**Express to Enterprise Upgrade Script**

**Express To ITSM Upgrade //**

**Paired with ETIU Services Kick-off 2017 v3.0 Slide Deck**

**Introduction + Set Up (Slide #1)**

**Can you see my screen?** **Will there be anyone else joining this call?**

"Is it alright that I record this, for future training purposes?"

We are now recording.

**Agenda (Slide #2)**

Today what we'll be doing is going through an hour long presentation that will walk you through what the upgrade process is, how it works, and give you some information about your upgraded instance and what it looks like under the hood.

* Review the upgrade roadmap today, to make sure we are on the same page in terms of the schedule

**XXXXX**For the second half of this session, we already have your enterprise developer instance generated and upgraded, so for the second half of this call I'll have you:

* Take over and share your screen, and we'll:
* Jump into your developer instance to take a look at some of the key new features now available to you with Enterprise

**Who Are We (Slide #3)**

My name is Will, and I am part of a team of other **Remote Services Professionals** that work across the country. **If there is anything I am unable to answer for you, our team should be able to get the answer for you.**   
  
((There are some things that do lie outside the scope of the Remote Services Department and really more in the hands of your Sales Rep. We will work with you as much as possible to get in contact with them, but sometimes really the *quickest way* to get that information from your Sales Rep is for you actually to get in contact with them yourself.))

**My goal here is really twofold:**

1. To make sure you are upgraded in a technically sound manner. We begin this process with a technical validation that has been done on your developer instance, and we'll get more into how that plays into the whole upgrade process in a moment. **-and then-**
2. As we upgrade you, our goal is that you're feeling confident and secure with your new instance! Having some knowledge about what is there and available to you now, but also where you can go to get more knowledge, or more assistance with your training.

**Review Slide #4**

* Go through each of the points on the actual slide

**Critical Success Factors (Slide #5)**

**There are a few more points I'd like to make as we continue here:**

* Your participation is a critical part of the success of this process. We have a timeline, but we are really working together here to achieve that timeline. And sticking to that timeline really depends on your participation as much as mine.
* If you are working with a Service Partner, we want to reach out to them to ensure they have the information they need.

*Are you working with a Service Partner?*

If **YES:** Need contact information

If **NO:** Nothing required, move on. Service Partner can help with development and learning new features in your instance if you don’t feel you have the bandwidth currently.

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Aja's Experience (Optional) The shift from Express to Enterprise.. Once you're onto Enterprise, if you continue to use the instance the same way, you'll see a lot more available to you. You can choose to not use the Enterprise features and only use the Express features. I do not recommend it, as you'll find the Enterprise features can make your life a whole lot easier, but that is an option. If you are looking to take advantage of some of the more compex Enterprise features (or even just shifting to them), I recommend getting some support early on in your joruney, as I see clients that have that support are more successful long term.

They also save money, time, and energy down the road, the reason for that being because Enterprise has so many moving pieces, there being so much we can now do with incorporating scripting, since there are now so many options you may be moving forward in a direction that you really don't want to be going long term, and could need to be un-done. Doesn't necessarily have to be a Service Partner or Remote Admin hours, it could be going to a local ServiceNow meetup group, or even taking the time to do some of the training (some is free, some do have a cost), reading documentation. As long as you recognize that in Express, while you could jump in and make configurations without worrying too much long term, with Enterprise we want to think carefully about what we are doing and how we set things up.

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**How does this all work? (Slide #6)**

You have currently your **Express Production Instance**. What we've already done is:

* Spun up a new ***Express Instance***
* Cloned your **Express Production Instance** (your ***current live instance***) down to that new **Express Instance**, so that we have a **copy**, and then
* We performed the upgrade process on that cloned, copied **Express Instance.**

That is seperate from your **Production Instance**, so there has been no **business impact**. That **cloned instance**, where we performed the *upgrade process*, that is now your **Enterprise Development Instance,** sometimes referred to as your ***Sub-Production (or sub-prod) Instance***. But that is your **Developer (or Dev) Instance**, and it is now on **Enterprise**.

