

How do I perform ServiceNow upgrades?

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If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please [contact us](#).

It's important to stay on the current ServiceNow® release so you can take full advantage of the new products and capabilities as they're released *and* so you maintain the highest levels of security, availability, and performance.

How often should I upgrade?

- The [ServiceNow upgrade policy](#) states that we provide support for the two most recent release families—the current release and one release behind the current. This means you need to upgrade at least once a year to stay current. Once you fall behind the supported versions, ServiceNow will schedule an upgrade for you.
- There are two major releases each year, typically in March and September. Determine your upgrade plan (once or twice a year) and [plan ahead](#).

What is the value of staying current?

By consistently performing upgrades to the Now Platform®, the potential benefits you can expect include:



Achieve business value faster

Increase workflow efficiency by **up to 25%***



Bring new capabilities to market faster

Get faster access to new features, reducing time spent on build-outs and developments by **as much as 80%***



Improves platform performance and the upgrade process

Reduce the time spent on upgrades by **as much as 81%***

Visit the [ServiceNow Value Calculator](#) to determine the value for your organization based on your unique inputs.

*The Total Economic Impact™ Of Staying Current With ServiceNow Upgrades, a commissioned study conducted by Forrester Consulting, August 2020.

How do I perform ServiceNow upgrades? (Continued)

What is the upgrade process?

Phase 1: Plan

[Read the release notes and plan your upgrade](#)

- Read the [release notes](#) to understand the required upgrade and migration tasks.
- Complete the preparation and planning tasks in Phase 2 of the [upgrade planning checklist \(Paris\)](#).
- Evaluate the level of customization on your instances.
- Create a comprehensive test plan.



Phase 2: Prepare

[Prepare for the development instance upgrade](#)

- Create a system clone of your production instance so you'll be able to simulate an upgrade on your production configuration in a non-production environment.

Phase 3: Schedule upgrade

[Verify your upgrade configurations and schedule the development instance upgrade in HI](#)

- Follow steps in the [upgrade planning checklist](#) to set up your instance for the upgrade and then schedule your upgrade in HI.

Phase 4: Review upgrade

[Upgrade and validate the development instance](#)

- Track the progress of your upgrades with the [Upgrade Monitor](#).
- Use the Upgrade Monitor to [process the skipped list of records](#) that were not addressed in the upgrade.
- Gather the update sets needed to address skipped records, changes to configurations needed for the upgrade, and items that must go live immediately after the upgrade. Then, perform functional testing.

Phase 5: Test and validate

[Upgrade and validate your other non-production instance\(s\), such as your test instance](#)

- Configure and refine your development instance.
- Upgrade other sub-production instance(s) you have in your development to production stack.
- Configure your test environment to be a good representation of your production environment.

Phase 6: Remediate

[Prepare to upgrade the production instance](#)

- Review and fix issues discovered during testing.
- Communicate the upgrade to stakeholders and consumers.



Phase 7: Production upgrade

[Upgrade the production instance](#)

- After validating that your upgrade was complete, apply update sets and fix scripts.
- Perform post-upgrade user acceptance testing.
- Hold a retrospective review to identify what worked well and what you can improve next time.

Sub-production instances

How do I perform ServiceNow upgrades? (Continued)

How can I speed up testing?

- [Automated Test Framework \(ATF\)](#) is a native Now Platform application to [create and run automated testing](#). ATF helps you complete upgrades faster by automating slow, complex, resource-intensive manual testing. When you upgrade, run ATF tests to confirm that the instance still works as designed.
- [Jumpstart Your Upgrade](#) is a service that ServiceNow offers to customers who would like to do a dry run of an upgrade in a demo environment. It's a great way to work out some of the kinks before you start the real upgrade.

Where can I find additional content to help me upgrade?

Best practices

- [Success Playbook – Perform ServiceNow upgrades quicker and more effectively](#)
- [Success Checklist – Plan for upgrades at least once a year](#)
- [Instance Upgrades – Accelerate your instance upgrades](#)

Product documentation

- [Paris release notes](#)
- [Upgrade your instance](#)
- [Upgrade planning checklist \(Paris\)](#)

Community support

- [Now Creators](#)
- [Upgrade Community](#)