



Phase 4: Data Migration, Testing & Security

Finalize and Move Update Set

Description

The *Finalize and Move Update Set* phase ensures that all configurations related to the **Software Installation Request**—including catalog items, variables, workflows, and approval logic—are packaged into a single update set and successfully migrated to another ServiceNow instance. This phase validates portability, consistency, and completeness of the implementation across instances.

Activity 1: Finalizing the Update Set (Source Instance)

Objective

To complete the update set that contains all configurations created for the Software Installation Request and prepare it for migration.

Steps Performed

1. Logged into the **source ServiceNow instance**.

Navigated to:

All → System Update Sets → Local Update Sets

- 2.
3. Opened the update set named:
Software Installation Request Setup
4. Verified that the update set contained all required components under **Customer Updates**, including:

- Catalog Item – Software Installation Request
 - Catalog Variables (Software name, Version, License justification, Urgency)
 - Question Choices (Normal, High, Critical)
 - Flow – Software Request Workflow
5. Clicked on **Scan Update Set** to ensure no missing or conflicting records were present.
6. Changed the **State** of the update set from **In Progress** to **Complete**.
7. Clicked **Update** to save the changes.
-

Observations

- All required components were successfully captured in the update set.
 - The scan completed without errors.
 - The update set was ready for export.
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Screenshot Evidence – Finalized Update Set (Source Instance)

Insert screenshot showing:

- Update Set name
- State = Complete
- Customer Updates list with catalog item and flow entries

servicenow All Favorites History Workspaces Admin Update Set - Software Installation Request Setup Search Back Out Update

Name: Software Installation Request Setup State: Complete Parent: Application: Global Created: 2026-01-01 23:48:11 Created by: admin Merged to:

Release date: Install date: 2026-01-01 23:48:12 Installed from: Description:

Related Links: Export to XML, Merge With Another Update Set, Scan Update Set, Show Update's History

Customer Updates (9) **Update Set Logs (11)** **Child Update Sets** **Install History**

Created	Type	View	Target name	Updated by	Remote update set	Action
2026-01-01 23:48:11	Variable	Select urgency level.	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	Why do you need this software?	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	Specify version (if required)	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	What software do you need?	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Question Choice	Normal	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE

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Description:

Related Links: Export to XML, Merge With Another Update Set, Scan Update Set, Show Update's History

Customer Updates (9) **Update Set Logs (11)** **Child Update Sets** **Install History**

Update set = Software Installation Request Setup

Created	Type	View	Target name	Updated by	Remote update set	Action
2026-01-01 23:48:11	Variable	Select urgency level.	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	Why do you need this software?	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	Specify version (if required)	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Variable	What software do you need?	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Question Choice	Normal	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Question Choice	High	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Question Choice	Critical	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Catalog Item	Software Installation Request	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE
2026-01-01 23:48:11	Flow	Software Request Workflow	admin	(empty)	INSERT_OR_UPDATE	INSERT_OR_UPDATE

Activity 2: Exporting the Update Set

Objective

To export the completed update set as an XML file for migration.