So what we want to do here is during the second half of this call is:

* Take a look in it and explore some of the new features.

But for the next two days, you'll be validating that ***Developer Instance***, and I'll talk a little more about what you're doing during that ***validation process***, and then once your **validation** is complete, we perform the **Production Upgrade** (the *Prod Upgrade*), and during this **Production Upgrade** (the upgrade of your live, **Production Instance**), there **is a business impact**. Your instance is *unavailable for 2-4 hours*.

It says 2 hours on the slide, but I like to say 2-4 hours so that we have that buffer.

* Generally it is closer to 2, but just to stay safe we give all of our **Production Upgrades** a little more time as sometimes the upgrade can run over 2 hours. We begin that live **Production Upgrade** at 11pm, and we do this local time to avoid taking the instance during normal business hours.

**May I ask what time zone you are located in?** *EXAMPLE ANSWER*: Eastern. Ok.

So we could schedule that **Production Upgrade** (do not have to answer right this second, I am still going to be giving you some more information on the ***validation process***), but we could schedule this for as soon as:

* **11pm Tuesday (*1 day after this call*)**, or if that's too soon, we could do:
* **11pm Wednesday**
  + We wouldn't want to push it too much further out than that.
  + Then, after that **Production Upgrade**, we have another meeting together, this one being our **Best Practice** session.
* To ensure the accuracy of your data we like to schedule this **Upgrade** between 24-48 hours after this call ends

**During our Best Practice session, we'll be talking about:**

* How you move configurations from your **Developer Instance** to your **Production Instance** using Update Sets.
  + Do you have any ***resources*** already available to you to help you with the administration of your instance?
* To make sure we are getting the *most use* out of these upcoming sessions, do you have a **system administrator** with ***Enterprise Experience*** who will be taking over, or will it be an **Express Sys-Admin** who will be learning **Enterprise**?
* We want to do this soon as possible after the upgrade has been run.
  + Suggest the day after the upgrade, and then the day after
* Next 5 Days: Personal Upgrade Helpline Available
  + You'll have a helpline available to you 5 days pertaining to issues from the upgrade itself

**Today, we'll have your Guided Tour**

This is a high level introduction to some new key features available to you in your **Enterprise Instance**. There are *a lot of topics* on here, anything that we do not get to **cover today** we'll be able to review during our *Best Practices* session, but we'll take a look at:

**Slide #10**

* The Graphical Workflows
* Contextual Security
* SLA's
* We'll look at many of the key places in your new Enterprise instance where you can implement scripting.

Do you have any **development background** or **scripting** knowledge personally? (No worries if you do not!)

* You will *not* be **scripting** most of the time, but that feature is available to you.
* It is not *very heavy scripting*, it is utilizing **JavaScript** and enables you to do *more* than you could without scripting, but that being said there is **A LOT** that you can do *without* scripting at all.

Something I've found is coming from **Express**, and having some *knowledge* of scripting background but not so much it's your *first instinct* to put yourself into a scripting solution, actually positions you in a good place!

* Because **Best Practice** is:
  + If you can do something with a *conditional drop down*
  + If you can do something through **configuration** rather than customized **scripting**, we want to take that approach first because it's going to be more cost-efficient for your **organization** in the long-run
* **It's faster too!**
  + Instead of reading another *developer's script* and try to get into their head to see their real intentions for why they wrote their script the way they did, we can utilize the configuration options that Enterprise gives us that you are already familiar with in a lot of areas in Express, it's a little more *straightforward* and *easier* to pick up for someone else down the line.

For the **Best Practice Session**, we'll look at **Update Sets**.

