



UPDATE SETS IN SERVICENOW

INTRODUCTION TO UPDATE SETS

An Update Set in ServiceNow is a **group of customizations that can be moved from one instance to another**. It allows administrators to bundle changes like table modifications, field updates, form changes, script updates, and business rule modifications into a single set for easy migration.

Why Are They Important?

- Help migrate changes across different environments.
- Ensure consistency in development, testing, and production.
- Track and manage configurations efficiently.

PURPOSE OF UPDATE SETS

- Move Customizations Between Instances
 - Transfer changes from Development → Testing → Production safely.
- Track and Bundle Changes
 - Group related configuration items (CIs) like scripts, forms, workflows into one package.
- Enable Version Control
- Promote Reusability and Consistency
- Support Change Management
- Backup Before Deployment

HOW UPDATE SETS WORK

1. Select the Active Update Set

- Navigate to: System Update Sets > Local Update Sets
- Mark a set as Active to start capturing changes.

2. Make Configuration Changes

- Changes like creating Business Rules, modifying forms, adding fields, etc., are automatically recorded in the active update set.

3. Review Captured Updates

- Go to the update set and verify what records (update entries) have been captured.

4. Export the Update Set (XML)

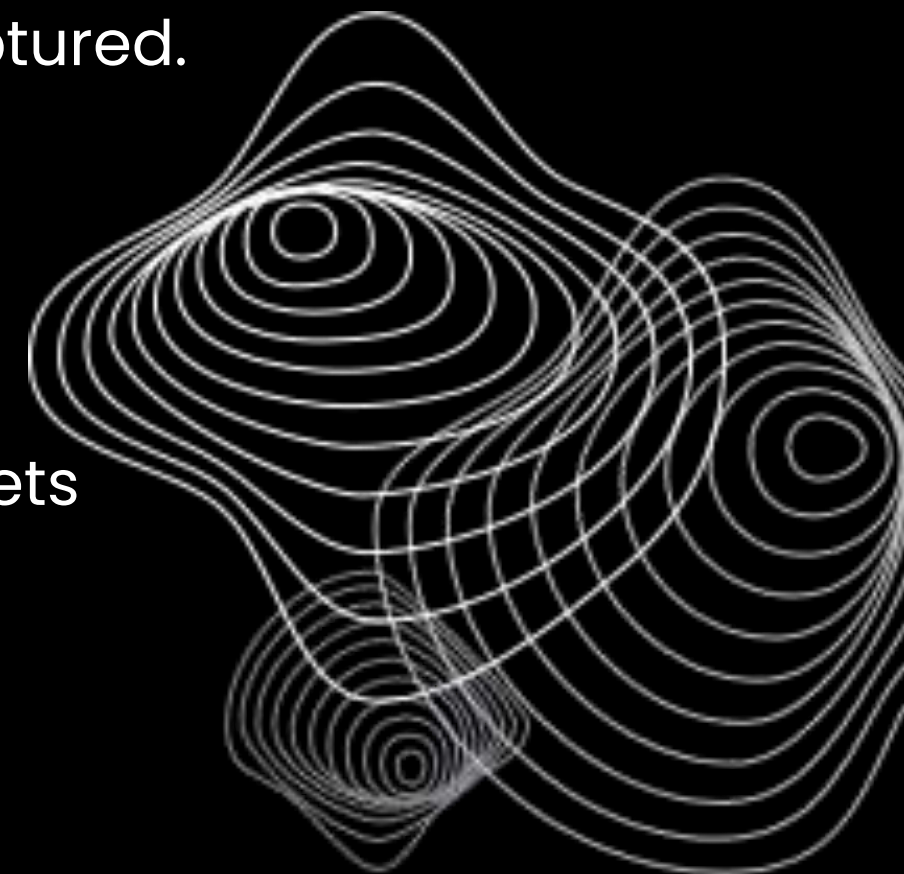
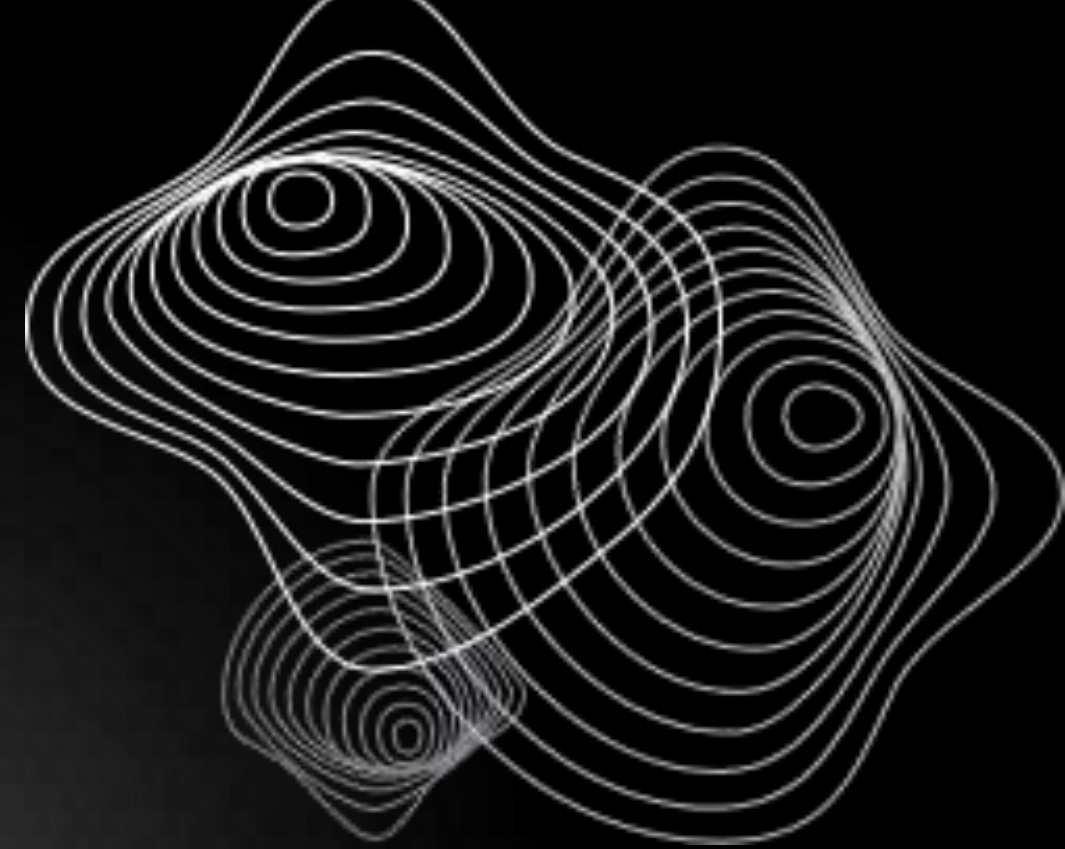
- Once ready, mark the update set as Complete.
- Export it to an XML file to move it to another instance.

