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Lab Guide

Update Sets: Best Practices to Move Code Smoothly

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Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

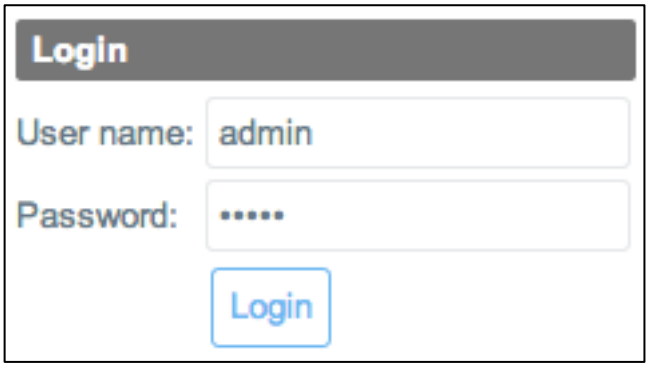
Lab Goal

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

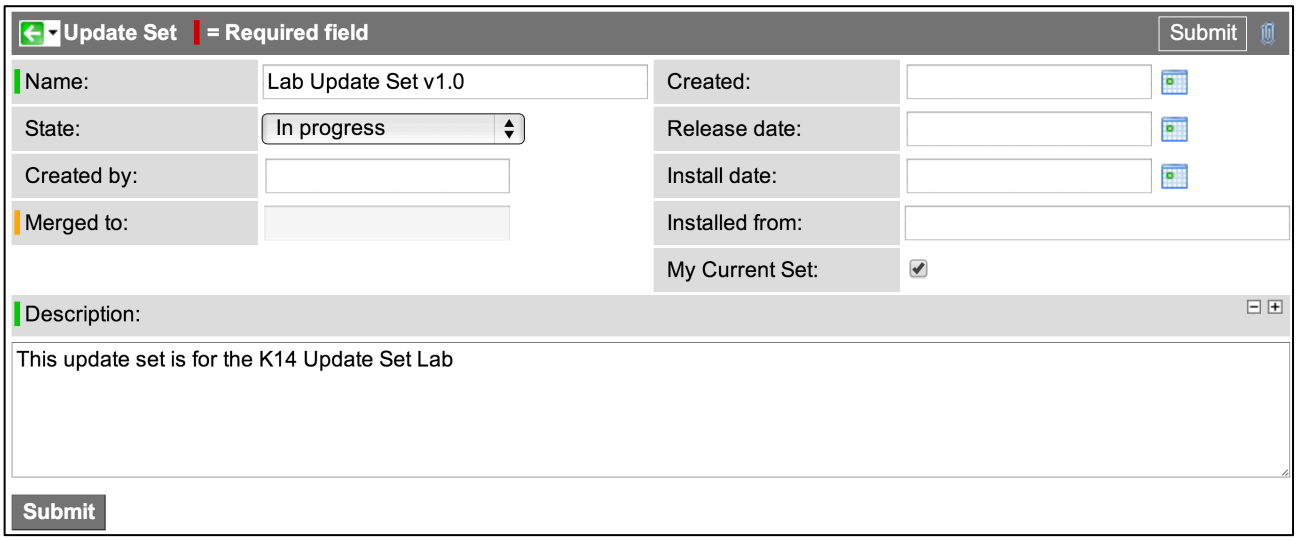
1. Your instance URL is on the cover page.
2. Login using the **admin** credentials provided on the cover.



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Create Update Set

1. Navigate to **System Update Sets > Local Update Sets.**
2. Click the **New** button.
3. Give the update set a name, description and check “My Current Set”.



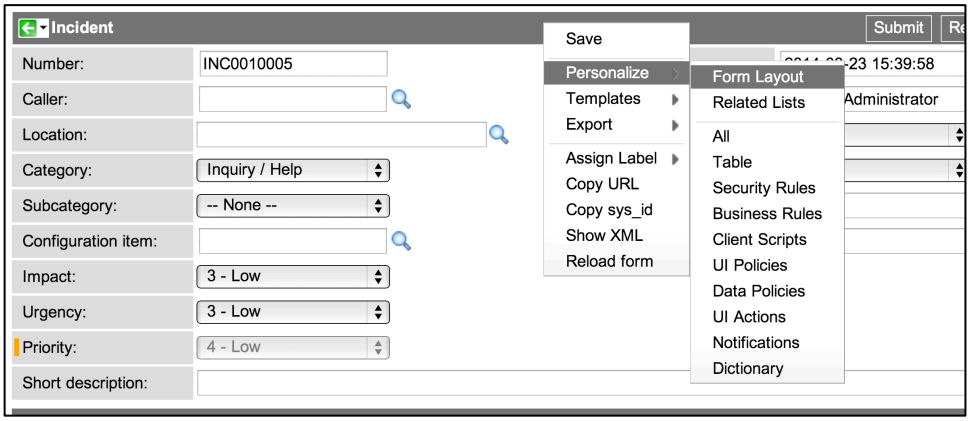
4. Click **Submit**.

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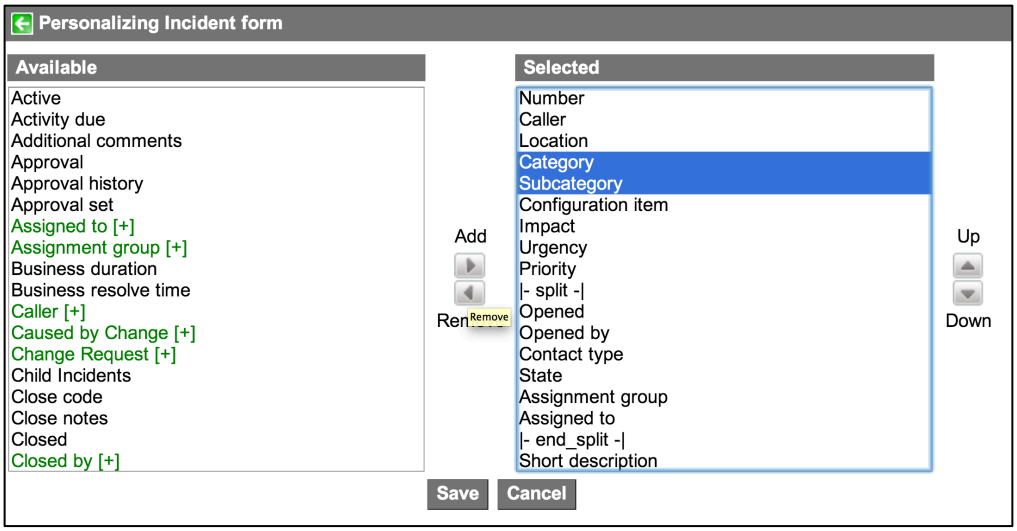
Configure Incident Form

