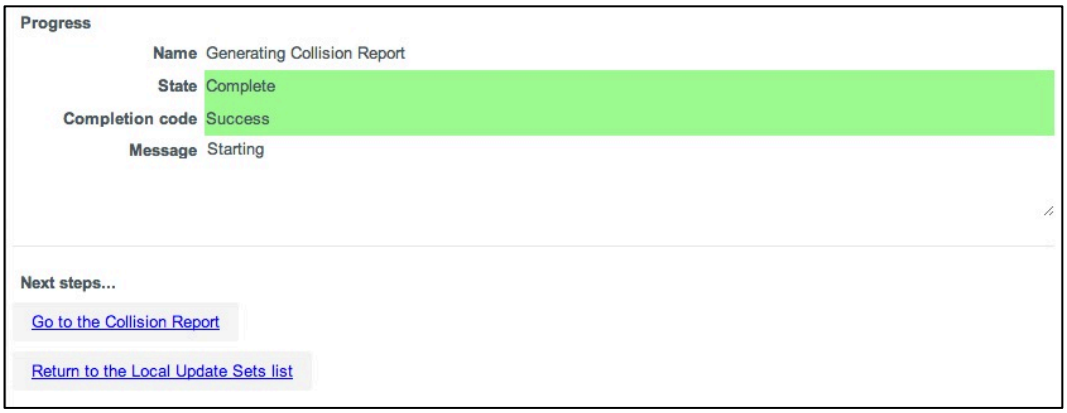
Create Collision Report

1. Navigate to **System Update Sets** > **Local Update Sets**.
2. Click the **check boxes** next to the three update sets created in the final portion of the last 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.

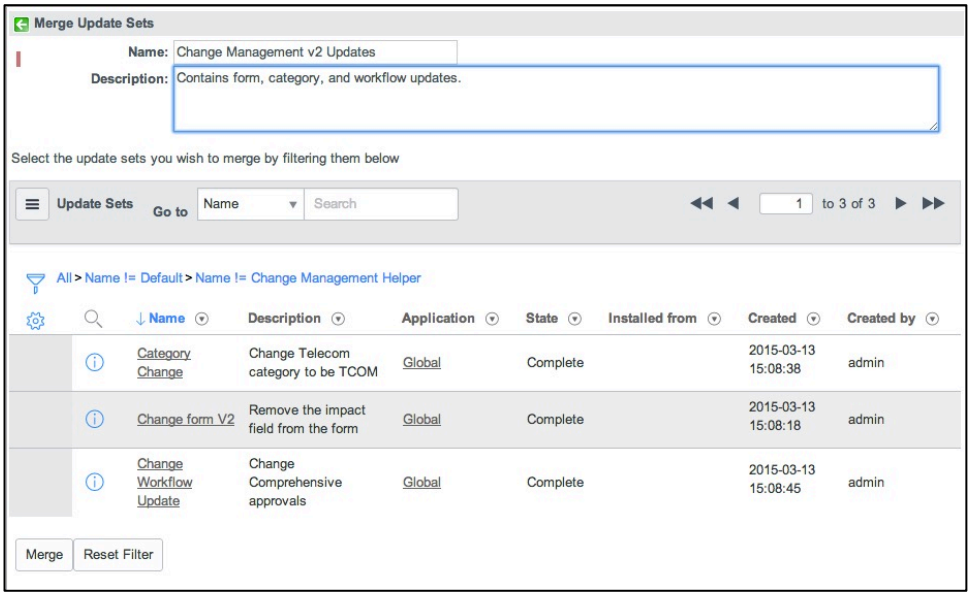


Merge Update Sets

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**.



