

What is Batch Tracker?

Batch Tracker is a Service Portal application designed to automate and manage update set batches for lower environment instances only. Batch Tracker aggregates update sets according to encoded queries the user designs to capture specific groupings. Batch tracker to be used to batch individual update sets or groups of batches.

Batch Tracker can be used to manage small groups as little as 10 to thousands of update sets at one time. If you're hoping to batch 300 update sets spanning multiple scopes in less than 30 seconds, Batch Tracker is an application you might be interested in using.

Features

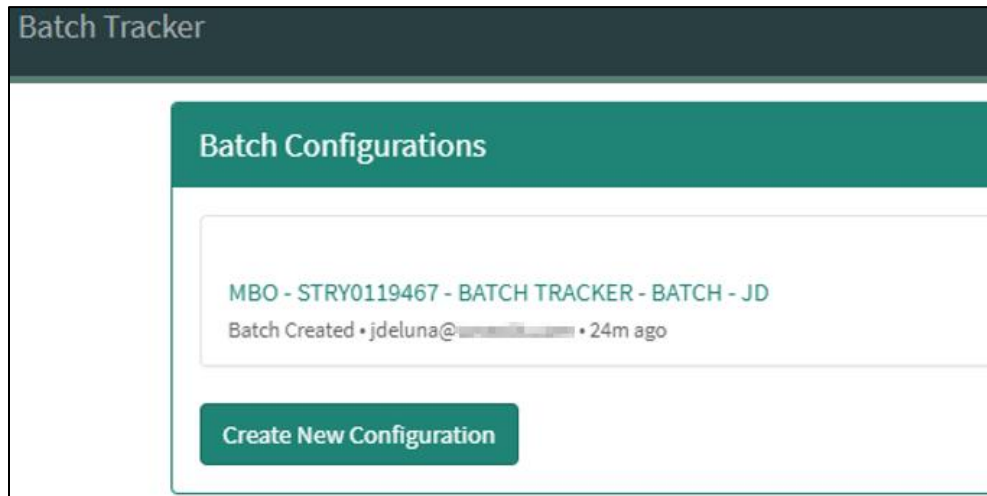
- **Manage batch configurations:** You can create encoded query configurations that will allow you visualize your batches before you create them. The advantage is that you can take a strategic approach to your release planning without updating update set states.
- **Comment recording:** Batch Tracker will capture and aggregate the comments from all your update sets. You can view these comments in the configuration record or the release report.
- **Artifacts:** Batch Tracker will capture all new artifacts included in your update sets. These can be reviewed within the configuration record or the release report.
- **Update Types:** With Batch Tracker you're able to decide on what update types you want to include in your release report. Each batch configuration can be customized for your needs.
- **Visualizer:** This feature allows you to see the exact update sets that are included in your batch. You can use this feature pre & post batch creation.
- **Complete Batch:** Once you have created your batch, it will not be ready for promotion until all the update sets are set to a status of 'Complete'. In Batch Tracker you can do this with the selection of one button.
- **Download Batch:** Selecting 'Download Batch' will automatically set all update sets to a status of 'complete' (necessary to create a batch that can be downloaded or promoted) and download your batch XML. The XML is automatically named after your batch configuration name.
- **Release Report:** The release report is a simple tool that will display every update type, the number of updates per type, the author/developer, and the scope. Additionally, update set comments are included, along with a list of all update sets listed alphabetically. Lastly, all parent/child (sub batches) are labeled so you can clearly see if your batch contains sub-batches.
- **Out-of-scope update alert:** There is a hidden configuration field that will be displayed if any update sets containing updates that are not within the update set scope. You will NOT be permitted to create a batch until the issue is corrected.