* Are you familiar with **Update Sets** at all?
* We want to make sure that you are set up to pull your Update Sets from Dev to Prod, so there's some setup we'll do together.
* Same with **Cloning**, we'll show you how to request a system clone and ensure that you're setup to make that **request**
* And then we can talk about **Upgrades** in **Enterprise, Plugins**, any **other topics** that you'd like us to cover or any that you know off the top of your head that aren't listed here, just let me know ahead.
  + Update the ticket in HI and let me know!
* **These sessions are recorded and are each 2 hours long.**
* **We want to do this soon as possible after the upgrade has been run.**
  + Suggest the day after the upgrade, and then the day after

We do have a suggested **Validation Checklist**, and this contains a *checklist of items* to guide you through the **Validation Process**. This may not all apply or be appropriate for you in your situation, and there may be *additional things* you'd like to validate as well.

**Scheduling the Upgrade Steps**

Taking a look at our *schedule*, by the time we **complete our call** here it will be (***2 HOURS PAST START***), so that will give you a few more hours in your day.

* We could schedule the **Production Upgrade** for Tuesday, 11pm Eastern Time (Kickoff is at 1pm Monday), or
* We could do Wednesday 11pm to give you the extra day to *validate*.
  + What do you think is the *most realistic*?
  + Then, we want to look for a time to schedule the **Best Practice** session.
    - Suggest the day after the upgrade, and then the day after
    - We want to have this done as soon as possible after the upgrade has been run

/////OPTIONAL/////

Because you have familiarity with Update Sets, not worried once on Prod with a sys-admin that has some general SN background. Is there a particular day that works best for you?

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**Customer Process Validation (Slide #9)**

Let me jump into what's involved with the **Validation**.

This would be something that you'd begin with the close of our call today, and continue up until we do the **Production Upgrade.**

We have performed *technical validation* on your **Developer Instance** (which again, is your **cloned Express Production Instance** that we have already upgraded to Enterprise), and we know that whatever we see with the Developer Instance is what we are going to see with our Production Instance because we are performing the same process.

We can be confident that if the Developer Instance is looking good technically, the Production Instance will also. What we need to check now are things that *you* really have the best knowledge about, which is your:

* **Core Data** and your
* **Business Processes**

**I am going to ask you to check different tables in your instance.**

* If you have any custom tables, that the data has *carried over properly*.
  + One way to check that is to verify that the number of records in your **Express Production Instance** table are the same as your new **Developer Instance** table.
* Checking the form itself for multiple tables
  + Making sure that the form looks the same as it does in Express.
  + One form in particular I'll ask you to pay attention to is Incident, and if you have any custom tables.
* There is your Users table, and you may see some extra Demo Users in your Developer instance.
  + You just want to ensure that there are *no fewer users*, and no duplicates in your **Developer Instance** that we're not seeing in Express.
* Companies, Locations, Departments, any new tables like that.
  + Groups and Roles are tables you will want to check.

Our goal here is to make sure that when we perform the Production Upgrade, your fulfillers and end-users will *not* be noticing any **difference**, and that everyone will be able to *do the work* that they expect to do, with everything being *where they expect it*.

With the Roles table, be aware that OOB with Express there are only *5 Roles total*, and we really only primarily use 3 or 4 of them:

* ITIL
* ITIL Admin, and
* Knowledge Role

With Enterprise, I want to say there are about 72 roles OOB and one area in particular is Reporting. If you have any users who use Reporting, whether that is:

* viewing reports
* creating reports
* editing reports **make sure that you impersonate those users** and ensure that *they have access*.

In Enterprise, there are a *number of roles* that all together grant that reporting access (*more granular control*), where as in Express, we only have the **ITIL Role** that is bundled into the Reporting Role.

When carrying over your configuration from Express to Enterprise, it doesn't always know how to properly interpret that **blanket ITIL access** to reporting in terms of the more granular Enterprise Reporting Role options.

* If you see anything like that, let me know and we'll make sure that they get the correct role so they have the right access to the reporting needs they have.

