



Upgrading with Confidence

Credit Suisse is a leading global private bank and wealth manager with distinctive investment banking capabilities. They have their headquarters in Zurich, Switzerland, and have operations in over 50 countries.

The Problem

Credit Suisse had been a Perspectium Observer customer for some time, and were using that tool to manage and monitor the performance of their ServiceNow instances. But as they approached their ServiceNow Fuji upgrade, they were nervous. They couldn't just take ServiceNow offline during the upgrade - and wanted to be sure that they wouldn't lose any incidents or CIs that were created while the upgrade process was underway.

Before starting an upgrade, ServiceNow performs a full backup of the instance so that the upgrade can be reverted if needed - but what would happen to records that were created between when this backup was created, and when the production instance was reverted? The solution that they used was a unique use case for Perspectium Replicator.

The Solution

Before commencing the upgrade, Credit Suisse set up a dynamic share using Replicator. They were "publishing" records to the message broker service - effectively using the service to store all the records as they were created. As the message broker service does not destroy the records, they had effectively created a live backup of every record that was created or updated since the upgrade commenced. It was similar to the "Time Machine" functionality that Apple includes in MacOS.

Had the upgrade been unsuccessful, Credit Suisse could have reverted to their ServiceNow instance backup, taken prior to the upgrade window. They would have then been able to "subscribe" to the records pushed to the message broker service and recover all the data their users created during the failed upgrade window.

The Payoff

If Credit Suisse had not used Perspectium Replicator, their only other course of action would have been to export all of the records created or modified since the upgrade commenced, and re-import them into the reverted instance. This would have been a very manual process - with Credit Suisse having to do this for every table that had any changes - and would have completely messed up the audit logs, meaning that things like approvals would be recorded incorrectly.

However, with the Perspectium Replicator safeguard in place, Credit Suisse had peace of mind in proceeding with their upgrade. Best of all, Credit Suisse plan to make Replicator a standard part of their ServiceNow upgrade process in the future.