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

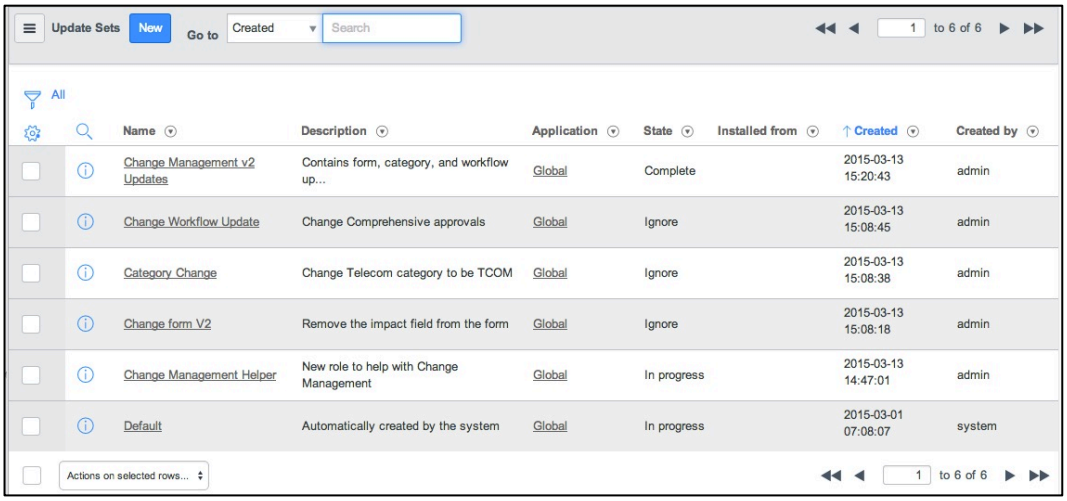
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5. Navigate to the new **Change Management V2 Updates** update set. Mark the update set as **Complete.** Click **Update**.

Lab Success Verification

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

2. You should see the 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 and understand a collision report.

You know how to merge update sets.

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Lab Goal

This lab explains how to use an Update Set with customizations complete to promote the Update Set to another instance.

Lab 3.0
Promote Update Set

Create Update Source (Parent Instance)