1. Navigate to **Incident > Create New.**

2. Right click on header and choose **Personalize** > **Form Layout.**

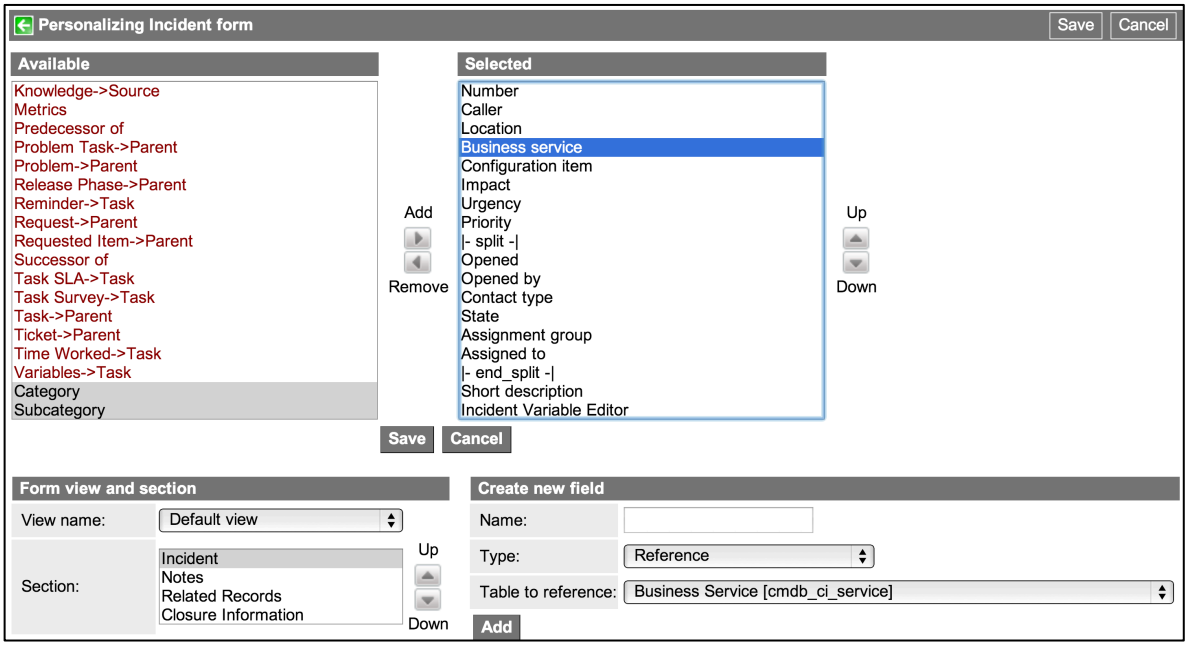


3. Remove the **Category** and **Subcategory** fields.



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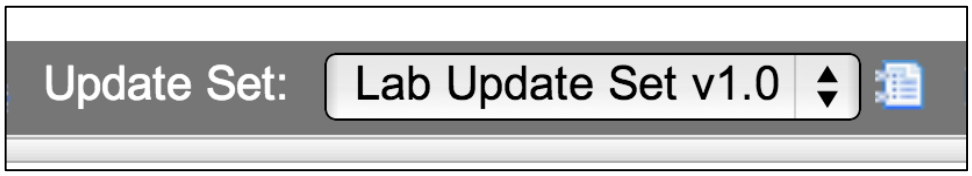
4. Create a new reference field called **Business service** referencing the Business Service table.



5. Click **Save** to save the changes.

Complete Update Set

1. Navigate to update set; you can either access the update set record by the application navigator or by clicking the icon next to the update set picker in the header.



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

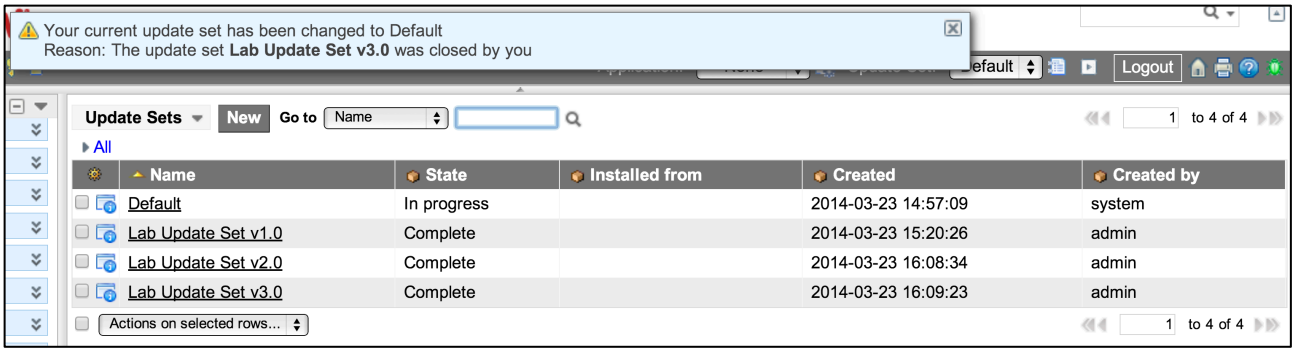
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Create Two Additional Update Sets

1. Following the steps above, create two more update sets.
2. The first update set should add another new field on the Incident form.
3. The second update set should add a third field on the Incident form.
4. Mark both update sets as **Complete**.

