



# The “Time Machine”

## Upgrading with Confidence at a Financial Services Enterprise

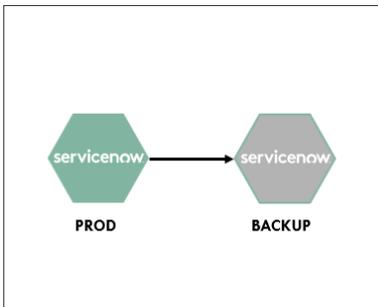
A leading global private bank and wealth manager needed to ensure that the latest updates to ServiceNow data were included in a backup, should a ServiceNow upgrade fail and the production instance need to be reverted to the previous version.

### The Problem

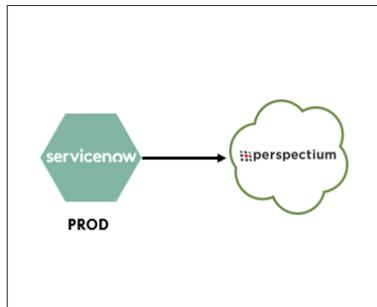
As a multinational financial services company approached their ServiceNow upgrade, they were nervous. They couldn't just take ServiceNow offline during the upgrade - and wanted to be sure that they wouldn't lose any incidents or CIs that were created while the upgrade process was underway. Before starting 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

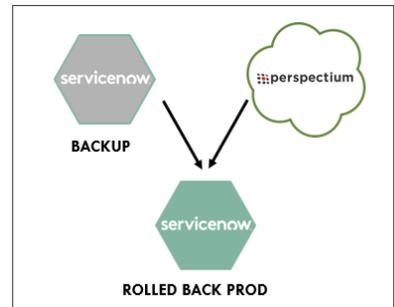
Before commencing the upgrade, they set up a dynamic share using Perspectium. They were “publishing” records to the message broker service – in effect, using the service to store all the records as they were created. As the message broker service does not destroy the records, they had effectively created 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.



ServiceNow creates backup and commences upgrade



All new/updated records are replicated to Perspectium cloud



If rollback is needed, backup is source together with records from Perspectium cloud

Had the upgrade been unsuccessful, they 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 the banking company had not used Perspectium, 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 the company 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 integration safeguard in place, the company had peace of mind in proceeding with their upgrade.