If you install this application, ALWAYS SET ITS UPDATE SETS TO 'IGORE'

Manage batch configurations

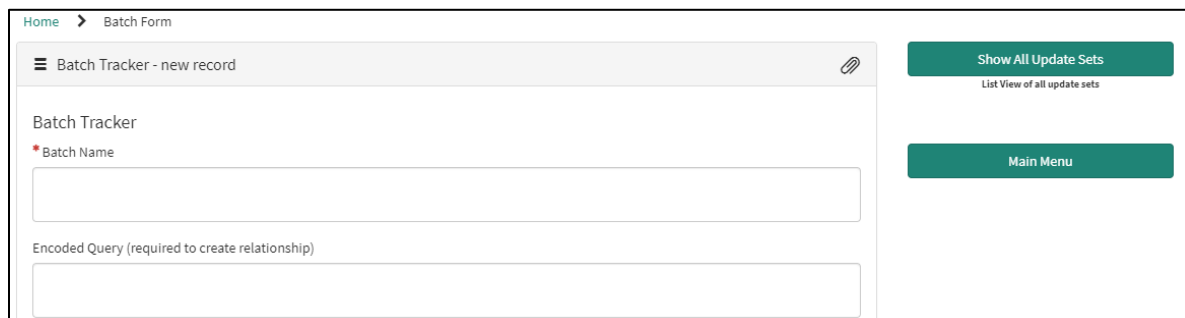
Create the configuration record

The Batch Tracker interface has purposely been kept minimal for ease of use. From the main page you can quickly create a new batch configuration record by selecting 'Create New Configuration'.



Once you choose to create a new batch configuration, you will be brought to a new Batch Tracker record. You will need to provide the name of your batch and save the record before going further.

Optionally, you can provide an encoded query at this time. Select the 'Show All update Sets' button to the right. This will open a new browser tab displaying a list of all update sets. From here you can filter the list, right-click the conditions breadcrumbs at the top of the page, copy the query, and paste that query into your batch configuration encoded query field.

The screenshot shows the 'Batch Form' for creating a new batch configuration. The breadcrumb trail at the top reads 'Home > Batch Form'. The main form area has a title 'Batch Tracker - new record' and a 'Batch Tracker' section. It contains two input fields: 'Batch Name' (with a red asterisk indicating it is required) and 'Encoded Query (required to create relationship)'. To the right of the form are two green buttons: 'Show All Update Sets' (with a subtext 'List View of all update sets') and 'Main Menu'.

You now have the basic configuration of your new batch. The encoded query field will determine which update sets are included in your batch. Keep in mind that you are never committed to a configuration. At anytime you can change the configuration and refine it as often as you choose without consequence.

It's not unusual to create a batch to simply monitor progress of a release or project. Sometimes new developers join projects mid-flight and you need to add their work to your configuration, or you realize you need to hold certain updates back for a later release. The flexibility of the Batch Tracker configuration record allows for this.

If you install this application, ALWAYS SET ITS UPDATE SETS TO 'IGORE'