Lab Success Verification

1. Navigate to **System Update Sets > Local Update Sets.**
2. You should see your update sets listed with a state of Complete.



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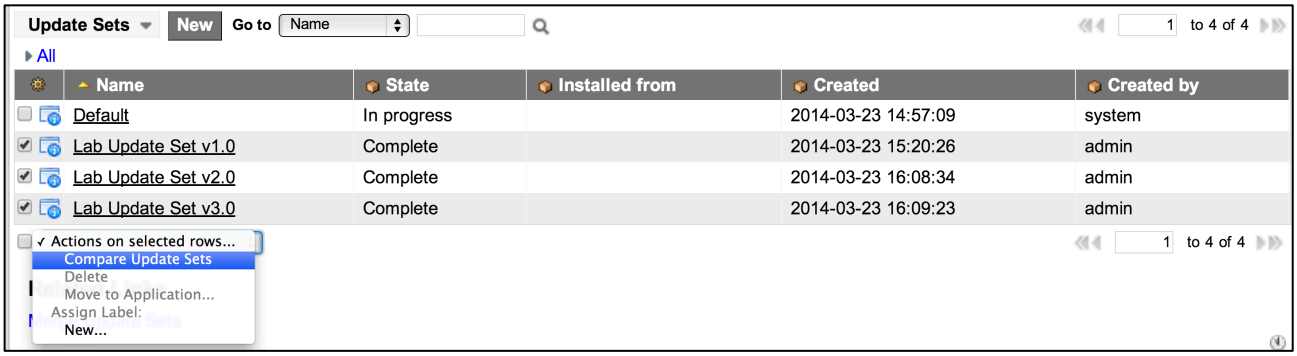
Lab Goal

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

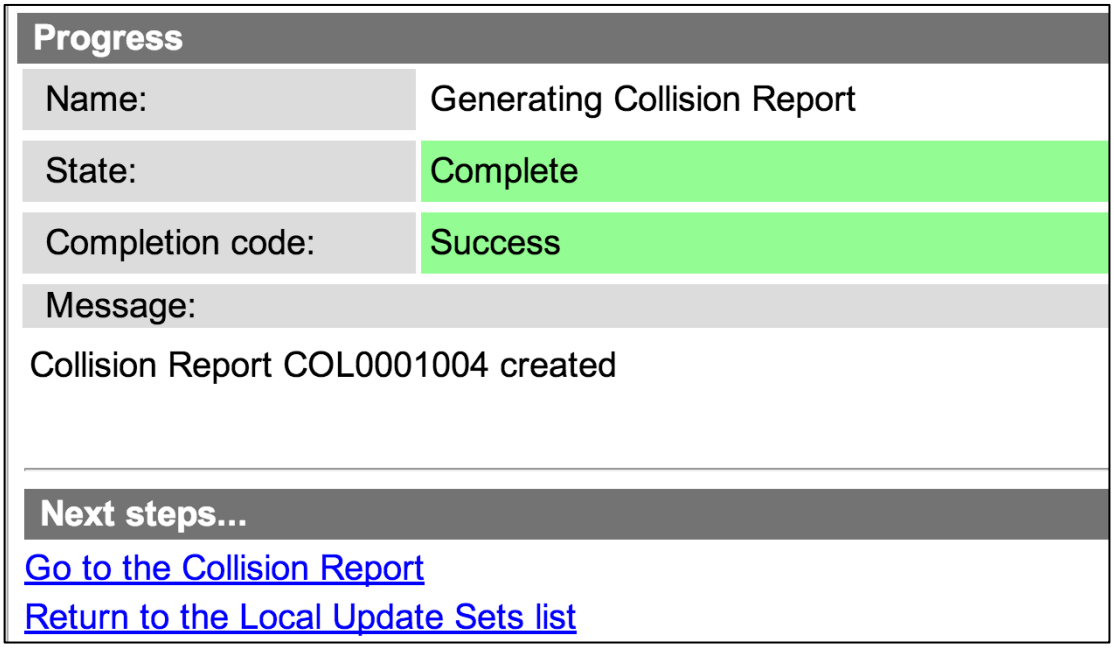
Create Collision Report

1. Navigate to **System Update Sets** > **Local Update Sets**.
2. Click the checkbox next to the 3 update sets you have created.
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.

