

## Phase 4: Data Migration, Testing & Security

### Finalize and Move Update Set

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#### 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.

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#### 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.

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##### 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.
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## Observations

- All required components were successfully captured in the update set.
  - The scan completed without errors.
  - The update set was ready for export.
- 



### Screenshot Evidence – Finalized Update Set (Source Instance)

*Insert screenshot showing:*

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



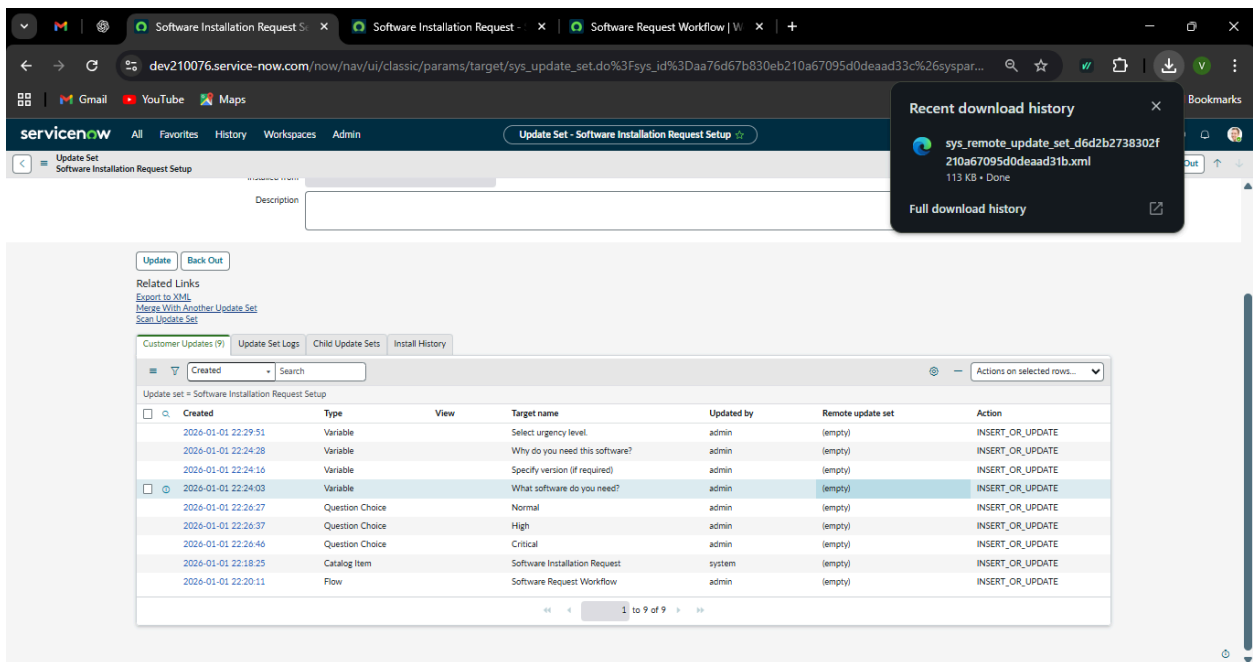
## Steps Performed

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 the ServiceNow interface for a 'Software Installation Request Setup' update set. The 'Related Links' section includes the 'Export to XML' option. A download confirmation dialog is visible, showing the file name 'sys\_remote\_update\_set\_d6d2b2738302f210a67095d0deead31b.xml' and its size '113 KB'.