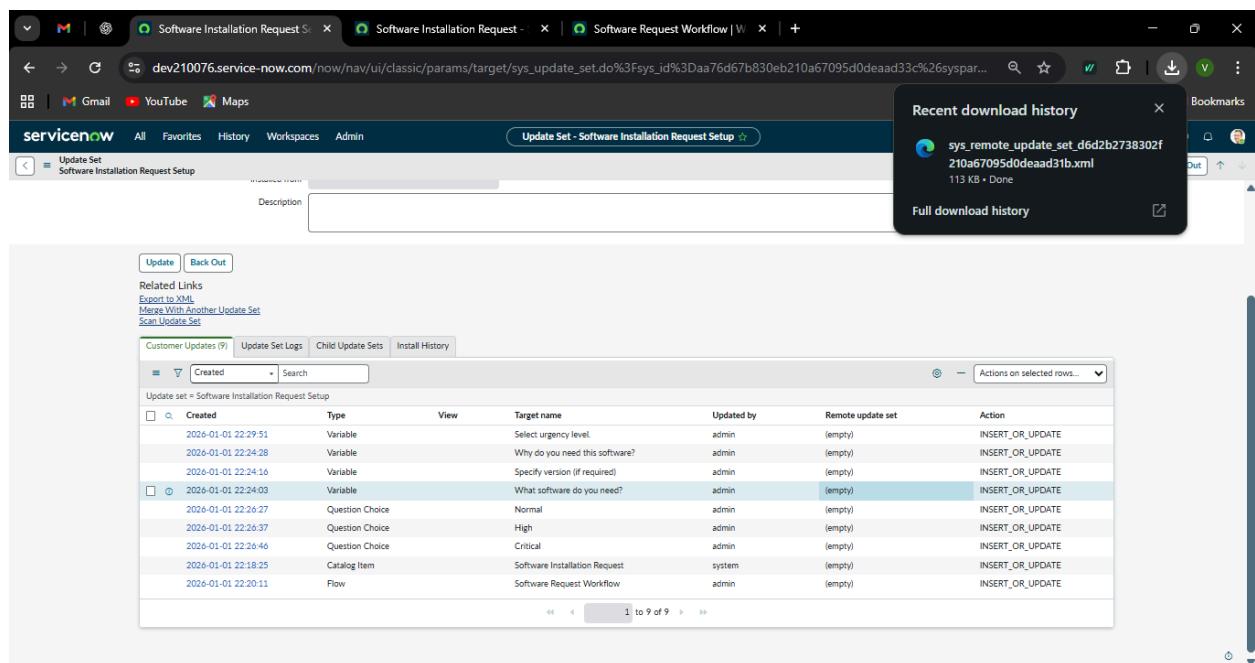
Steps Performed

1. From the finalized update set record, scrolled to **Related Links**.
2. Clicked on **Export to XML**.
3. The XML file was downloaded successfully to the local system.

📸 Screenshot Evidence – Export Update Set

Insert screenshot showing:

- Export to XML option
- Download confirmation (file name visible if possible)



The screenshot shows a ServiceNow browser interface. The top navigation bar includes links for Gmail, YouTube, Maps, and Bookmarks. The main header is "Update Set - Software Installation Request Setup". Below the header, there's a "Recent download history" modal showing a single entry: "sys_remote_update_set_d6d2b2738302f210a67095d0deead31b.xml" (113 KB). The main content area displays a table of update set items. One item in the table has a blue selection box around it. The table has columns: Created, Type, View, Target name, Updated by, Remote update set, and Action. The "Action" column for the selected item shows "INSERT_OR_UPDATE". At the bottom of the table, there's a message: "1 to 9 of 9".

Activity 3: Importing the Update Set (Target Instance)

Objective

To import the exported update set into another ServiceNow instance for testing and validation.

Steps Performed

1. Logged into the **target ServiceNow instance**.

Navigated to:

