# (ServiceNow) Pre-Backup Checklist

## 1. Confirm Backup Purpose and Scope

* Determine the reason for the backup (e.g., major change, integration test, release deployment).
* Decide between a full instance backup or targeted data/table export.
* Identify impacted environments (e.g., dev, test, prod).
* Define the expected rollback scenario or restore point.

## 2. Review System Health and Performance

* Check System Diagnostics for performance issues.
* Review Instance Health Dashboard in HI for alerts or warnings.
* Ensure no scheduled maintenance or upgrades are planned during the backup window.

## 3. Freeze Configuration and Deployment Changes

* Notify developers and admins to pause changes during the backup window.
* Lock or complete any in-progress update sets.
* Avoid pushing store updates or integrations during backup.

## 4. Back Up Key Data Manually (Supplemental to Snapshot)

* Export active update sets (as XML).
* Export script components like Business Rules and Script Includes.
* Export modified catalog items, flow designer flows, or UI pages.
* Export data from custom tables or high-risk transactional tables.

## 5. Validate Email and Integration Controls

* Confirm email sending settings (disable if needed).
* Pause inbound/outbound integrations.
* Ensure no active ETL jobs, data syncs, or external API calls.

## 6. Audit the System for Pending Changes

* Review recently modified records in sys\_update\_xml, sys\_script, and related tables.
* Document unsaved or in-progress work that may be affected.

## 7. Document Environment Baseline

* Capture current system properties, plugin activations, and ACLs.
* Take screenshots or export logs for major go-live events or change tracking.

## 8. Schedule or Trigger the Backup

* Manually export high-value data for PDI or sub-prod environments.
* For production, confirm scheduled snapshots or submit HI request for on-demand backup.
* Label and organize backups for traceability (e.g., pre\_release\_backup\_July2025.xml).

## 9. Notify Stakeholders and Log Activity

* Inform team members and leadership about backup activity.
* Record backup details in the change request, release plan, or audit log.
* Define rollback criteria and assign post-backup validation steps.