Recent download history

File Name	Size	Status
sys_remote_update_set_d6d2b2738302f210a67095d0deead31b.xml	113 KB	Done

Full download history

Update Set - Software Installation Request Setup

Update Set: Software Installation Request Setup

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

Created | Search

Created	Type	View	Target name	Updated by	Remote update set	Action
2026-01-01 22:29:51	Variable		Select urgency level.	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:24:28	Variable		Why do you need this software?	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:24:16	Variable		Specify version (if required)	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:24:03	Variable		What software do you need?	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:26:27	Question Choice		Normal	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:26:37	Question Choice		High	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:26:46	Question Choice		Critical	admin	(empty)	INSERT_OR_UPDATE
2026-01-01 22:18:25	Catalog Item		Software Installation Request	system	(empty)	INSERT_OR_UPDATE
2026-01-01 22:20:11	Flow		Software Request Workflow	admin	(empty)	INSERT_OR_UPDATE

1 to 9 of 9

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## Activity 3: Importing the Update Set (Target Instance)

### Objective

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

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### Steps Performed

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

Navigated to:

All → System Update Sets → Retrieved Update Sets

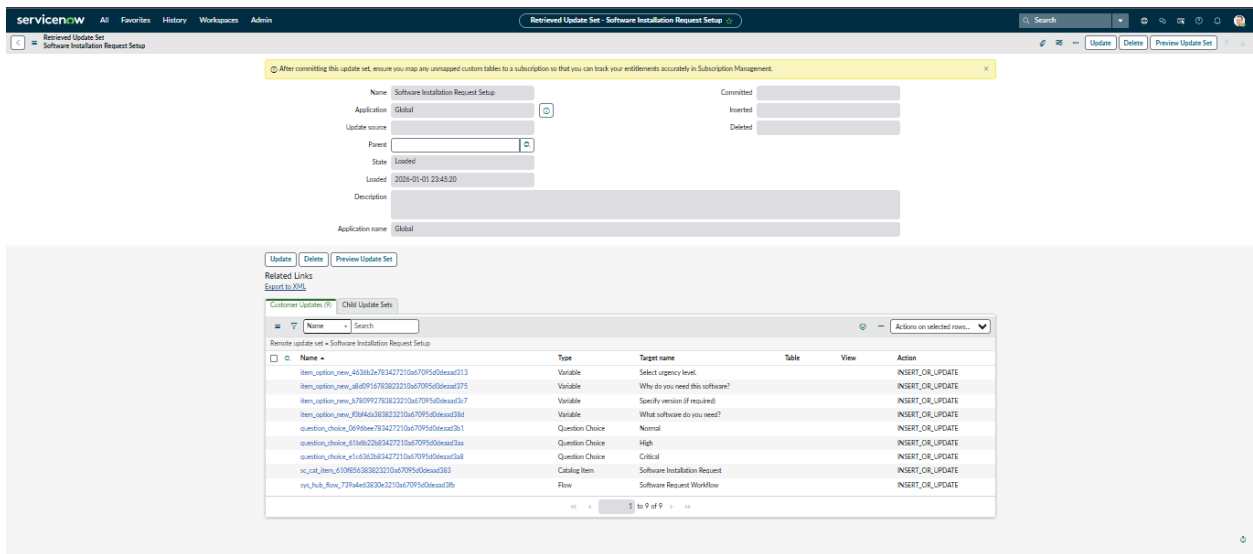
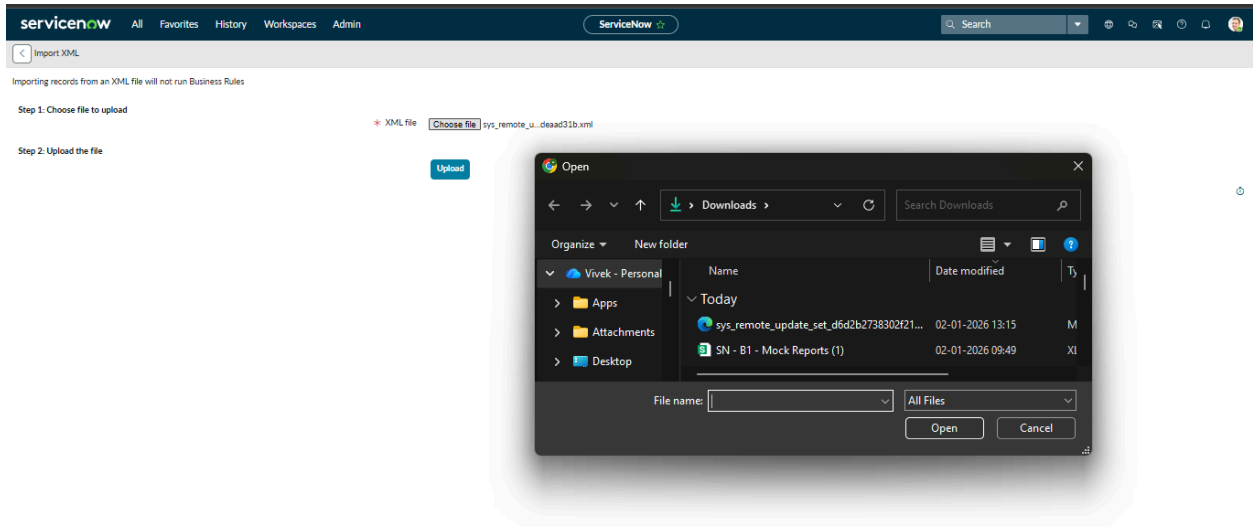
- 2.
3. Clicked on **Import Update Set from XML**.
4. Selected the previously downloaded XML file and clicked **Upload**.
5. Verified that a new retrieved update set record was created with the name:  
**Software Installation Request Setup**