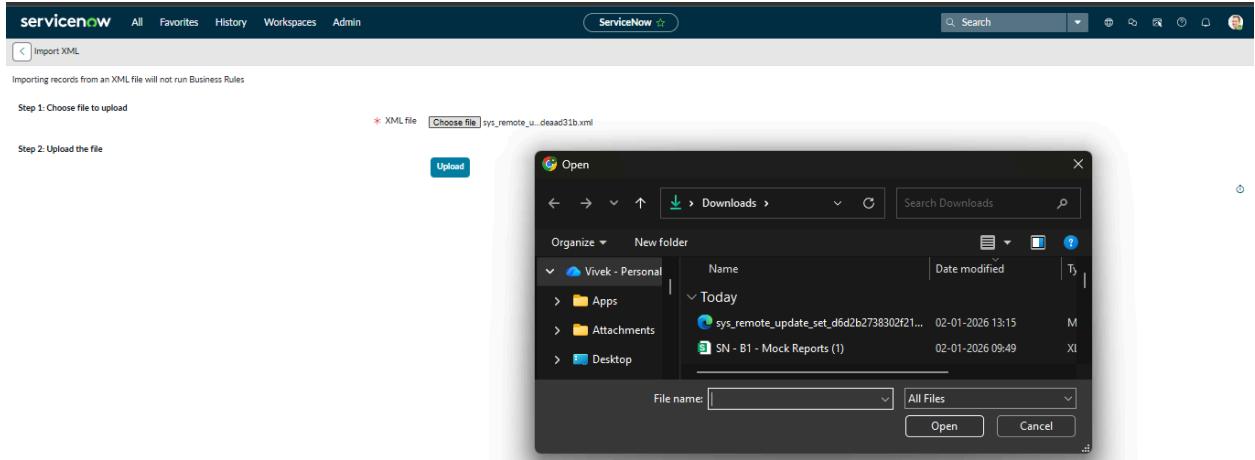
All → System Update Sets → Retrieved Update Sets

- 2.
3. Clicked on **Import Update Set from XML**.
4. Selected the previously downloaded XML file and clicked **Upload**.
5. Verified that a new retrieved update set record was created with the name:
Software Installation Request Setup

📸 Screenshot Evidence – Retrieved Update Set List

Insert screenshot showing:

- Newly imported update set in Retrieved Update Sets list



The screenshot shows the "Retrieved Update Set - Software Installation Request Setup" page. The update set is named "Software Installation Request Setup" and is global. It was retrieved from "Prest" and loaded on "2026-01-01 23:45:20". The "Description" field is empty. The "Application name" is "Global". Below this, there are buttons for "Update", "Delete", and "Preview Update Set". The "Customer Options" tab is selected, showing a table of items:

Name	Type	Target name	Table	Action
item_option_new_4436be7e3427210ae7095deead313	Variable	Select urgency level.		INSERT_OR_UPDATE
item_option_new_a6097e37822210ae7095deead375	Variable	Why do you need this software?		INSERT_OR_UPDATE
item_option_new_3709f77e322210ae7095deead377	Variable	Specify version if required.		INSERT_OR_UPDATE
item_option_new_f0944c038222210ae7095deead38d	Variable	What software do you need?		INSERT_OR_UPDATE
question_choice_0698ee783427210ae7095deead381	Question Choice	Normal		INSERT_OR_UPDATE
question_choice_e116b2682427210ae7095deead382	Question Choice	High		INSERT_OR_UPDATE
question_choice_61095638322210ae7095deead383	Question Choice	Critical		INSERT_OR_UPDATE
sc_cat_item_61095638322210ae7095deead384	Catalog Item	Software Installation Request		INSERT_OR_UPDATE
sys_hab_hab_739ade53830e2210ae7095deead39b	Flow	Software Request Workflow		INSERT_OR_UPDATE

Activity 4: Previewing and Committing the Update Set

Objective

To validate and apply the imported configurations in the target instance.

Steps Performed

1. Opened the retrieved update set record.
 2. Clicked **Preview Update Set** to analyze the changes before committing.
 3. Verified that:
 - Preview completed successfully
 - No collisions were detected
 4. Clicked **Commit Update Set** to apply all changes to the target instance.
 5. Confirmed that the commit operation completed successfully.
-

Observations

- The preview process completed without conflicts.
 - All configurations were committed successfully to the target instance.
-

Screenshot Evidence – Preview and Commit Update Set

Insert screenshots showing:

- Preview success message
- Commit success confirmation (100%)

The screenshot shows the ServiceNow interface for managing update sets. The main window displays a list of update records with the following columns:

Name	Type	Target name	Table	Action
item_option_new_463b1e783427210a0e7095d0dead313	Variable	Select urgency level.		INSERT_OR_UPDATE
item_option_new_a8d9f16783823210a0e7095d0dead375	Variable	Why do you need this software?		INSERT_OR_UPDATE
item_option_new_b780922783823210a0e7095d0dead3c7	Variable	Specify version (if required)		INSERT_OR_UPDATE
item_option_new_f0b44ca363823210a0e7095d0dead38d	Variable	What software do you need?		INSERT_OR_UPDATE

A modal dialog at the top right indicates that the update set has been committed successfully: "Update set committed - Succeeded in 1 Second".