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

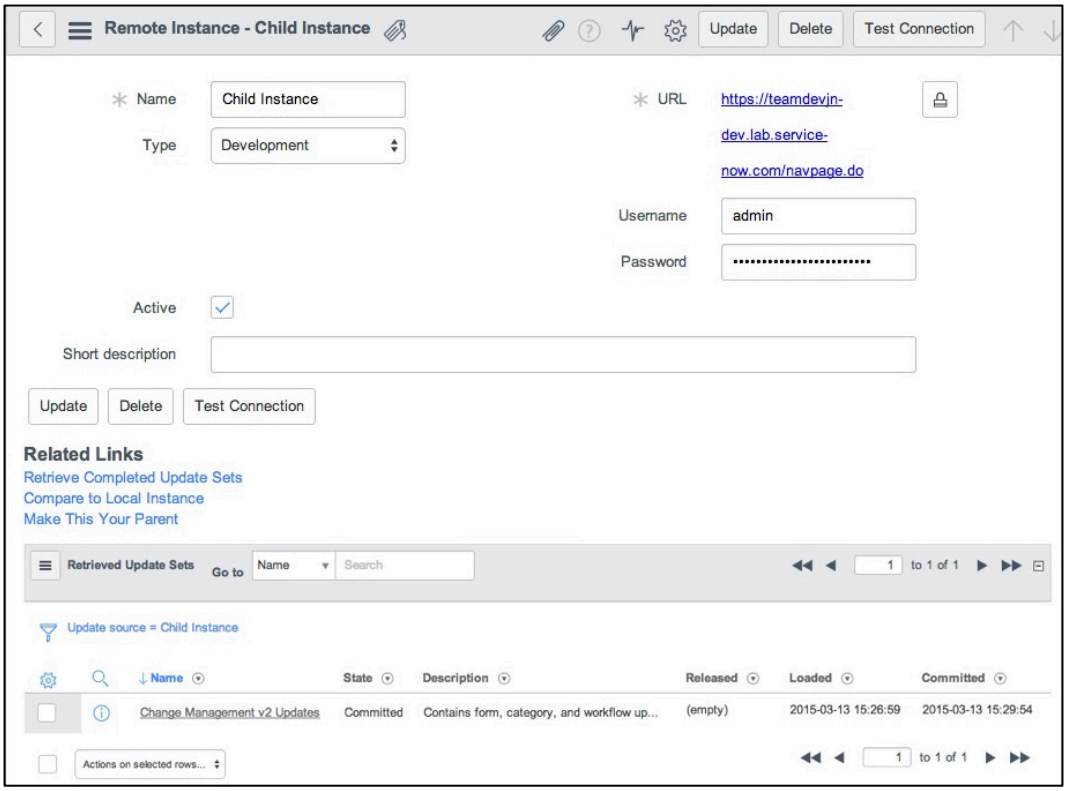


4. Click **Test Connection** to ensure the entered credentials are correct.
5. Click **Submit**.

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Retrieve Update Sets

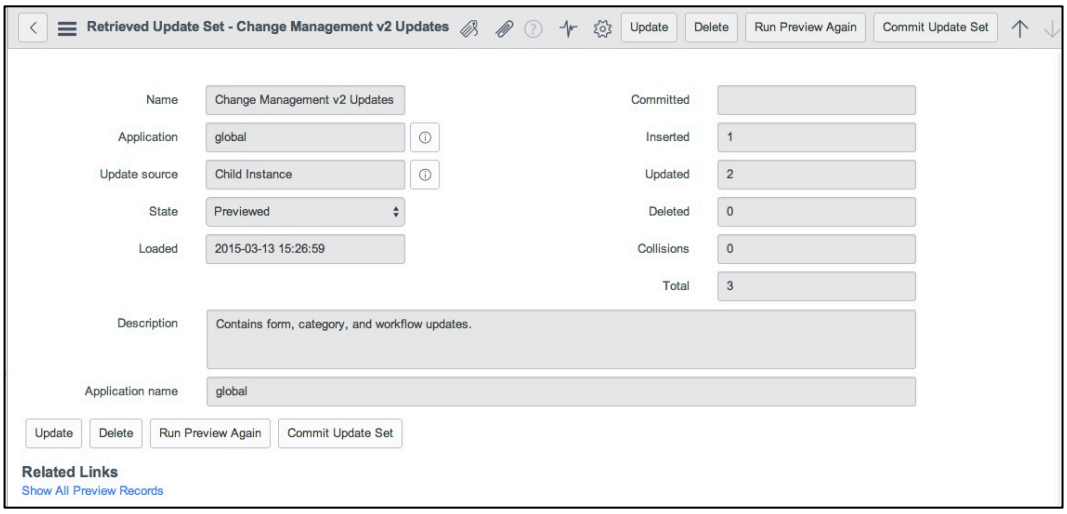
1. Navigate to **System Update Sets** > **Update Sources > Your Data Source**.
2. Click **Retrieve Completed Update Sets**.
3. Once complete, open the **Change Management V2 Updates** update set.



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 to retrieve update sets.

You know how to Retrieve, Preview, and Commit an update set.

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Lab Goal

You now have an Update Set with customizations committed successfully on another instance. This lab explains how to solve the problem of configuration accidentally not being captured in an update set.

Lab 4.0 Missing Updates

Complete Update Set (Child)

1. Navigate to System **Update Set > Local Update Sets > Change Management Helper** in the **child** instance.
2. Change the **State** field to **Closed**. Click **Update**.

Retrieve Update Sets (Parent)

1. Navigate to **System Update Sets** > **Update Sources > Your Data Source** in the parent instance.
2. Click **Retrieve Completed Update Sets**.
3. Once complete, open the **Change Management Helper** update set.
4. Click **Preview** (but **do not** commit the update set after the Preview).
5. Review the **Change Management Helper** update set. Observe that there is an update for the 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?