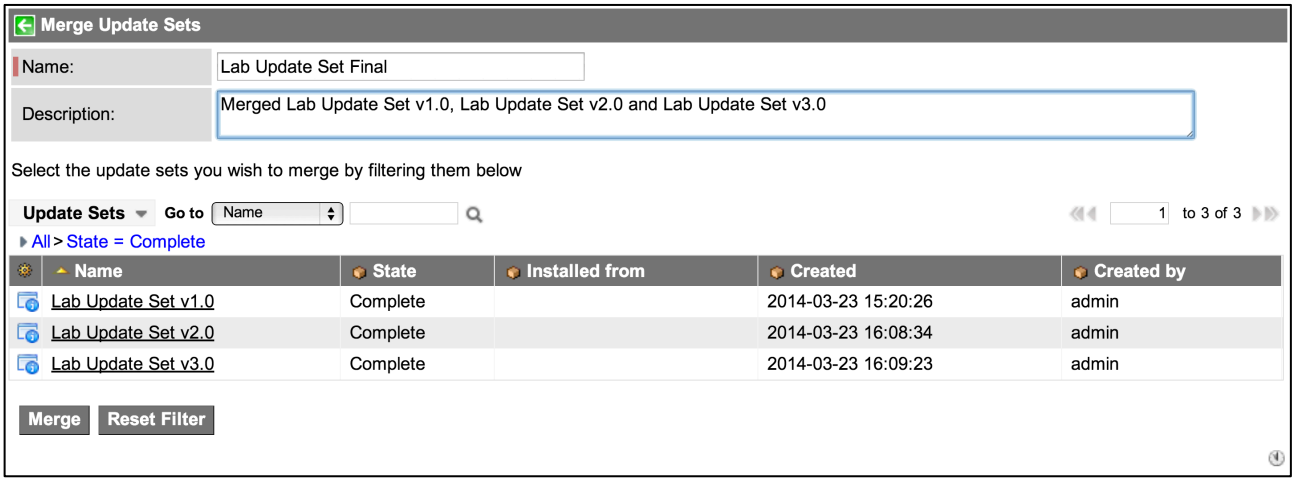


Merge Update Sets

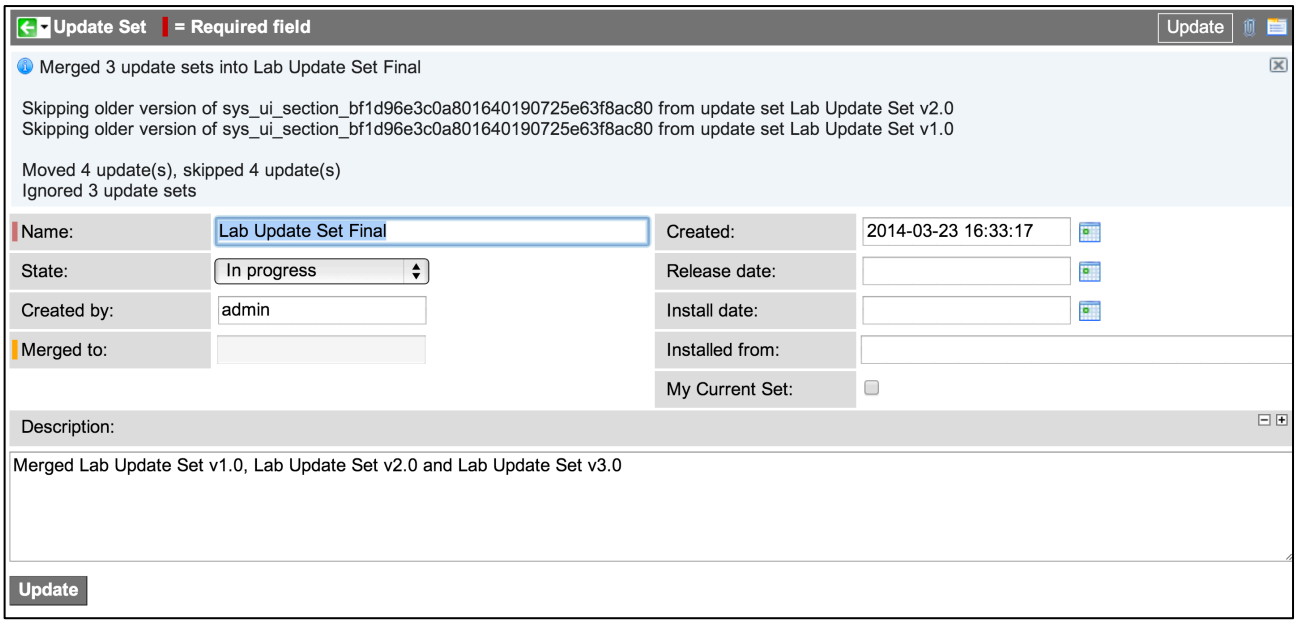
1. Navigate to **System Update Sets** > **Merge Complete Sets**.
2. Make sure that the 3 update sets are listed in the related list. If not, filter the list so only the 3 update sets you created are shown.

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3. Enter a meaningful name and description.



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



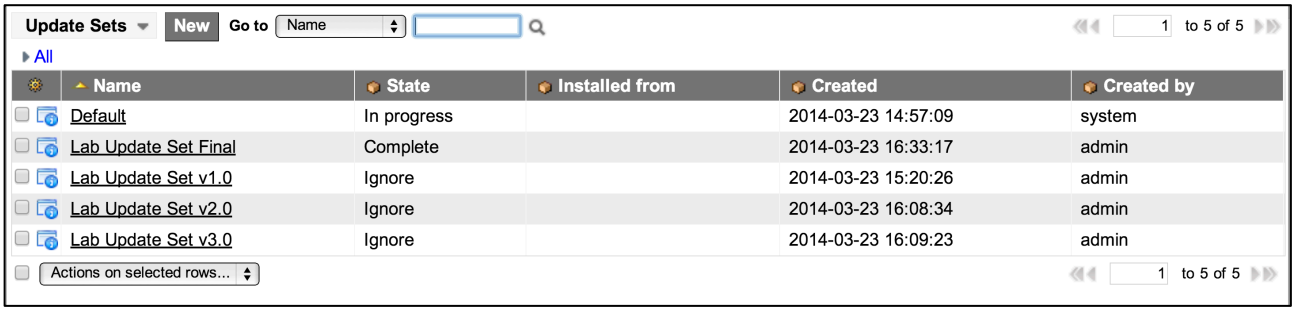
5. Mark the update set as **Complete.** Click **Update**.

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Lab Success Verification

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

2. You should see your 3 update sets from the first lab in a state of Ignore and the newly created merged update set in a state of Complete.



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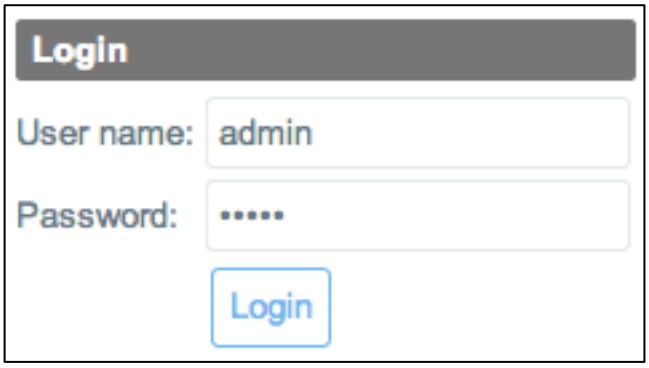
Lab Goal

Now that we have an Update Set without configurations complete, we are going to promote this Update Set to another instance.