The screenshot shows the ServiceNow interface for managing update sets. The main window displays a list of update records with the following columns:

Name	Type	Target name	Table	Action
item_option_new_463b1e783427210a0e7095d0dead313	Variable	Select urgency level.		INSERT_OR_UPDATE
item_option_new_a8d9f16783823210a0e7095d0dead375	Variable	Why do you need this software?		INSERT_OR_UPDATE
item_option_new_b780922783823210a0e7095d0dead3c7	Variable	Specify version (if required)		INSERT_OR_UPDATE
item_option_new_f0b44ca363823210a0e7095d0dead38d	Variable	What software do you need?		INSERT_OR_UPDATE

A modal dialog at the top right indicates that the update set has been committed successfully: "Update set committed - Succeeded in 1 Second".

Activity 5: Post-Migration Validation

Objective

To ensure that all migrated components function correctly in the target instance.

Validation Steps

Navigated to:

All → Service Catalog → Catalog Definitions → Maintain Items

- 1.
2. Opened **Software Installation Request** catalog item.
3. Verified that:
 - All catalog variables were present and configured correctly.
 - Question choices (Normal, High, Critical) were available.
4. Navigated to **Flow Designer** and opened **Software Request Workflow**.
5. Confirmed that the flow was active and included:
 - Approval action
 - Conditional logic
 - Catalog task creation
6. Performed a test submission of the catalog item and verified:
 - Request (REQ) creation
 - Requested Item (RITM) creation
 - Approval processing
 - Catalog Task (SCTASK) generation

Screenshot Evidence – Validation

Insert screenshots showing:

- Catalog item with variables

- Active workflow
- Generated REQ, RITM, and SCTASK records

Request installation of licensed software

* What software do you need?
IntelliJ

Specify version (if required)
2021

* Why do you need this software?
Eclipse working space

* Select urgency level.
 Normal
 High
 Critical

Add attachments

Choose a file or drag it here.
Copy and paste clipboard files here.