Once you check that your **core data** is there *with integrity*, you want to:

* Impersonate different users
* Different roles
* Impersonate an end-user
  + Create an incident
  + Create a request or a catalog item.
* If you have any order guides, create a request with those.
  + If using order guides doesn't make any sense to you, no worries.
* Then, walk through the entire process:
  + For Example, impersonate a Fufiller and take all the actions a Fufiller would, all the way until the **closure** of an incident or request.
  + When closed, ensure that the end-user's view of that form versus the Fufiller's view,
    - That everyone has the correct access and can see the *proper fields* on those forms based on their **level of access**

Also want to make sure you validate Notifications.

* Any notifications that are hanging during the Upgrade Process will wait in a queue, and then go one-by-one when the Upgrade Process is complete
  + This ensures that your system does not crash upon starting the Enterprise Instance

By default, Notifications are turned off in your Developer Instance. That's not the case with your Production Instance, but with your Developer Instance they are *actually turned off*.

I will include some *instructions* about this, and there is some information included in this Kickoff as well, on how to turn on those email properties so you can validate both:

* Inbound and
* Outbound Notifications, whichever you were using in the past.
  + If you weren't using notifications previously, *no need to validate*!

**Any Questions?**

**Switch to Slide #10**

Do you have an LDAP integration, or Okta, SSO?

Ok, great.

With your Developer Instance, we've generated a new URL, and as of right now you do not have an **Okta** set up for that new URL.

* So, we'll have to use local credentials to do your *validation*
* **IF HELP NEEDED**: If you need help setting this up, it is a little out of scope for this upgrade process, but I'm more than happy to provide you some documentation on getting it set up!

/////OPTIONAL/////

I recommend doing that during your Support Week, we have Day 1 Kickoff and Guided Tour. You complete your validation on Day 2, wait until your Production Instance has been upgraded before setting up any **Okta** logins for your Developer Instance because it's not going to be something that tells us any information setting it up.

* It is not helpful in terms of validation, but I can understand wanting to get it setup, and it be best to do that while you can leverage the support you'll have for those *first five days* after you have upgraded.

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For your Production Instance, there is **no URL change**, so **Okta** is already setup for that Production URL and there will be no change there

* It will continue to function as it has been.

We ask of course during this upgrade process, until we have that Best Practices sesssion, please be sure that whether its in the Developer Instance or Production Instance that there is no *actual configuration* being done. We want to stay away from *configuration* during this time. You'll be still creating records, capturing data, and performing your validations on the Developer Instance, but we ask in both instances that we do not actually do any Development work during this process.

**Any questions so far?**

/////OPTIONAL/////

Because you have familiarity with Update Sets, not worried once on Prod with a sys-admin that has some general SN background. Is there a particular day that works best for you?

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**Future Sys-Admins (Slides #12 + #13)**

These next 2 slides will be talking about some of the *differences* between an instance that is upgraded from Express to Enterprise, and one that is freshly spun out of the box as an Enterprise Instance.

* *Functionality wise*, they have all the same functionality, the purpose of these slides is just to:
  + View the entire Express to Enterprise Upgrade Process
  + To enable the carryover of your Express functionality, configuration, and data
    - And do it in a way that is smooth and non-destructive to your end-users and fufillers,
    - To show that we have *some differences* under the hood.
* This is something that, if you're working with a ServiceNow developer that may have *years of experience* with the Enterprise platform, but sometimes the *more experience* that a ServiceNow Developer may have with Enterprise, the less experience they have with Express, so it's important to share this information with them so they're not confused or surprised when they look at your upgraded instances and see these differences under the hood.

**What are those differences?**

First and foremost, for your end-users and fufillers they are going to experience the same functionality. It will take a **VERY** observant end-user or fufiller to really notice that there's been a difference.

