

Project Development Phase Model Performance Test

Date	02 JULY 2025
Team ID	LTVIP2025TMID30284
Project Name	EDUCATIONAL ORGANISATION USING SERVICENOW
Maximum Marks	2

✓ 1. Log in to your ServiceNow Instance

Use your **developer instance** or the instance assigned to your educational organization.

🧰 2. Create a New Update Set

1. Navigate to **System Update Sets > Local Update Sets**.
 2. Click **New**.
 3. Fill in the fields:
 - **Name:** EDU_Org_Customizations (or something specific, e.g., Student_Services_Portal)
 - **Description:** Example – “Update set for student support portal, catalog items, and knowledge base setup.”
 - **State:** Keep as In Progress.
 4. Click **Submit**.
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🔧 3. Set the Update Set as Current

After creating it:


1. Go back to **System Update Sets > Local Update Sets**.
2. Click the name of your newly created update set.
3. Click **Make Current** (top right corner).

🔔 Now, any change you make (forms, workflows, UI policies, etc.) will be captured in this update set.

✏️ 4. Make Your Customizations

Create or modify objects such as:

- Service Catalog Items (e.g., "Request Transcript", "Wi-Fi Access")
- Workflows or Flows (e.g., for Admissions Requests)
- Knowledge Articles
- Service Portal widgets or pages
- Email Templates (e.g., Registration Confirmations)
- Roles/Groups for departments (e.g., Registrar, Financial Aid)

 Only changes that are tracked by update sets will be included — data like users, groups, or incidents usually **won't** be.

5. Close and Export the Update Set

Once you're done:

1. Go back to the Update Set record.
2. Change **State** to `Complete`.
3. Click the **Export to XML** button.

This generates an XML file that can be **imported into another instance**, like production or testing.

6. Import to Another Instance (Optional)

On the target instance:

1. Navigate to **System Update Sets > Retrieved Update Sets**.
 2. Click **Import Update Set from XML**.
 3. Upload your XML file.
 4. Preview → Commit.
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Tips for Educational Institutions

Use Case	What to Capture in Update Set
Student Services Portal	Custom portal pages, widgets, categories
IT Helpdesk	Incident form customizations, assignment rules
Admissions Automation	Flows, catalog items, approval workflows

Use Case	What to Capture in Update Set
Knowledge Base	Article templates, categories
Departmental Roles	Custom roles (ACLs may be captured)