Quantity: 1

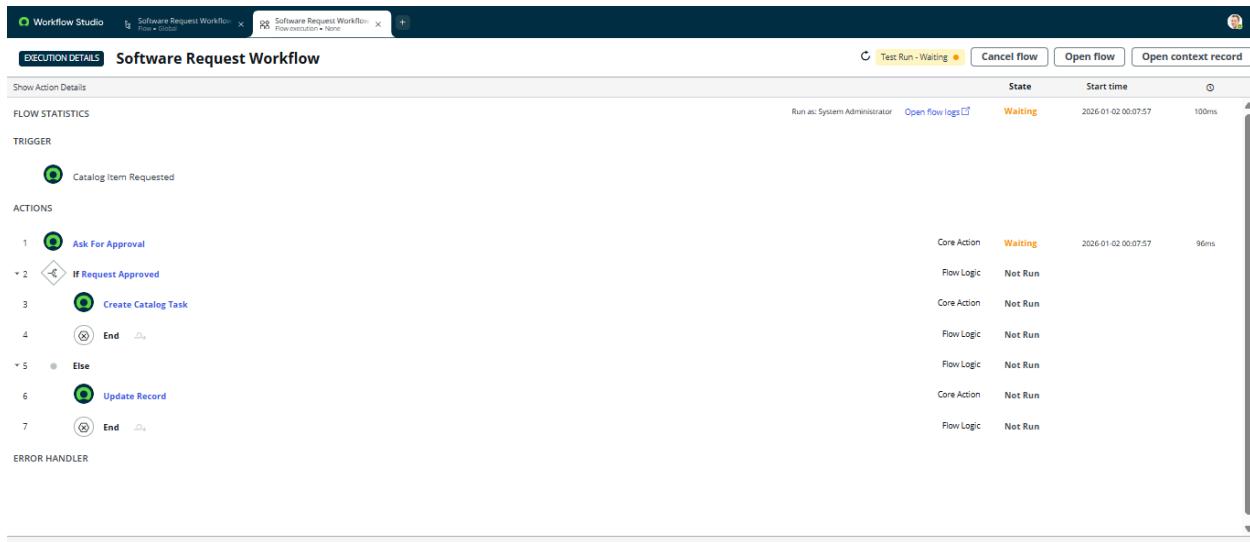
Delivery Time: 0 Days

Add to Cart
 Save as Draft
 Order Now

Submitted: 2026-01-02 00:07:34
Request Number: REQ0010015
Estimated Delivery: 2026-01-02

Item	Delivery Date	Stage	Price (each)	Quantity	Total
Software Installation Request	2026-01-02		---	1	---

Total: \$0.00



servicenow All Favorites History Workspaces Admin Request - REQ0010015

Request - REQ0010015

Number: REQ0010015
Requested for: System Administrator
Location:
Due date: 2026-01-02 00:07:33
Price: \$0.00
Description:
Short description:
Special instructions:

Opened: 2026-01-02 00:07:34
Opened by: System Administrator
Approval: Approved
Request state: Approved

Update Cancel Request Copy Delete

Requested Items (1) Approvers

Number Search Actions on selected rows...

Number	Quantity	Catalog	Item	Due date	Price	Assigned to	Stage
RITM0010015	1 (empty)	Software Installation Request		2026-01-02 00:07:33	\$0.00 (empty)		

1 to 1 of 1

servicenow All Favorites History Workspaces Admin Requested Item - RITM0010015

Number: RITM0010015 Item: Software Installation Request Request: REQ0010015 Requested for: System Administrator Due date: 2026-01-02 00:07:33 Configuration item:

Opened: 2026-01-02 00:07:33 Opened by: System Administrator Stage: Request Approved State: Open Quantity: 1 Estimated delivery:

Watch list: [Watch](#) [Unwatch](#)

Variables

- * What software do you need?
intelliJ
- Specify version (if required)
2021
- * Why do you need this software?
Eclipse working space
- * Select urgency level.
 Normal
 High
 Critical

servicenow All Favorites History Workspaces Admin Requested Item - RITM0010015

Activities: 3

- System Administrator requested to approve task
- System Administrator requested to approve task
- System Administrator
 - Impact: 3 - Low
 - Opened by: System Administrator
 - Priority: 4 - Low
 - State: Open

Comments • 2026-01-02 00:07:57

Comments • 2026-01-02 00:07:36

Field changes • 2026-01-02 00:07:23

[Update](#) [Delete](#)

Related Links [Edit Context](#)

Catalog Tasks Approvers (2) Group approvals

Created	Search	Actions on selected rows...	Edit
Approval for RITM0010015			
<input type="checkbox"/> State	Approver	Comments	Created
● Requested	System Administrator		2026-01-02 00:07:57
● Requested	System Administrator		2026-01-02 00:07:36

1 to 2 of 2

Workflow Studio Software Request Workflow Flow • Robot Software Request Workflow Flow execution • None

EXECUTION DETAILS Software Request Workflow

Hide Action Details

ACTIONS

- Ask For Approval
- If Request Approved
- Create Catalog Task

Core Action Completed 2026-01-02 00:07:57 240ms

Flow Logic Evaluated - True 2026-01-02 00:09:55 96ms

Core Action Waiting 2026-01-02 00:09:05 96ms

Configuration Details

VARIABLE NAME	RUNTIME VALUE	CONFIGURATION	TYPE
Table Name	sc_task	sc_task	Table Name
Requested Item	RITM0010015	Trigger ... → Requested item ...	Reference
Short Description	Software installation task	Software installation task	String
Fields	assignment_group=31f2f16f83c63210a67095d0deaa3c9 description=Install the requested software as per ...	assignment_group("display": "Software Support", "value": "31f2f16f83c63210a67095d0deaa3c9", "sys_id": "...")	Template Value
Wait	true	1	True/False
Template Catalog Item	SCTASK0010025	task	Reference
Catalog Variables			Slush Bucket