5. Import to Target Instance

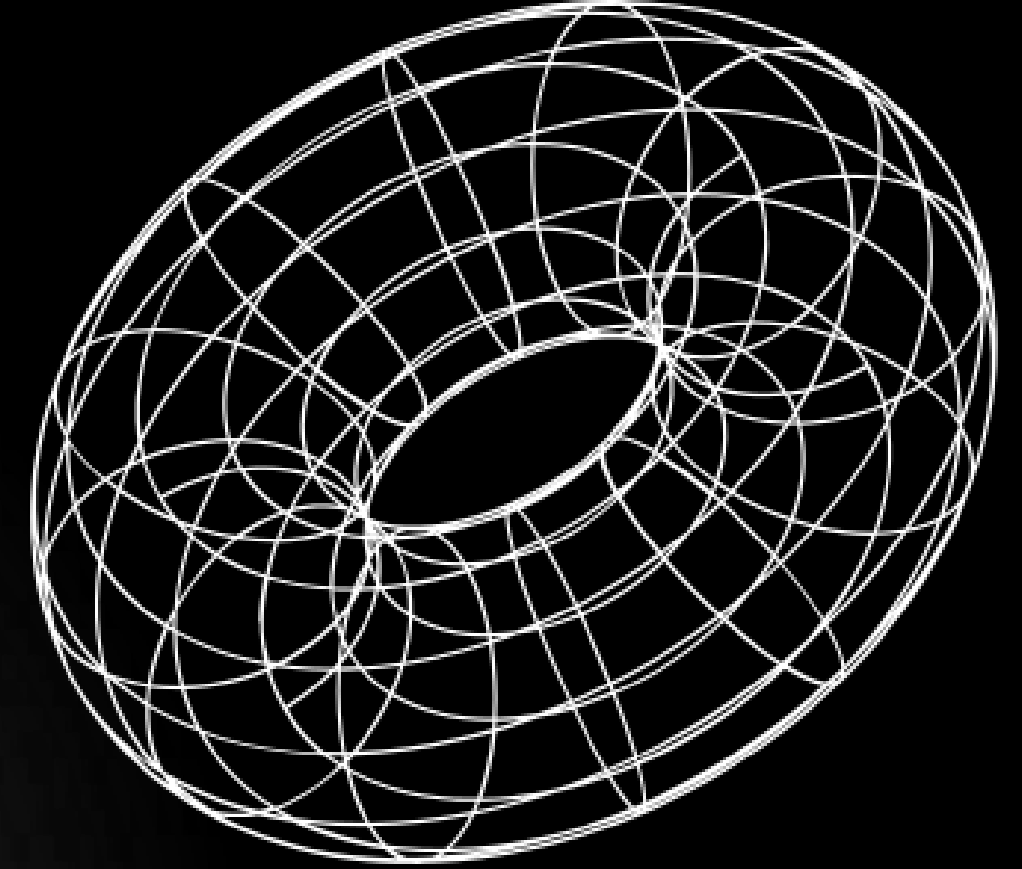
- On the target instance, navigate to System Update Sets > Retrieved Update Sets
- Import the XML file and Preview it first.

6. Commit the Update Set

- Apply the captured changes to the target instance by committing it.



KEY COMPONENTS OF UPDATE SETS



1. Update Set (Parent Record)

- A container that groups a set of configuration changes.
- Located in: System Update Sets > Local Update Sets

2. Update Entries (Child Records)

- Each configuration change (e.g., a new Business Rule or modified UI Policy) is saved as an Update Entry.