Locate and Correct Missing Update (Child)

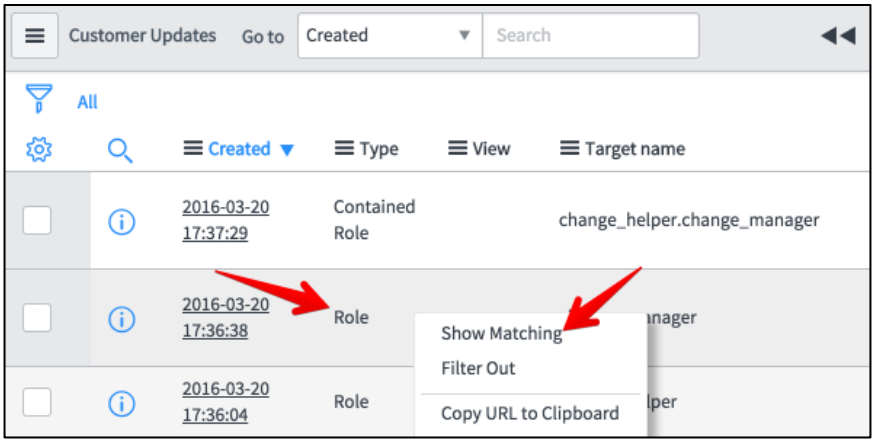
1. In the left navigator, enter **sys_update_xml.list** and hit the ENTER key.



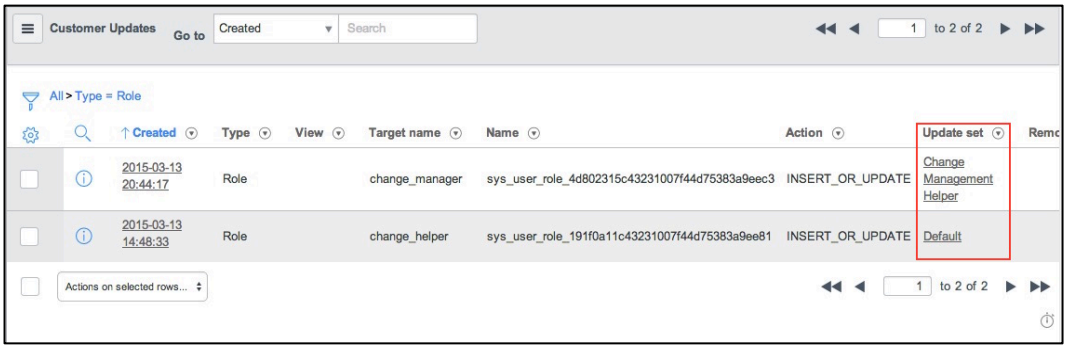
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2. Sort the list of update Customer Update records by the **Created** date to see the newest changes at the top of the list.

3. Right-click the word **Role** under the **Type** column and then click **Show Matching** to show only role changes.



4. Observe that the **change_helper** role is in the **Default** Update set since you created it before selecting a current update set. Fix this to add it to the **Change Management Helper** update set.



5. Open the Customer Update record for the **change_helper** role by clicking on the record's **Created date** or the **information** icon .

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

Retrieve Update Set Again (Parent)

1. Navigate to **System Update Sets** > **Update Sources > Your Data Source** in the parent instance.

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2. Click into the **Change Manage Helper** retrieved update set, verify that it is in the **Previewed** state, and click **Delete**. A Confirmation dialog opens requesting confirmation to remove the items from the retrieved update set. Click **Delete**.

3. Click **Retrieve Completed Update Sets**.

4. Once complete, open the **Change Management Helper** update set.

5. Click the **Preview** button. Observe that there are now two entries of type **role**. One for **change_manager** and one for **change_helper**. Click **Commit Update Set** to apply the new changes.

Lab Success Verification

You know how to locate updates made.

You know how to correct changes that were mistakenly not captured in the right update set.

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Lab Goal

Lab 5.0 Update Set Collision Detection

For instance stacks that do not use Team Development (which is common and not covered in this lab), best practice dictates that customizations always be made from the bottom of the stack (development instance) and moved upward (test/QA instance and then production instance). This lab illustrates what occurs for two scenarios when this best practice is not followed.