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### Screenshot Evidence – Retrieved Update Set List

*Insert screenshot showing:*

- Newly imported update set in Retrieved Update Sets list



## 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.
- 

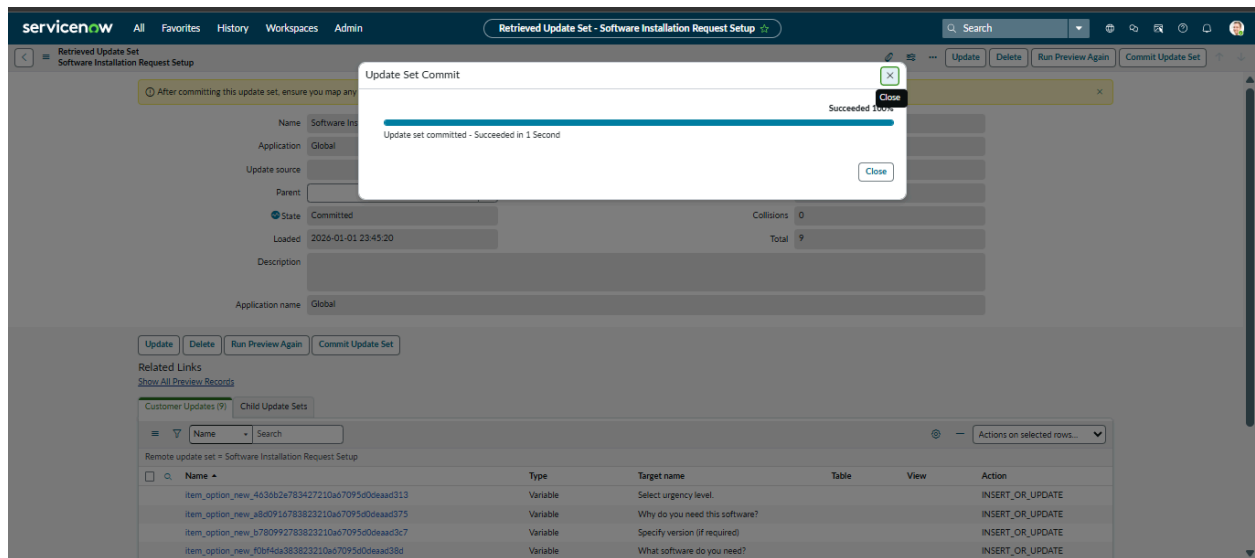
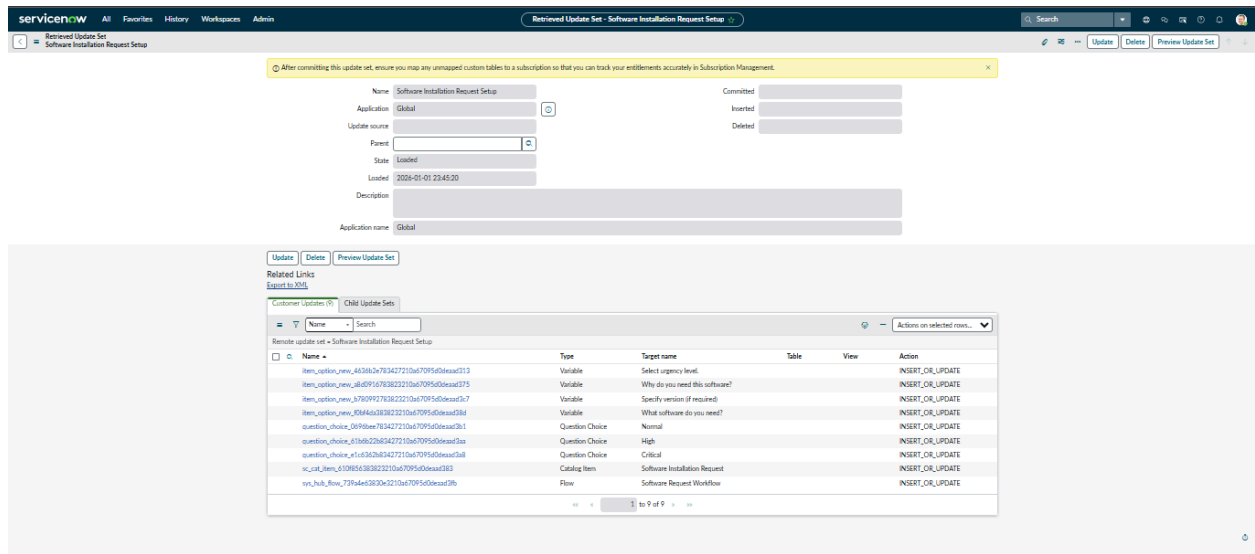
## Observations