Lab 3
Promote Update Set

Log on to Your Second Training Instance

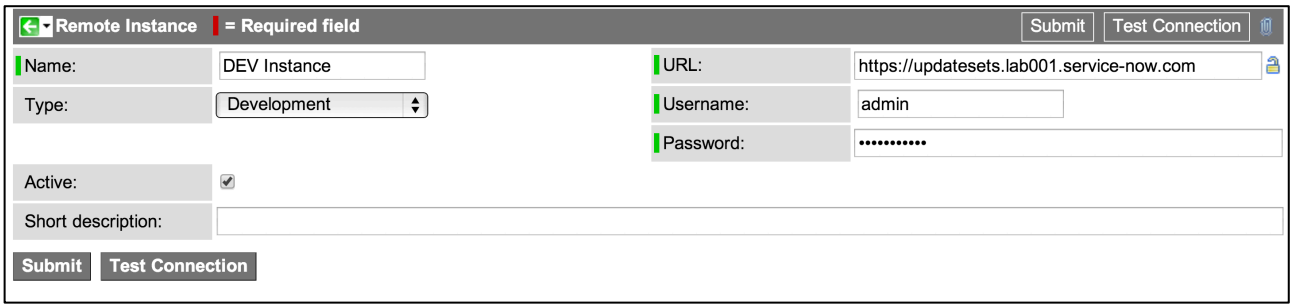
1. The instructor provides you with an instance URL.
2. Log into your instance, using the username **Admin** and the password **Knowledge14**.



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Create Update Source

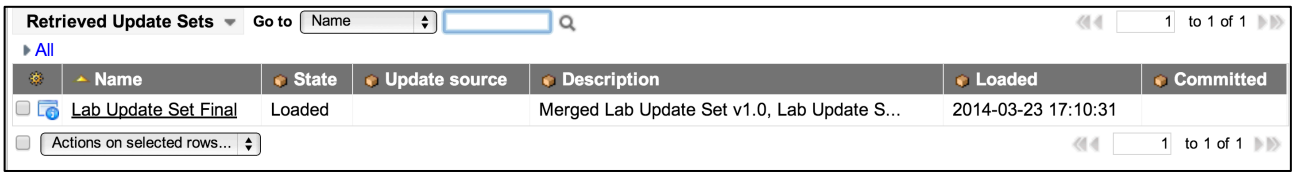
1. Navigate to **System Update Sets** > **Update Sources.**
2. Click **New**.
3. Enter a Name, the URL for your other lab instance, the Username and Password.



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

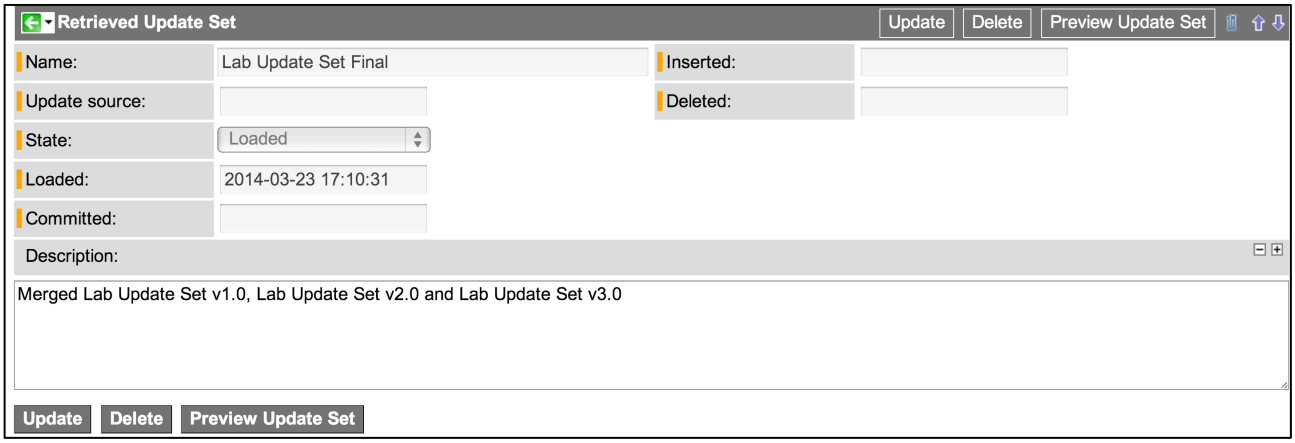
Retrieve Update Sets

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



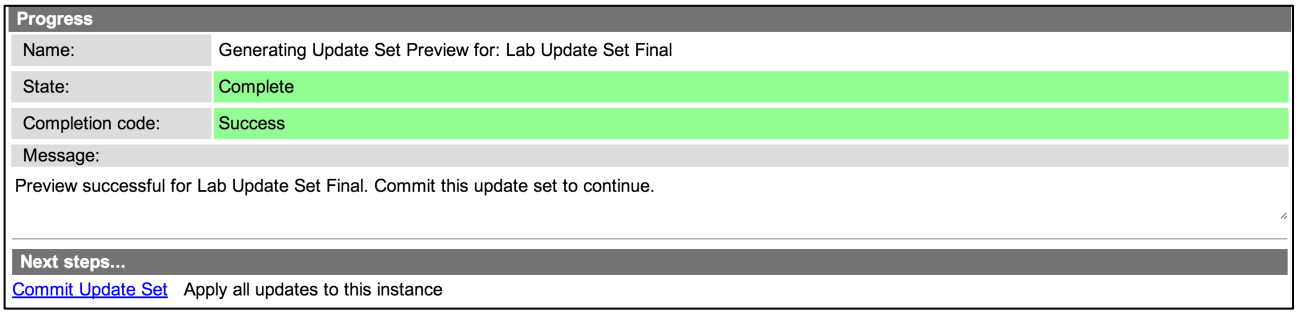
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4. Open retrieved update set



