



# UPDATE SETS

AND MERGING





# OVERVIEW

- Scopes
- Update Sets
- Update Set Transfers
- Merging Update Sets

# SCOPES

- So far, we have done most of our work in the Global scope
- Global scope means that those artifacts are available to any application that wants to access them
  - Artifacts refers to our records and data, including business rules, workflows, KBs, etc.
- Application scoping protects applications by identifying and restricting access to available artifacts and data
- All custom applications have a private scope that uniquely identifies them and their associated artifacts
- Admins can specify what parts of an application are accessible to other applications from the custom application record and each application table record
- Application scoping ensures that other applications do not interfere with its normal functioning
  - Protects against naming conflicts
- The system adds a namespace identifier to the front of application artifacts to uniquely identify them as being part of a particular scope

# UPDATE SETS

- An update set is a group of configuration and customization changes that can be moved from one instance to another
- Update sets allow administrators to group a series of changes into a named set and then move them as a unit
- Every instance has a default update set, but admins should use named update sets for migrations
- An update set is an XML file that contains:
  - A set of record details that uniquely identify the update set
  - A list of configuration changes
  - A state that determines whether another instance can retrieve and apply configuration changes
- An update set works by writing changes from tracked tables to the Customer Update table [sys\_update\_xml]
- Batch update sets let you group update sets together so that you can preview and commit them in bulk

# UPDATE SET TRANSFERS

- When an update set is completed, you can transfer it between instances to move customizations from development -> Testing -> Production
- **IMPORTANT:** when transferring update sets, be aware that changes between instances may be running different family release versions and different features
- You can always load an update set created on an older family release, but loading a newer family release may cause issues
  - Further testing may be required to determine compatibility
- Update sets cannot be transferred until their State = Complete
- Once an update set is marked as complete, it is available for other instances to retrieve
- For the next iteration of development, create a new update set, **DO NOT** change it back to In Progress

# WHAT IS CAPTURED IN AN UPDATE SET?

## Yes (Process Records)

- Business rules
- Client scripts
- UI policies
- Fields
- Forms and form sections
- Report definitions
- Tables
- Views
- List configuration
- Roles
- Flows/published workflows

## No (Data)

- New data records
- Modified data records
- Tasks
- Modified CIs
- New users and groups
- Schedules
- Scheduled jobs
- dashboards

# MERGING UPDATE SETS

- You can merge multiple update sets into a single update set
- This capability is supported for backward compatibility with earlier releases of the platform
- Batch update sets accomplishes the same outcome as merging, but with a more predictable and robust solution
- Update sets cannot be 'unmerged' once they have been merged

# DEMO

- Let's create an update set!



# TERMINOLOGY

- Update set - a group of configuration and customization changes that can be moved from one instance to another
- Update set transfer – the act of migrating configuration changes from one environment to another using an update set