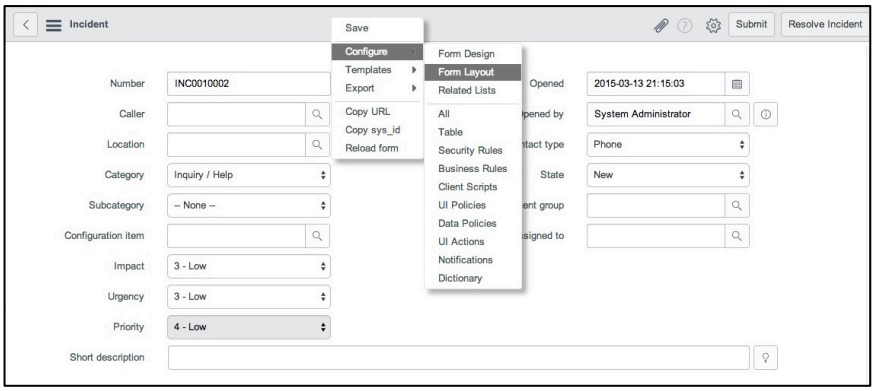
In the first scenario, a customization is made on the child then on the parent. For the second scenario, the time-order of the customizations is reversed: first parent, then child. Retrieving the update set associated with the first scenario generates a preview error. The second does not, resulting in the parent customization being overwritten by that of the child. Since we cannot guarantee that all parent changes are made after those of a child, the best practice ensures that all customizations are preserved.

Modify Incident Form Layout (Child)

1. Create a new **Update Set** on the **child** instance with a **Name** of **Collision Update Set** and make it the current update set.

2. Navigate to **Incident** > **Create New** to open the incident form.

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



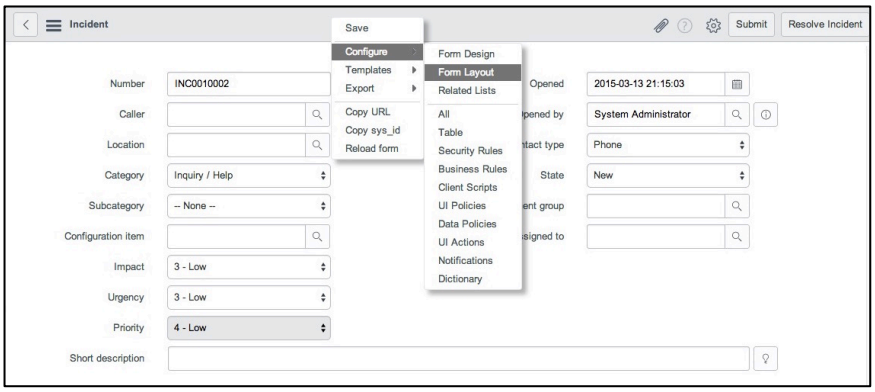
4. Remove any field you want eliminated from the form and click **Save**.

5. Mark the update set as **Complete**.

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Modify Incident Form Layout on Parent Instance (Parent)

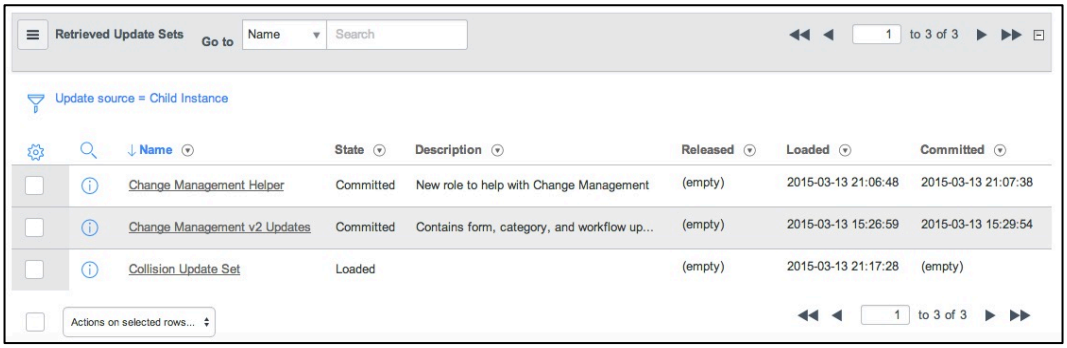
1. On the **parent** instance, navigate to **Incident** > **Create New** to open the incident form.
2. Right-click on header and choose **Configure** > **Form Layout**.



3. **Remove** any field off the form and click **Save**.