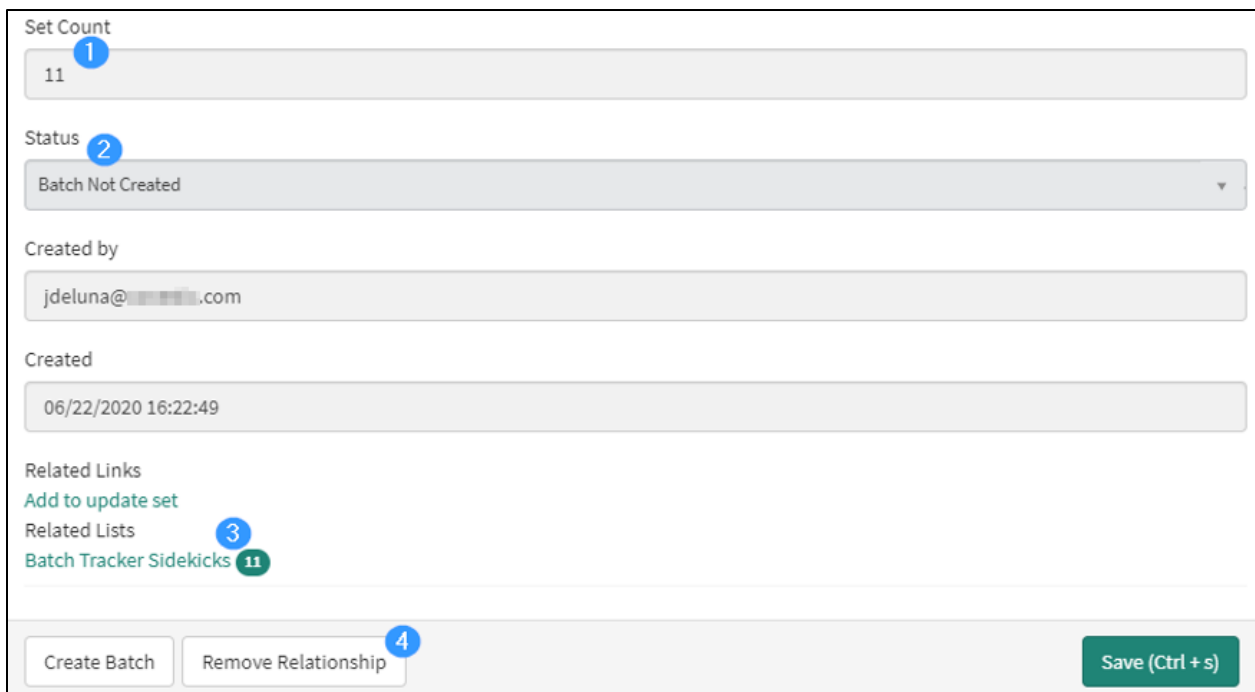
Create the relationship

After you provide a configuration name, saving the record will open additional options and features.



This screenshot shows the top section of a configuration form. It contains three buttons: a red 'Delete Configuration' button, a white 'Create Relationship' button, and a green 'Save (Ctrl + s)' button.

You will now be able to Create a relationship between the update sets in your configuration. Selecting 'Create Relationship' does not actually create a batch. It only creates a virtual batch, or a visualization of what that batch will look like. At this stage, as a release manager, you gain a sight-picture of release without confusing anyone else viewing the update set list view.



This screenshot shows the bottom section of a configuration form with several fields and a related links section. Numbered callouts (1-4) highlight specific features:

- 1. Set Count: A field displaying the number '11'.
- 2. Status: A dropdown menu showing 'Batch Not Created'.
- 3. Related Lists: A section containing a link 'Batch Tracker Sidekicks' with a count of '11'.
- 4. Remove Relationship: A button located at the bottom of the form.

Other visible fields include 'Created by' (jdeluna@...com) and 'Created' (06/22/2020 16:22:49). The bottom of the form also includes a 'Create Batch' button and a green 'Save (Ctrl + s)' button.

Once you create a relationship the bottom of the form should look like this:

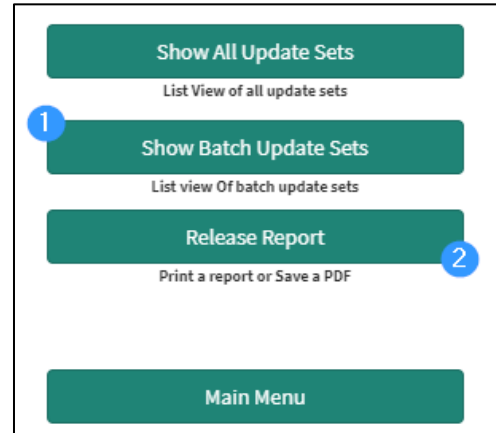
1. The configuration record will display the number of update sets in your relationship
2. The status of your batch should say 'Batch Not Created'
3. You should see a related list so you can view the individual update sets included
4. You will have the ability to remove or the relationship. **THIS DOES NOT DELETE UPDATE SETS.**