- The preview process completed without conflicts.
  - All configurations were committed successfully to the target instance.
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## Screenshot Evidence – Preview and Commit Update Set

*Insert screenshots showing:*

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



## 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

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#### Screenshot Evidence – Validation

*Insert screenshots showing:*

- Catalog item with variables

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

servicenow

Knowledge

Catalog

Requests

System Status

Cart

Tours

System Administrator

Home > Service Catalog > Software > Software Installation Request

Search Catalog

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

servicenow

KnowledgeCatalogRequestsSystem StatusMy CartToursSystem Administrator

Home > Request Summary - REQ0010015

Search Catalog

Q

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

Item	Delivery Date	Stage	Price (each)	Quantity	Total
<a href="#">Software Installation Request</a>	2026-01-02		--	1	--
					Total: \$0.00

Workflow Studio

Software Request Workflow

Software Request Workflow

EXECUTION DETAILS

Software Request Workflow

Test Run - Waiting

Cancel flow

Open flow

Open context record

Show Action Details

State

Start time

FLOW STATISTICS

Run as: System Administrator

Open flow logs

Waiting

2026-01-02 00:07:57

100ms

TRIGGER

Catalog Item Requested

ACTIONS

1

Ask For Approval

Core Action

Waiting

2026-01-02 00:07:57

96ms

2

If Request Approved

Flow Logic

Not Run

3

Create Catalog Task

Core Action

Not Run

4

End

Flow Logic

Not Run

5

Else

Flow Logic

Not Run

6

Update Record

Core Action

Not Run

7

End

Flow Logic

Not Run

ERROR HANDLER

servicenow

All

Favorites

History

Workspaces

Admin

Request - REQ0010015

Search

Request - REQ0010015

Discuss

Follow

Update

Cancel Request

Copy

Delete

Number

REQ0010015

Opened

2026-01-02 00:07:34

Requested for

System Administrator

Opened by

System Administrator

Location

Due date

2026-01-02 00:07:33

Approval

Approved

Price

\$0.00

Request state

Approved

Description

Short description

Special instructions

Update

Cancel Request

Copy

Delete

Requested Items (1)

Approvers

Number

Search

Actions on selected rows...