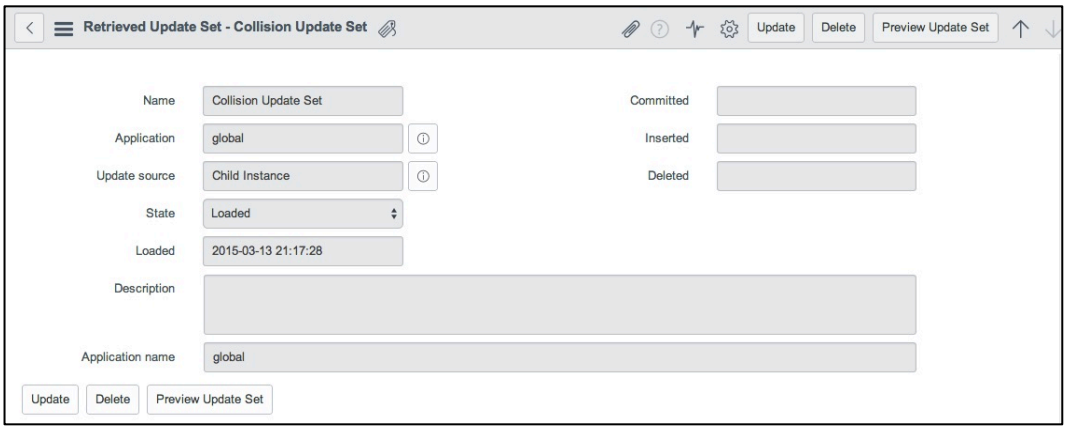
Retrieve Update Sets (Parent)

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

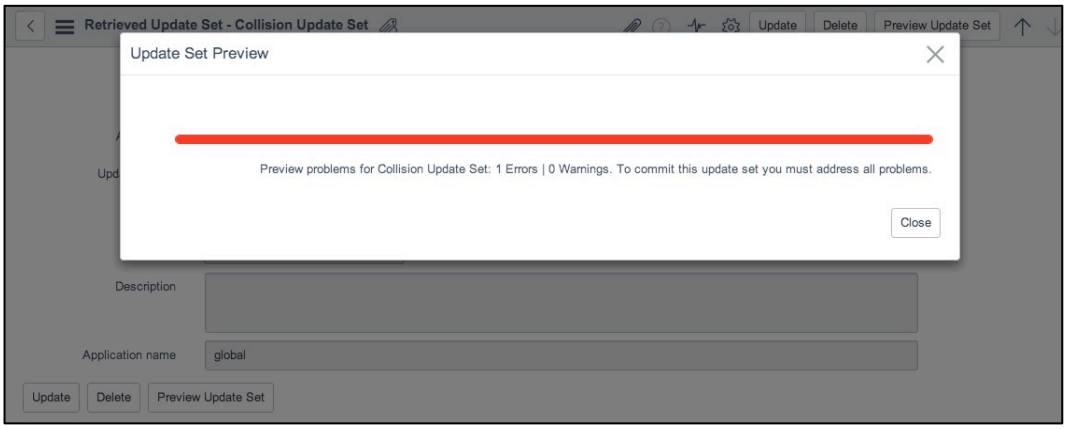


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4. Open the retrieved update set for **Collision Update Set**.