If you install this application, ALWAYS SET ITS UPDATE SETS TO 'IGORE'

Batch Update Sets	
MBO - STRY0119467 - BATCH TRACKER AUTOMATION - V1 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER AUTOMATION - V2 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER PORTAL - V1 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER PORTAL - V2 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER PORTAL - V3 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER PORTAL - V4 - JD	Complete • jdeluna@...com • Global
MBO - STRY0119467 - BATCH TRACKER PORTAL - V5 - JD	Complete • jdeluna@...com • Global
First 7 of 11 View all	

At the same time, you will also see a list of update sets to the right. This list provides a rapid confirmation of included update sets. You will have the ability to open individual update set records, view the entire list of update sets included, and confirm the update set count.

Below the Batch Update Set list is a dynamic menu array. This array will change depending on the state of the batch configuration record.



Once you have created the relationship, you will now be able to:

1. Display your batch update set list view in a separate browser tab.
2. Generate a release report that you can download or print for distribution.

Recall, at this time, you still have not created an actual batch update set, but you have a few powerful tools at your fingertips to manager your release and communicate your status with others.

As you will see later, at this stage, you already have the ability to generate a document that displays all the new release artifacts and

update set comments. This allows you to communicate with customers and developers to ensure the project is moving in the intended direction.

At this stage you will not able to change the name of the configuration record or the configuration encoded query. Additionally, you will be barred from managing update type exclusions from your release report. Everything is set for the creation of your batch.

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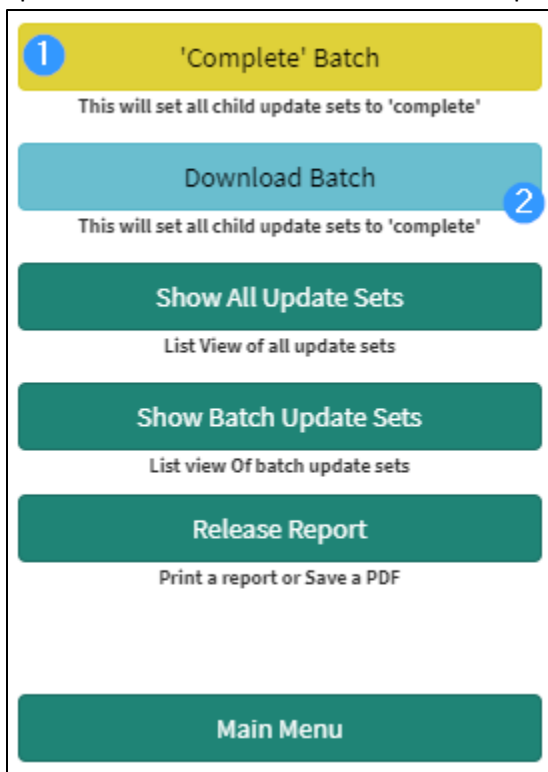
Create the batch

To create your batch update set, simply scroll to the bottom of the batch configuration record and select the 'Create Batch' button.



Remain patient and notice that at the top-right corner of the portal page, there will be three dots that visually shift to indicate a background process is taking place. This is an out-of-box portal feature that provides a standard indication to users.

When this completes, the page will refresh, and you should see a notification telling you that your batch has been created (updated). The batch is now created, but it is not ready for promotion or download. All update set records within a batch must be placed in a 'completed' state first.



While retaining all the functionality from relationship creation, you now have two additional features.

1. **'Complete' Batch:** Allows you to simply set all batch update sets to a 'completed' status. The batch is now ready for promotion to another ServiceNow instance.

2. **Download Batch:** This will automatically set all batch update sets to a 'completed' status and download an XML batch file named after your batch configuration record. This is very useful for developers or release managers who wish to backup their work on a regular basis.

At this point, you're still not committed! Even if you have 300 update sets in this batch, you may choose to remove the relationship.