5. Click **Preview Update Set**.

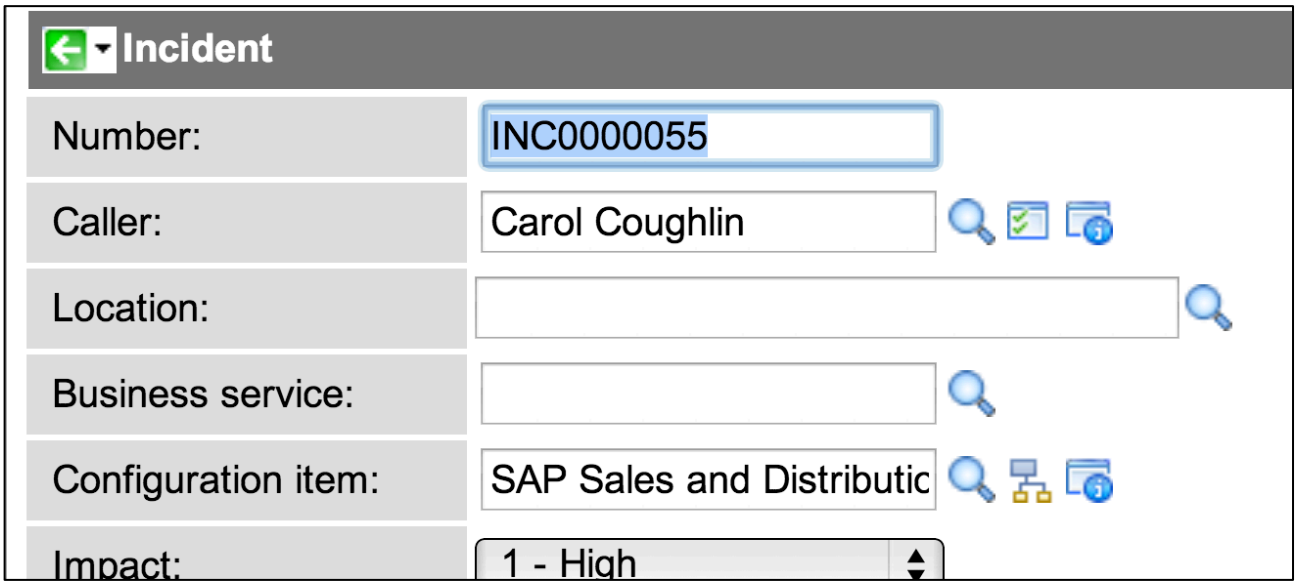
6. Click **Commit Update Set**.



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Lab Success Verification

1. Navigate to **Incident** > **Create New**.
2. You should see your form/field changes.



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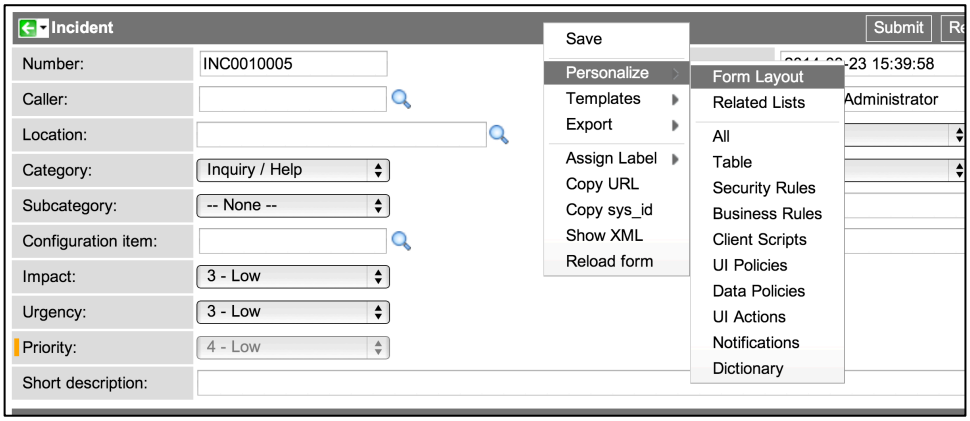
Lab Goal

When using Update Sets, it is possible you will encounter a collision. This lab will show you how to assess and handle collisions.

Lab 4
Update Set Collision

Modify Incident Form Layout

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

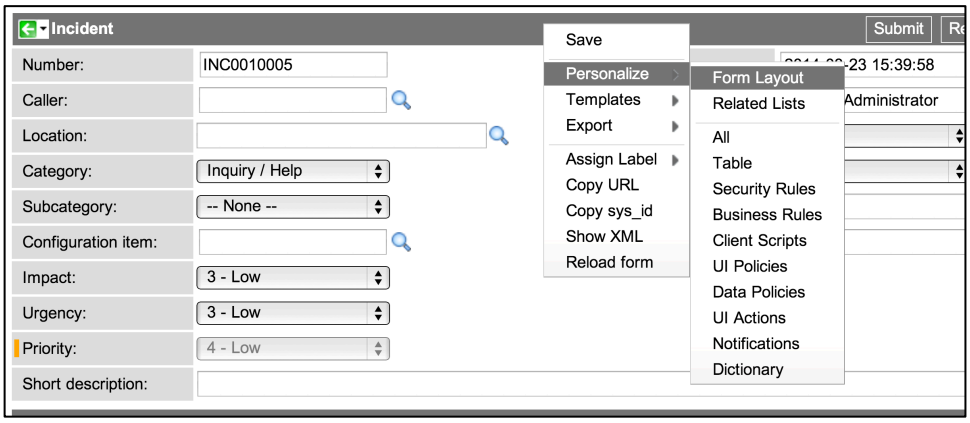


4. Remove any field from the form.
5. Click **Save**.
6. Mark update set as complete.

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Modify Incident Form Layout on Secondary Instance