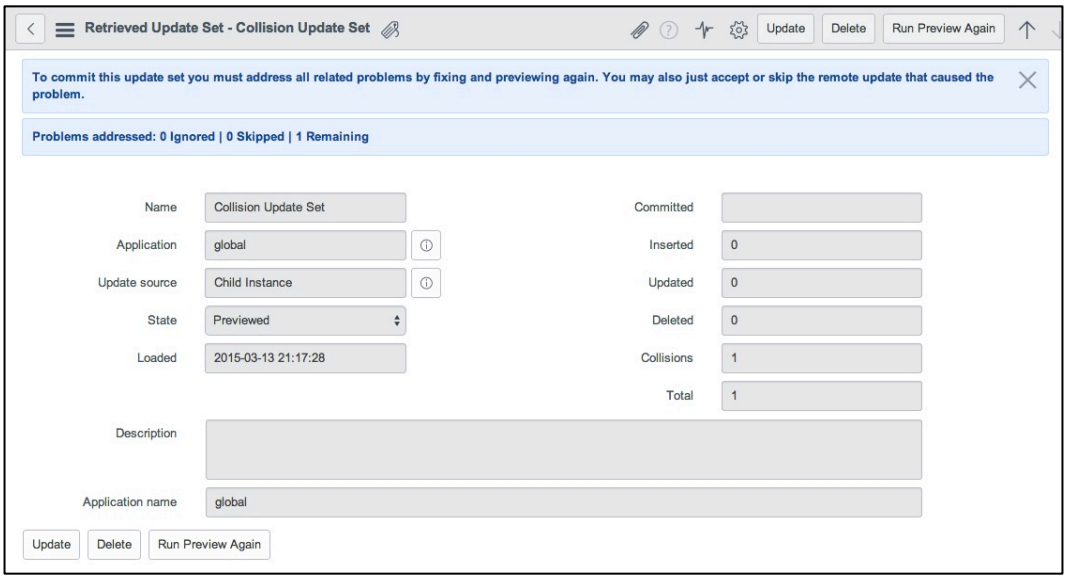


5. Click **Preview Update Set**.



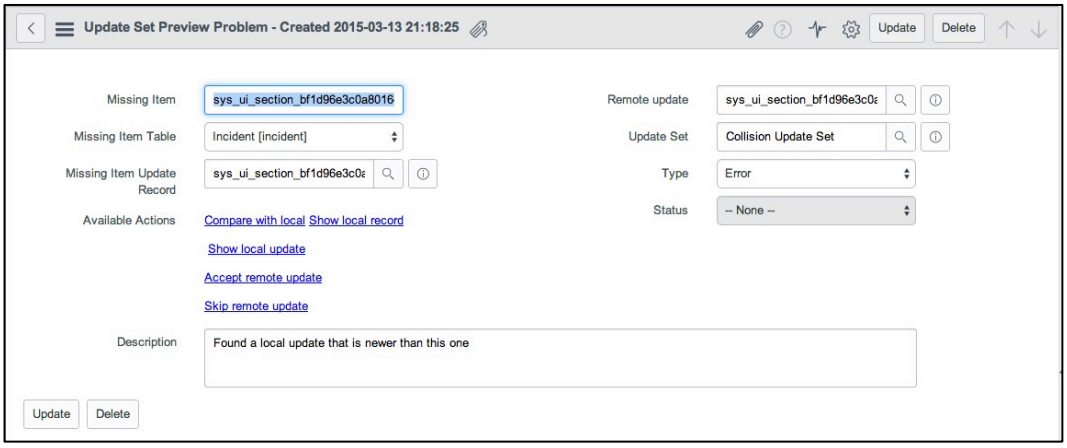
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6. Click **Show Preview Problems**.



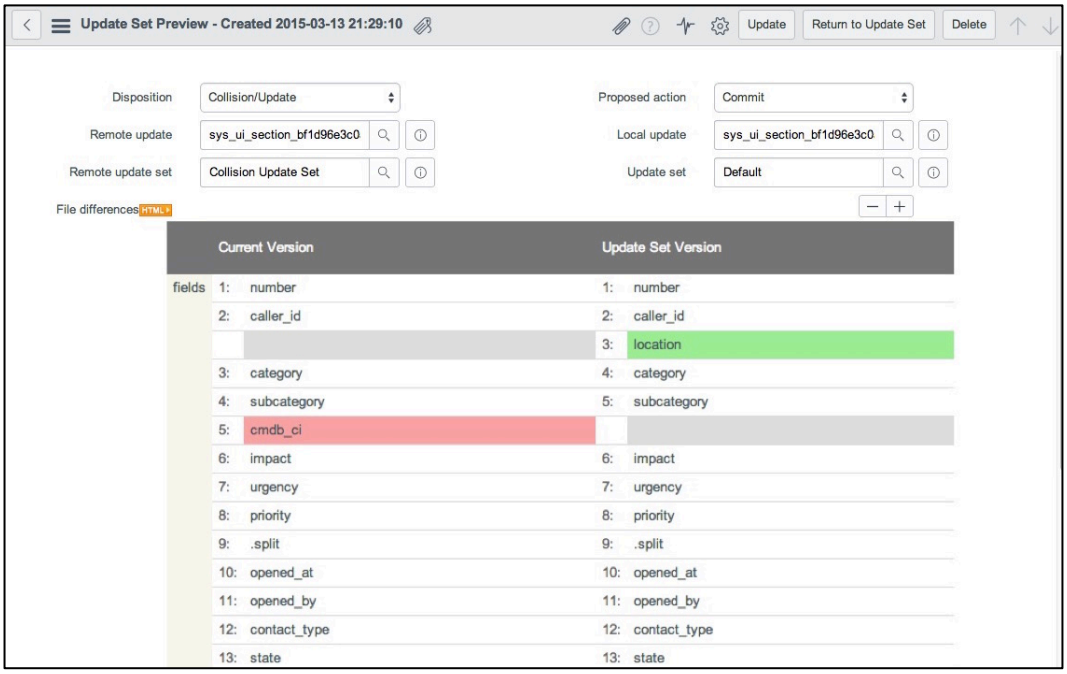
7. Find the **Update Set Preview Problems** related list and **open** the record.