Output Data

VARIABLE NAME	RUNTIME VALUE	CONFIGURATION	TYPE
Action Status			Object
Catalog Task	SCTASK0010025	task	Document ID
Don't Treat as Error	false		True/False

No Logs

Catalog Task SCTASK0010025

Number: SCTASK0010025

Assigned to:

Assignment group: Software Support

Configuration item:

Active:

Approval: Not Yet Requested

Priority: 4 - Low

State: Open

Request item: RITM0010015

Requested for: System Administrator

Short description: Software installation task

Description: Install the requested software as per approved request.

Work notes: Work notes

Post

Activities: 1

System Administrator

Impact: 3 - Low

Opened by: System Administrator

Priority: 4 - Low

State: Open

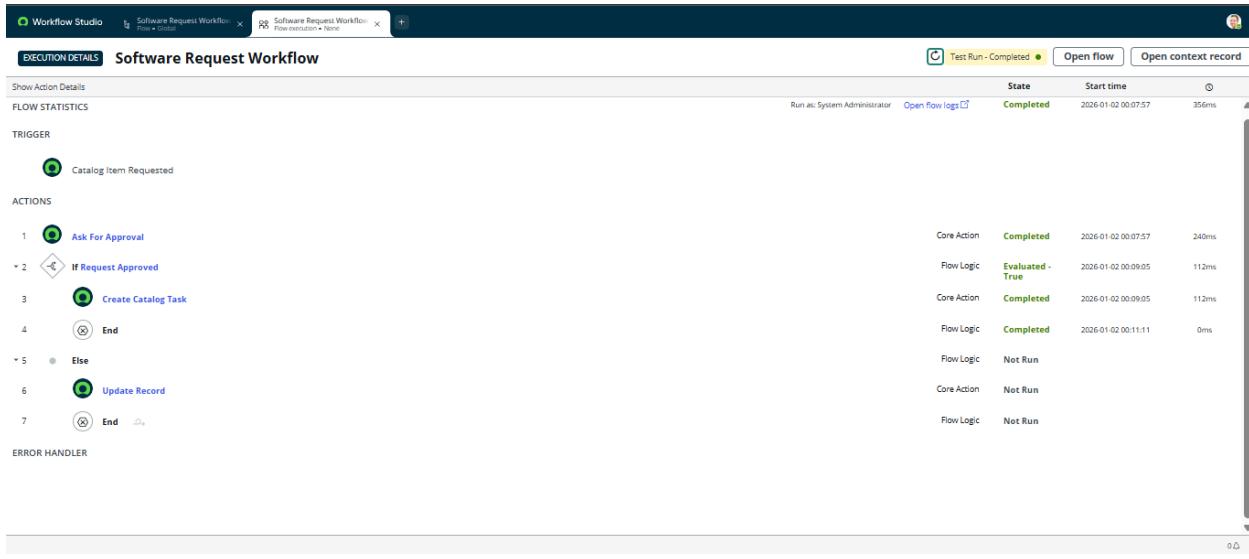
Field changes • 2026-01-02 00:09:05

Update Close Task Delete

Affected CIs Approvers Group approvals

Task = SCTASK0010025

Configuration Item	Class	Support group	Owned by	Applied	Applied date	Manual proposed change	Updated
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Outcome

The update set migration was completed successfully. All configurations related to the Software Installation Request—including catalog items, workflows, approvals, and tasks—were transferred accurately to the target instance. Post-migration validation confirmed that the solution functions as expected, ensuring consistency, usability, and reliability across ServiceNow environments.