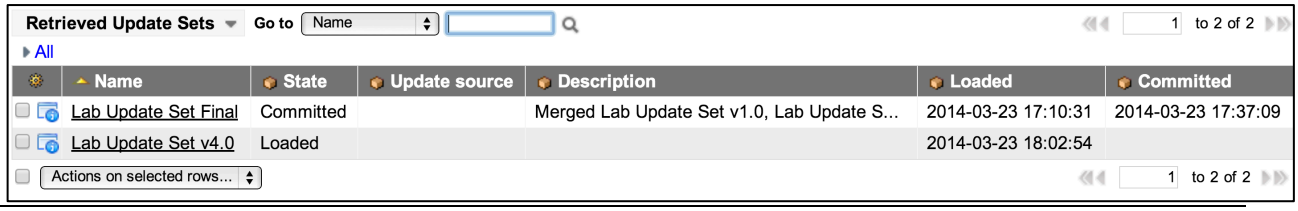
1. Navigate to **Incident** > **Create New.**
2. Right click on header and choose **Personalize** > **Form Layout.**



3. Remove any field from the form; just not the field you removed from the other instances.
4. Click **Save**.

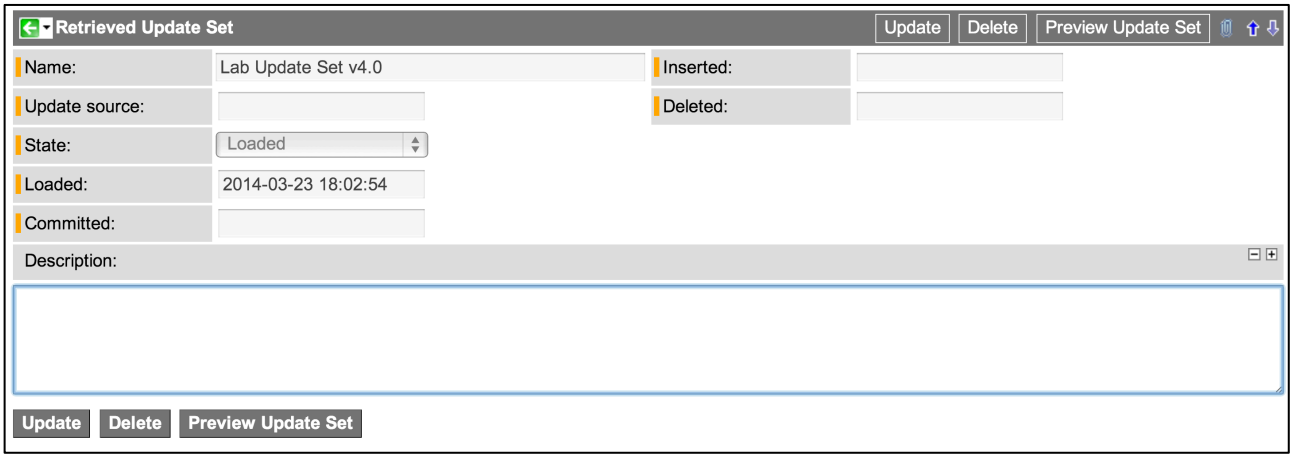
Retrieve Update Sets

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**.

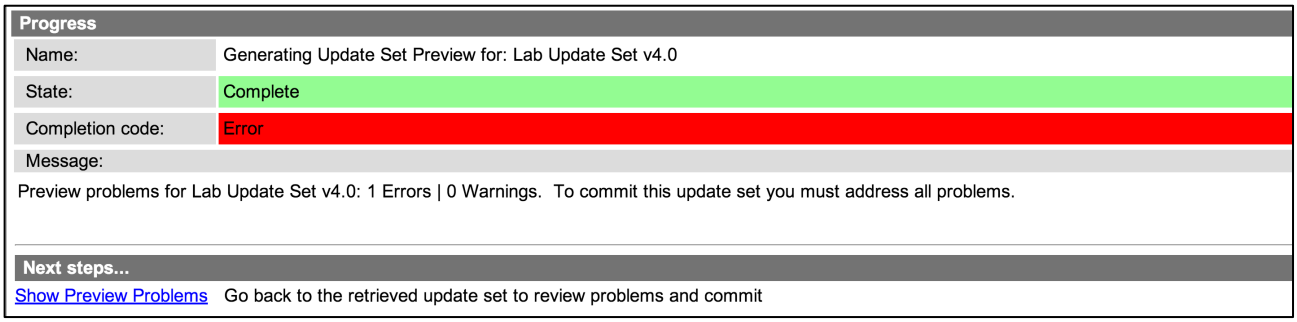


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4. Open retrieved update set.