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



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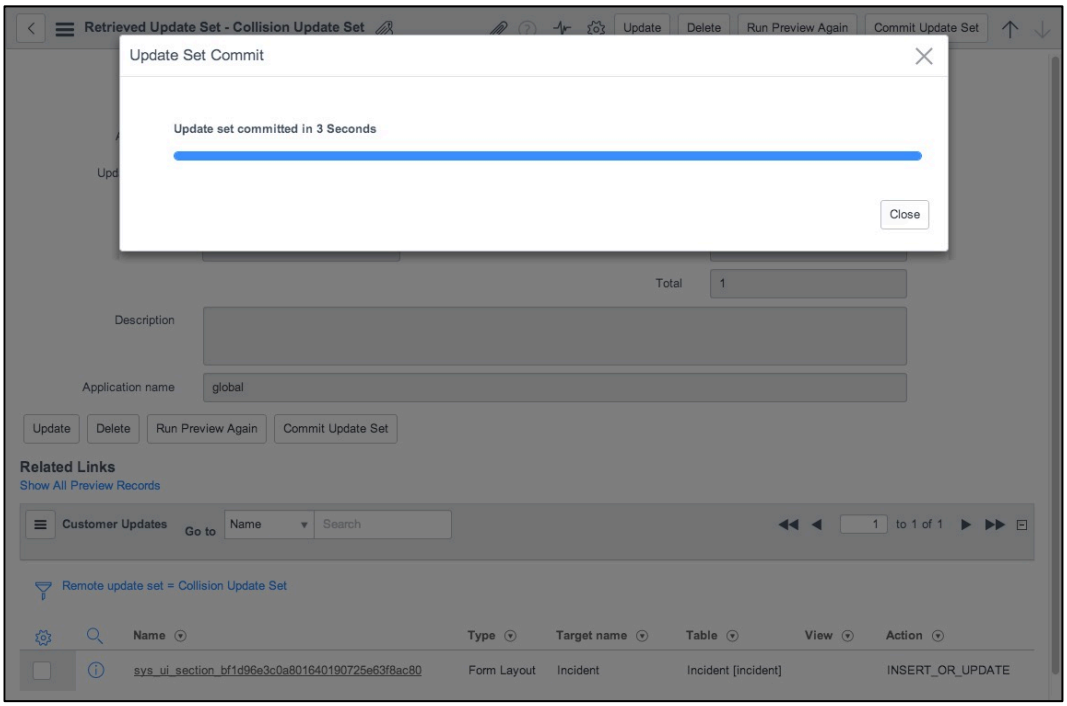
9. Either choose **Accept remote update** OR **Skip remote update** (either is fine) from the **Available Actions** choices in the **Update Problems** related list.



10. Navigate to **System Update Sets** > **Retrieved Update Sets** > **Collision 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 **every** customization on the development instance and then moving it up-stack.

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