How do I perform ServiceNow upgrades?

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If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us.

It's important to stay on the current ServiceNow® release so you can take full advantage of the new products and capabilities as they're released *and* so you maintain the highest levels of security, availability, and performance.

How often should I upgrade?

- The ServiceNow upgrade policy states that we provide support for the two most recent release families—the current release and one release behind the current. This means you need to upgrade at least once a year to stay current. Once you fall behind the supported versions, ServiceNow will schedule an upgrade for you.

- There are two major releases each year, typically in March and September. Determine your upgrade plan (once or twice a year) and plan ahead.

What is the value of staying current?

By consistently performing upgrades to the Now Platform®, the potential benefits you can expect include:

Achieve business value faster
Increase workflow efficiency by **up to 25%***

Bring new capabilities to market faster
Get faster access to new features, reducing time spent on build-outs and developments by **as much as 80%***

Improves platform performance and the upgrade process
Reduce the time spent on upgrades by **as much as 81%***

Use the Upgrade Kit to get started.

Visit the ServiceNow Value Calculator to learn how much you can save by upgrading regularly.

*The Total Economic Impact™ Of Staying Current With ServiceNow Upgrades, a commissioned study conducted by Forrester Consulting, August 2020.

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How do I perform ServiceNow upgrades? (Continued)

What is the upgrade process?

Sub-production instances

Phase 1: Plan Read the release notes and plan your upgrade	➢ Read the release notes to understand the required upgrade and migration tasks. ➢ Complete the preparation and planning tasks in Phase 2 of the upgrade planning checklist. ➢ Evaluate the level of customization on your instances. ➢ Create a comprehensive test plan.
Phase 2: Prepare Prepare for the development instance upgrade	➢ Create a system clone of your production instance so you'll be able to simulate an upgrade on your production configuration in a non-production environment.
Phase 3: Schedule upgrade Verify your upgrade configurations and schedule the development instance upgrade in NowSupport	➢ Follow steps in the upgrade planning checklist to set up your instance for the upgrade and then schedule your upgrade in Now Support.
Phase 4: Review upgrade Upgrade and validate the development instance	➢ Track the progress of your upgrades with the Upgrade Monitor. ➢ Use the Upgrade Monitor to process the skipped list of records that were not addressed in the upgrade. ➢ Gather the update sets needed to address skipped records, changes to configurations needed for the upgrade, and items that must go live immediately after the upgrade. Then, perform functional testing.
Phase 5: Test and validate Upgrade and validate your other non-production instance(s), such as your test instance	➢ Configure and refine your development instance. ➢ Upgrade other sub-production instance(s) you have in your development to production stack. ➢ Configure your test environment to be a good representation of your production environment.
Phase 6: Remediate Prepare to upgrade the production instance	➢ Review and fix issues discovered during testing. ➢ Communicate the upgrade to stakeholders and consumers.
Phase 7: Production upgrade Upgrade the production instance	➢ After validating that your upgrade was complete, apply update sets and fix scripts. ➢ Perform post-upgrade user acceptance testing. ➢ Hold a retrospective review to identify what worked well and what you can improve next time.

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How do I perform ServiceNow upgrades? (Continued)

How can I simplify my upgrades?

➤ Automated Test Framework (ATF) is a native Now Platform application for creating and running automated testing. ATF helps you complete upgrades faster by automating complex, resource-intensive manual testing. When you upgrade, run ATF tests to confirm that the instance still works as designed.

➤ Instance Scan checks your existing configurations and helps you avoid creating future configuration issues. Instance Scan is a tool you can use as part of your development operations, release management process, and your pre- and post-upgrade processes. Use Instance Scan to interrogate your instance for configurations that indicate health issues and to identify opportunities to follow best practices.

➤ The Upgrade Center is a set of tools you can use to plan and manage your upgrades. With the Upgrade Preview module, select any release version available to you and it will generate a list of its predicted skipped changes, generate personalized release notes, and show you its known errors. Then you can schedule your upgrade and monitor its status. You can also view the summary of your latest upgrade. To manage any post-upgrade skips, use the upgrade visual task board (VTB) featured in the Upgrade Center. You can use the Upgrade History module to view all your past upgrades.

Where can I find additional content to help me upgrade?

Best practices	Product documentation	Now Support	Community support
• All about upgrades • Implement upgrades	• Release notes • Upgrade your instance • Upgrade planning checklist	• Schedule upgrades • Early Release registration • Upgrade Assist registration	• Upgrade Community • Now Creators

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