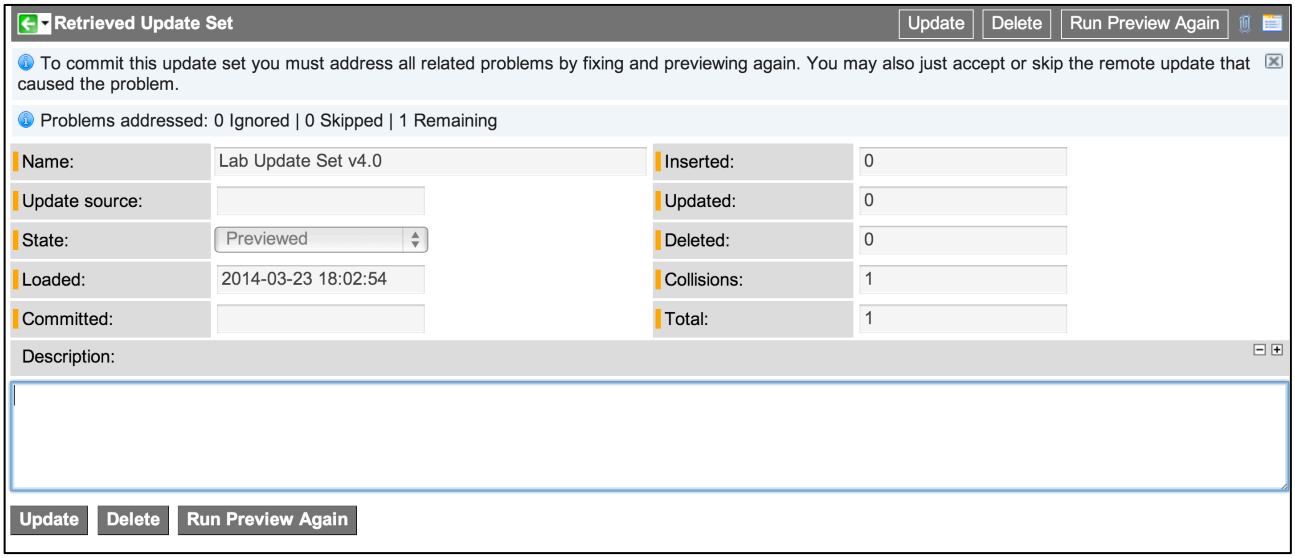


5. Click **Preview Update Set.**



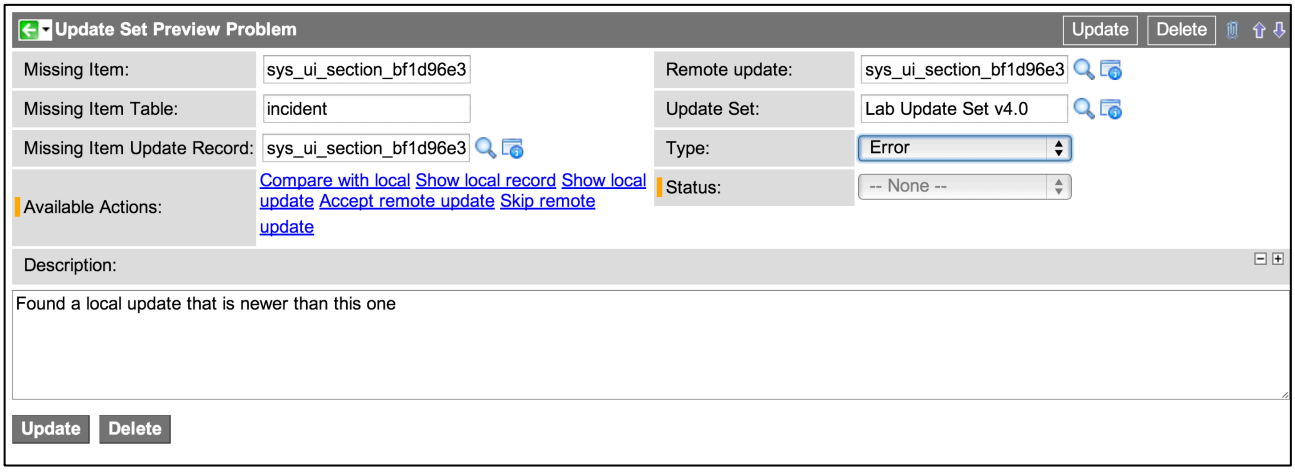
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6. Click **Show Preview Problems.**



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

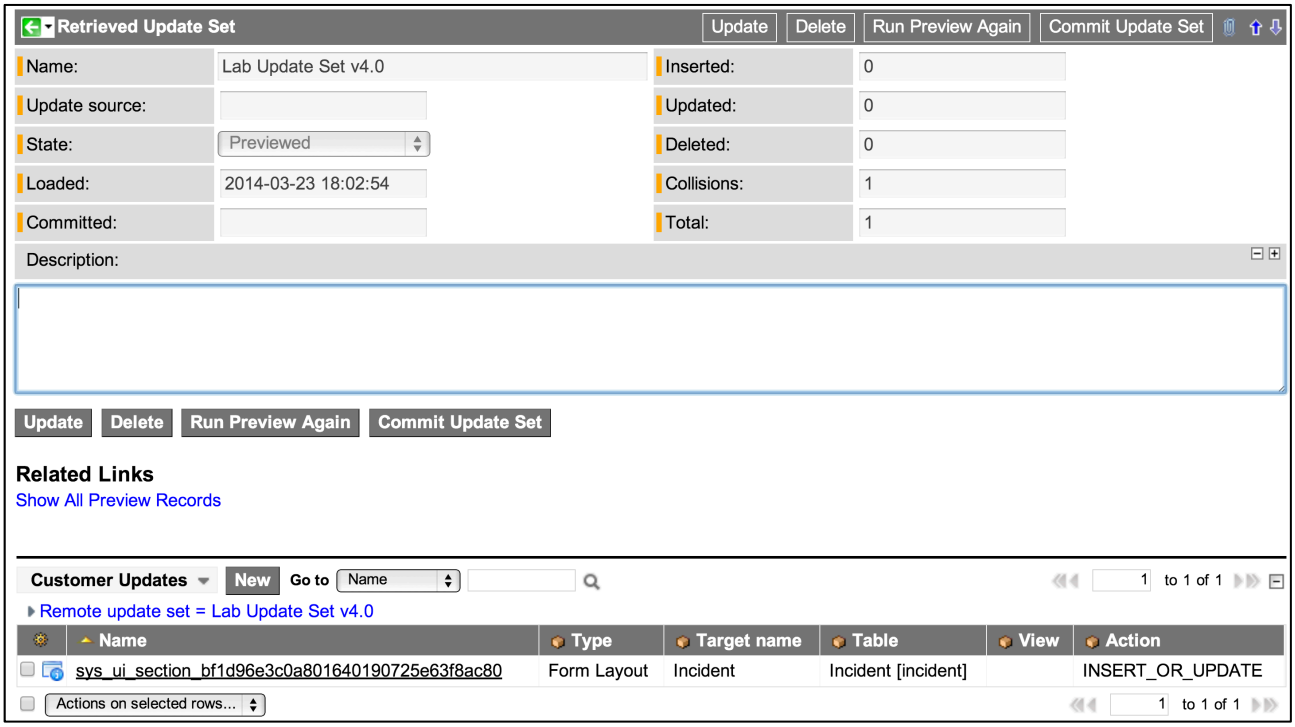
8. Either choose **Accept remote update** OR **Skip remote update** from the Available Actions choices.



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

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10. Click **Commit Update Set.**



Lab Success Verification

1. Navigate to **Incident** > **Create New**.
2. You should see your form/field changes according to what choice you made in the update set preview.

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