Removing the relationship will clear the parent setting for each child update set in your batch.

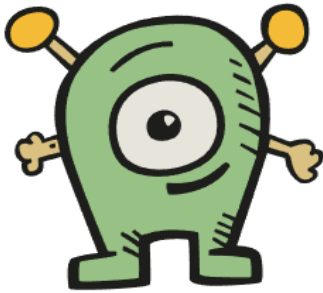
It's important to note that sub-batches always retain their integrity throughout this entire process. If you have a batch update set included in your batch, its children update sets are unaffected (I promise). Additionally, scope does not matter. It's best to make sure you are in 'global' scope when you perform this function. Your global-scoped parent will contain update sets from various scopes.

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Release Report

The Release Report is separate portal page that opens in a new browser tab. This report displays a listing of all the new updates contained in your batch, any comments in your update sets, and an alphabetical list of all included update sets.

Additionally, the update sets listed will be identified with 'parent' or 'child' to the right of the update set name if they belong to a sub-batch. If the update set is child, it will also identify the parent it belongs to.



Mars Landing Media BATCH

Release Report
Published: November 19 2024 @ 8:28

System Property - 2

marslanding.testproperty1 - System Administrator - Global
marslanding.testproperty2 - System Administrator - Global

Comments - 1

Mars Landing Batch V1

This is the parent batch for a couple of tests I'm running.

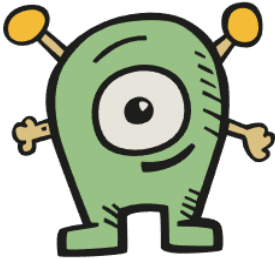
Update Sets - 3

Mars Landing 1 - admin - global - (child of Mars Landing Batch V1)
Mars Landing 2 - admin - global - (child of Mars Landing Batch V1)
Mars Landing Batch V1 - admin - global - (parent)

Because the overall batch parent (Batch Tracker batch parent) is included in this list (if you have 'created a batch', otherwise this is not the case. See next example to see primary update set listed.), it is identified with '(primary batch release update set)'. Consequently, it will also be labeled the same as your Batch Tracker configuration name.

If you install this application, ALWAYS SET ITS UPDATE SETS TO 'IGORE'

Recall, you can review/create a release report before and after you create a batch. If you've created a batch, the primary batch update set is included, otherwise it will not be.



Mars Landing Media BATCH

Release Report
Published: November 19 2024 @ 8:33

System Property - 2

marslanding.testproperty1 - System Administrator - Global
marslanding.testproperty2 - System Administrator - Global

Comments - 1

Mars Landing Batch V1

This is the parent batch for a couple of tests I'm running.


Update Sets - 4

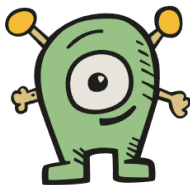
Mars Landing 1 - admin - global
Mars Landing 2 - admin - global
Mars Landing Batch V1 - admin - global
Mars Landing Media BATCH - admin - global - (primary batch release update set)

Lastly, you can print or download a PDF of your release report. This function simply uses your native laptop functions.