Request = REQ0010015

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

AllFavoritesHistoryWorkspacesAdmin

Requested Item - RITM0010015

Search

Requested Item  
RITM0010015

DiscussFollowUpdateDelete

NumberRITM0010015

ItemSoftware Installation Request

RequestREQ0010015

Requested forSystem Administrator

Due date2026-01-02 00:07:33

Configuration item

Watch list

Opened2026-01-02 00:07:33

Opened bySystem Administrator

StageRequest Approved

StateOpen

Quantity1

Estimated delivery

Backordered

Order Guide

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

AllFavoritesHistoryWorkspacesAdmin

Requested Item - RITM0010015

Search

Requested Item  
RITM0010015

DiscussFollowUpdateDelete

Activities: 3

System Administrator

System Administrator requested to approve task

Comments • 2026-01-02 00:07:57

System

System Administrator requested to approve task

Comments • 2026-01-02 00:07:36

System Administrator

Field changes

2026-01-02 00:07:33

Impact3 - Low

Opened bySystem Administrator

Priority4 - Low

StateOpen

UpdateDelete

Related Links

Flow Context

Catalog TasksApprovers (2)Group approvals

CreatedSearch

Actions on selected rows...Edit

Approval for = RITM0010015

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

Software Request Workflow

EXECUTION DETAILS

Software Request Workflow

Test Run - WaitingCancel flowOpen flowOpen context record

Hide Action Details

StateStart time

ACTIONS

1

Ask For Approval

Core Action

Completed

2026-01-02 00:07:57

240ms

2

If Request Approved

Flow Logic

Evaluated - True

2026-01-02 00:09:05

96ms

3

Create Catalog Task

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=31f2f16f83c63210a67095d0dead3c9description=Install the requested software as per ...	assignment_group={"display":"Software Support","value":"31f2f16f83c63210a67095d0dead3c9","sys_id":"...}	Template Value
Wait	true	1	True/False
Template Catalog Item			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

FollowUpdateClose TaskDelete

Number

SCTASK0010025

Assigned to

Software Support

Assignment group

Software Support

Configuration item

Active

Active

Short description

Software installation task

Description

Install the requested software as per approved request.

Work notes

Work notes

Post

Approval

Not Yet Requested

Priority

4 - Low

State

Open

Request item

RITM0010015

Requested for

System Administrator

Activities: 1

System Administrator

Impact

3 - Low

Opened by

System Administrator

Priority

4 - Low

State

Open

Field changes

2026-01-02 00:09:05

UpdateClose TaskDelete

Affected CIs

Configuration Item

Search

Task

SCTASK0010025

Configuration Item

Class

Support group

Owned by

Applied

Applied date

Manual proposed change

Updated

Workflow Studio

Software Request Workflow

Software Request Workflow

EXECUTION DETAILS

Software Request Workflow

Test Run - Completed

Open flow

Open context record

Show Action Details

Run as: System Administrator

Open flow logs

State

Start time

FLOW STATISTICS

Run as: System Administrator

Open flow logs

Completed

2026-01-02 00:07:57

356ms

TRIGGER

Catalog Item Requested

ACTIONS

1

Ask For Approval

Core Action

Completed

2026-01-02 00:07:57

240ms

2

If Request Approved

Flow Logic

Evaluated - True

2026-01-02 00:09:05

112ms

3

Create Catalog Task

Core Action

Completed

2026-01-02 00:09:05

112ms

4

End

Flow Logic

Completed

2026-01-02 00:11:11

0ms

5

Else

Flow Logic

Not Run

6

Update Record

Core Action

Not Run

7

End

Flow Logic

Not Run

ERROR HANDLER

## 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, reusability, and reliability across ServiceNow environments.