**Slides #14 and #15 highlight the visual differences**

* To show you *what I mean*, here's a snapshot of Admin View in an Express Instance, and here's the same instance after it's been Upgraded to Enterprise.
* Someone who is **super observant** may notice that the size of the logo and banner are slightly smaller in Enterprise, and there is slightly different shadowing on the tiles in the dashboard.
* Again, there wil be *very little visual difference* between the two instances.

As a System Admin, you'll see once we're in your instance that there are a lot of *differences* in your new instance.

1. You'll see there are way more options, more applications, available to you in Enterprise versus what was available in Express. Don't feel overwhelmed as that is a common feeling, you are not expected to know every single application inside and out.

* ((There are very, very few ServiceNow developers that know all these applications at an expert level.))

**Plugins (Slide #13)**

To get into *little more detail* on what those differences are, one of them is that there are a number of Plugins.

Are you familiar with the concept of Plugins?

* You may have seen them before
  + They are pretty quick and easy ways activate a whole set of features
  + Some plugins are free, and some do have a cost associated with them.
* Once *activated*, they cannot be **deactivated**.
* With a freshly spun up instance, there are a number of plugins that are *activated by default*.
  + However, *in your particular case*, because we are upgrading your Express Instance to Enterprise, there are going to be a *number of plugins* that would have been activated in a freshly spun up instance that are not *currently* activated.
  + They're there, you can activate them if you ever want to, but *by default* they are de-activated.

There is a list of *these Plugins* in this Upgrade Guide, which I also included when I reached out to you via the HI Service Portal.

* I strongly recommend that you take a look and read through this upgrade guide
  + It has a lot of helpful information in there, including this *list of plugins* (about 30) that will be inactive *in your instance by default*.
  + We also strongly recommend that you activate these plugins one by one, instead of all at once, so you can kind of see what the differences are and **ensure** your instance will function the way you intend it to
* Of course, if you're working with a Service Partner, they may be comfortable doing it differently, but our recommendation is activating these new plugins one-by-one, and only as-needed.

**Any questions?**

Again, once plugins are active, they cannot be *de-activated*.

* The upgrade guide shows which plugins will have a fee associated with them.
  + If you have any doubt about costs associated with plugins, please reach out to your Sales Rep, as they will have that information for you most accurate and sooner than anyone else.
* Sometimes if there is a fee associated with a plugin, you may have already paid that fee as a part of a bundle or something else, you just want to ***confirm*** that again with your Sales Rep.

Some other differences are that some modules will retain their Express name, rather than adopt their Enterprise name. **Example**:

* In Express, we have the module Catalog Items under our Service Catalog Application
* In Enterprise, the module Catalog Items is by default called Maintain Items, but in your *upgraded instance* the naming **does NOT change**.
  + This may confuse a system admin who does not have prior exprience with Express instances, but they still should be able to find many of the modules pretty quickly.

*Another difference* is **ACLs**

* How we control *access* to certain areas of the instance
  + Whether it be fields and the data contained inside of those fields
  + Or even entire tables
* Those **ACLs** in your instance will look a little different than from a freshly-spun-up Enterprise instance, again we want to retain that Express experience so that your fufillers and end-users have as smooth of a transition to Enterprise as possible.
* Likewise, we're carrying over *Express* features and those continue to be what your instance runs on, instead of just jumping straight into Enterprise, as there is some setup required, which we'll be touching on later today.

Your instance will still be running on **Execution Plans** and **Approval Rules**, which are unique to Express (at least Approval Rules are)

* But now you have that option
  + When you are at a *pace* that is appropriate for you (no pressure from a particular timeline), you can start shutting down *Execution Plans* and *Approval Rules* and start shifting over to *Workflows* instead.

**Do you currently have items in your Service Catalog, and are you currently using a Service Catalog at all?**

yes.