Batch Tracker

Print Report

 System Administrator



Mars Landing Media BATCH

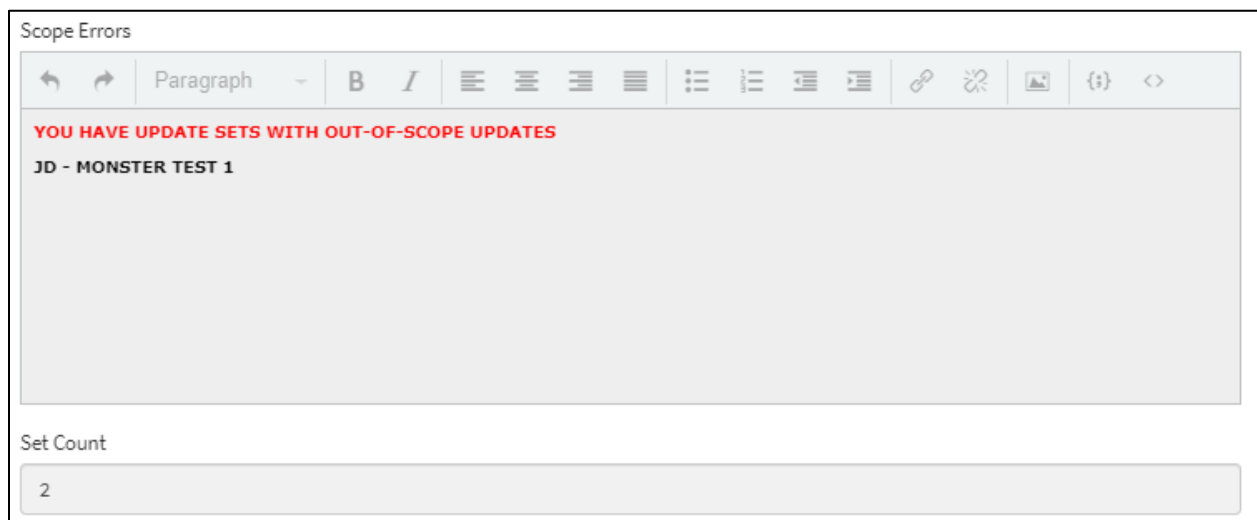
Release Report
Published: November 19 2024 @ 8:28

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Out-of-scope Alert

This feature is somewhat difficult to see in action, unless of course you have an update set with an update that is not in the same scope as your update set. This does happen occasionally by no fault of the developer. In fact, it is nearly impossible to duplicate this effect unless you turn off the appropriate business rules that maintain update set scope integrity.

If the occasion should arise that this happens to you, rest assured that your batch configuration will alert you and prevent you from creating a batch update set. The configuration will display a hidden, read-only field telling you which update set has the issue. You can simply open that update set and view the update scopes to see which one is out of place and move it.



The screenshot shows a web interface titled "Scope Errors". It features a rich text editor toolbar with options like Paragraph, Bold (B), Italic (I), and various alignment and list tools. Below the toolbar, a red alert message reads: "YOU HAVE UPDATE SETS WITH OUT-OF-SCOPE UPDATES". Underneath this message, the text "JD - MONSTER TEST 1" is displayed. At the bottom of the interface, there is a "Set Count" label and a text box containing the number "2".

When this occurs, you will only be permitted to 'Remove Relationship' at the bottom of the configuration page. The application will prevent you from creating the batch and promoting it.

Update Set Types

You can decide which types of updates you want displayed in your configuration record or your release report. You can do this separately for each configuration record you create. You can only perform this function while you DO NOT have a relationship defined.

Locate the checkbox labeled 'Update Type Exclsion (override)', just above the 'Artifacts' field. If you select this you will now see a black field called 'Update Type Exclusion (custom)' and a read-only field called 'Update Type Exclusion (core configuration – copy/paste)'. Please see the screen capture below.

If you install this application, ALWAYS SET ITS UPDATE SETS TO 'IGORE'

[illegible]

If you simply check the override box and leave the custom field blank, you are now telling Back Tracker to display every single update type recorded in your update sets. If you choose to copy and paste what is in the core configuration field, you are simply updating it to what it was out-of-the-box.

If you choose to copy/paste the core configuration and change it in the custom exclusion field, you will now have a rapid way to add ‘some’ excluded update types back into your release report or configuration artifacts field. The choice really is yours.

Conclusion

Thank you for taking the time to understand Batch Tracker. As you can now see, Batch Tracker is more than an update set batch manager, it is also way to communicate release artifacts with customers and team members. This application can be used from lower environments to rapidly promote update sets in concise cohorts or simply create a hardcopy backup.

This application's potentials are truly limitless.

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