

Phase – 1: Requirement Analysis & Planning

1. Modules & Task Reference

This phase focuses on understanding business requirements, identifying stakeholders, and planning the execution approach for automating the **Software Installation Request** process using ServiceNow.

Modules covered in Phase 1:

- Business Objective Definition
- Stakeholder Identification and Mapping
- Service Catalog Planning
- Workflow Design Planning
- Table Identification and Data Flow Analysis
- Execution Roadmap and Deployment Planning

This phase acts as the **foundation** for all subsequent implementation activities.

2. Objective

The objective of Phase 1 is to clearly define **what needs to be automated, why it is required, and how it will be executed** using ServiceNow best practices.

This phase ensures:

- Alignment between business needs and technical implementation
 - Clear understanding of roles, responsibilities, and expectations
 - Well-defined execution plan to avoid rework and misconfiguration
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3. Business Requirement

Organizations often face delays, manual coordination issues, and lack of visibility when handling software installation requests.

The business requires a **standardized, automated, and transparent mechanism** to manage software requests efficiently.

Key requirements include:

- Centralized request submission through Service Catalog

- Automated approval based on organizational policies
- Structured task creation for IT fulfillment teams
- License compliance validation
- End-to-end tracking of request status

3.1. Business Objectives

The business objective for **Software Installation Request Automation** in ServiceNow is to improve efficiency, reduce manual effort, and enhance user satisfaction.

The solution aims to:

- Streamline and automate the end-to-end lifecycle of software installation requests
- Reduce manual effort and eliminate delays in request handling
- Accelerate approval and fulfillment timelines
- Enforce standardized workflows and approval processes
- Improve request visibility and tracking using a centralized platform
- Enhance end-user experience with faster and transparent service delivery
- Ensure compliance with licensing, IT governance, and security policies

3.2. Stakeholder Mapping

Stakeholder	Role	Needs / Expectations	Impact Of Automation
End Users (Requesters)	Employees requesting software	Easy request submission, quick approvals, status visibility	Faster software access, transparent tracking
IT Support / Fulfillment Team	Install software on devices	Clear request data, automated task assignment	Standardized intake, reduced errors, time saved
Approvers (Managers / Security Officers)	Validate compliance	Policy enforcement, structured approvals	Automated routing, better audit trails
ServiceNow Admins	Configure catalog and workflows	Flexible, scalable automation	Easier maintenance, configurable workflows

3.3. Execution Roadmap

1. Update Sets

Objective: Capture, manage, and migrate configurations safely.

- Define scope of changes (flows, business rules, catalog items)
- Create and use a dedicated Update Set

- Ensure alignment with deployment governance

2. Service Catalog Design

Objective: Provide a user-friendly request interface.

- Identify service request categories
- Create catalog item with clear description
- Design structured variables for request capture

3. Workflow Design & Planning

Objective: Define automation flow.

- Identify approval and fulfillment steps
- Define decision points and exception handling
- Align workflow with ITSM best practices

4. Attach Flow to Catalog Item

Objective: Trigger automation on request submission.

- Link the flow to the Software Installation catalog item
- Ensure only one active process engine is attached

5. Requirement Analysis & Table Identification

Objective: Identify backend data flow.

- sc_request (REQ) – Request level
- sc_req_item (RITM) – Item level
- sc_task (SCTASK) – Fulfillment tasks

6. Table Handling

Objective: Map business data to tables.

- Define relationships (REQ → RITM → SCTASK)
- Map fields like requester, approval status, tasks

7. Testing & Validation

Objective: Ensure end-to-end functionality.

- Test request submission and approvals
- Validate task creation and assignment
- Verify notifications and rejection handling

9. Deployment

Objective: Move solution to production.

- Capture all changes in Update Sets
- Deploy across environments
- Train users and IT teams
- Maintain documentation

4. Outcome

At the end of Phase 1:

- Business requirements are clearly documented
- Stakeholders and responsibilities are identified
- Execution roadmap is finalized
- Technical foundation is established for implementation

This phase ensures the project proceeds with **clarity, structure, and minimal risk**, enabling smooth implementation in subsequent phases.