**Ok, that's probably somnething you'll want to take a look at with your Service Partner.**

* Especially because sometimes in Express where it makes sense to create what's called a Record Producer, it's not necessarily the case in Enterprise.
  + You'll want to have the *review with them*, where they can come in and say "Oh, well you might be better off with an *Order Guide*" for example, depending on the situation.
* Revisiting what your original business goals were can be very helpful, there are so many limitations that Express imposes upon us whether that's through the Service Catalog or the Change Form (that's another big area), and we often *compromise* on our requirements to make it work, so now is a *great opportunity* to *revisit* these things!
* With your Service Partner or just yourself too, to ensure whatever you're **building out** will give you the full functionality available to you with the Enterprise platform and set you up for *long-term success* down the road.

**Slide #16 for Express to ITSM Upgrade Guide Link**

We also have some *documentation* too provided by ServiceNow where they cover the *Express to ITSM Upgrade* through this guide here, so I do recommend that you take a look at this and share this with your Service Partner (if you end up utilizing one).

**Do you have any questions on anything that we've covered so far?**

**We're almost done with this portion of the presentation!**

**Contacting Remote Services ()**

Some basic info here:

* The Remote Services Department is open *Monday through Friday*, 9-5
* 9-5 can get a little blurry working across *multiple time zones*, but the idea being that we are working 8 hours a day.
  + If it's a *really urgent emergency*, there is the *HI Service Portal*, there is the **request escalation button** on your ticket, but by and large there may be a little time between when you reach out to us and when we're able to respond.
  + I am aware of what stage you're at in the process, and knowing that you're entering the Validation Process, I am going to be keeping a *closer eye* on your ticket than I would be otherwise.

Please be sure if you're reaching out to me to get in contact, that it's either through the *HI Service Portal* or by replying to one of the notifications generated from the tickets within the *HI Service Portal*.

* If you try to reach me by *email*, it most likely will *NOT be successful* unfortunately as I am constantly receiving a lot of automated emails and things easily get lost in there versus when I go into HI and am actively monitoring the tickets myself.
* The *other reason* is because we want these tickets to have as many conversations on them as possible as a record of truth, which can then be referred to later on
  + In the case down the road you create an Incident and that Incident is in some way tied to your upgrade, there are records of everything that had happened throughout that upgrade process.

**Any questions?**

You may have seen a Change Record that was created.

* Again, don't reach out to me on that **Change Record** as I won't see it.
* Likewise, be sure if possible to *reach out to me first* if you run into anything unexpected during the validation process
  + It could just be a knowledge transfer issue, it could be something very simple like ensuring the *proper role* is granted to a user, or it could be something more complex that requires an incident to be created.
  + If that's the case, I would go ahead and create that incident for you.
  + That way, I *personally* can assure that it's getting the proper attention for being an Upgraded Incident that it should have.

If at any point you feel in any way confused, uncomfortable, anything less than 100% Satisfied or Comfortable, **please let me know**.

* I am more than happy to:
  + Adjust my *approach*
  + Hop on a *quick call*
  + Change how I'm doing things to ensure that you know what is going on and are on the same page with me.
* If for *any reason* that you're not comfortable reaching out to me, you can always reach out to my manager Juliet Acuff @ servicenow.com, I would just ask that you copy [remoteservices@servicenow.com](mailto:remoteservices@servicenow.com) on that communication as well

We do have a *customer feedback program*.

* You should get a survey a few weeks after your upgrade process has been complete, and we do like to hear good news as much as room for improvement!
  + I point that out because *sometimes* there are calls to change things, and if we hear things where customers *like how we approach a certain aspect* of the process, sometimes those comments are just as valuable as when we do need to go ahead and change something.

**Any questions on anything we've covered so far in this presentation?**

* Go over scheduling again, when they will be offline.

For this next portion, I am going to stop sharing my screen, and turn it over to you.

* I will be sending you your Dev Instance URL in the meeting's chat, and I ask that you navigate to that URL and share your screen so we can begin the second portion of our call today.