3. Customer Updates Table (sys_update_xml)

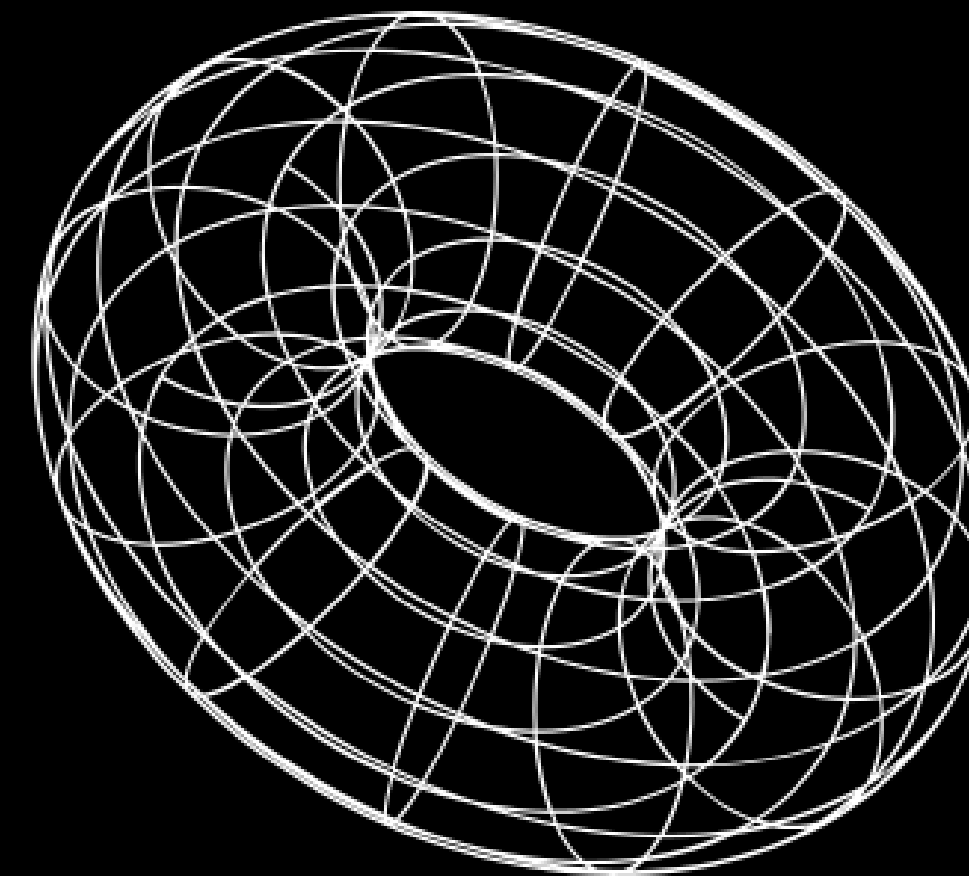
- Stores individual records of what exactly was changed.
- Helps in versioning and tracking.

4. Retrieved Update Sets

- Update Sets imported from other instances.
- Navigate to: System Update Sets > Retrieved Update Sets

5. Preview, Commit, and Backout

- Preview: Validates imported update set.
- Commit: Applies changes to the current instance.



CREATING AND MANAGING UPDATE SETS

1. Creating a New Update Set

- Navigate to:
- System Update Sets > Local Update Sets > New

2. Set as Active

- After creating the update set, open the record.
- Click "Make Active" to start capturing changes.

3. Track Captured Changes

- Navigate to:
- System Update Sets > Local Update Sets

4. Complete & Export

5. Import & Commit on Target Instance

- Navigate to:
- System Update Sets > Retrieved Update Sets

The screenshot displays the ServiceNow interface for managing update sets. The main view shows the configuration for an update set named 'mlk-gen-helsinki-themes-v1'. The state is 'In progress'. The release date is '2016-08-08 07:00:14'. The application is set to 'Global'. The description is 'New themes for your ServiceNow Geneva or Helsinki instance. www.servicenowelite.com'. Below the configuration, there is a table of customer updates. The table has columns for 'Created', 'Type', 'View', 'Target name', 'Updated by', 'Remote update set', and 'Action'. The table contains five rows of updates, all of type 'Theme', updated by 'admin', with actions of 'INSERT_OR_UPDATE'.

| Created | Type | View | Target name | Updated by | Remote update set | Action |
|---------------------|-------|------|--------------|------------|-------------------|------------------|
| 2016-08-08 07:02:34 | Theme | | Thor | admin | | INSERT_OR_UPDATE |
| 2016-08-08 07:02:35 | Theme | | Federal | admin | | INSERT_OR_UPDATE |
| 2016-08-08 07:02:35 | Theme | | Camo (Urban) | admin | | INSERT_OR_UPDATE |
| 2016-08-08 07:02:35 | Theme | | Hulk | admin | | INSERT_OR_UPDATE |
| 2016-08-08 07:02:35 | Theme | | Ironman | admin | | INSERT_OR_UPDATE |

CONCLUSION

- Update Sets are essential for migrating configuration changes across ServiceNow environments.
- They help ensure consistency, traceability, and control during development.



THANK YOU !