How do I perform ServiceNow upgrades?

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%*

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

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.
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.
- 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 NowSupport

- Follow steps in the upgrade planning checklist to set up your instance for the upgrade and then schedule your upgrade in Now Support.

**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.
How can I simplify upgrades?

- **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 Workbook – Perform ServiceNow upgrades quicker and more effectively**
- **Instance Upgrades – Accelerate your instance upgrades**

**Product documentation**
- **Release notes**
- **Upgrade your instance**
- **Upgrade planning checklist**

**Now Support**
- **Schedule Upgrades**
- **Early Release registration**
- **Upgrade Assist registration**

**Community support**
- **Upgrade Community**
- **Now Creators**

Use the **Upgrade Kit** to get started.