



Phase – 1: Requirement Analysis & Planning

Functional Scope

Description

The functional scope of the **Software Installation Request Automation** project defines the key capabilities and features implemented within the ServiceNow platform to automate and manage licensed software installation requests. This phase focuses on clearly identifying the functionalities required to handle the complete lifecycle of a software request, starting from request submission through approvals, fulfillment, and final closure.

The scope emphasizes standardization, automation, and transparency across all stages of the request process. By leveraging ServiceNow's native components such as the Service Catalog, Flow Designer, approval engine, task management framework, and notification system, the solution ensures efficient handling of software requests while maintaining compliance with licensing, IT governance, and security policies.

In-Scope Functionalities

1. Service Catalog Item Creation

A dedicated **Software Installation Request** catalog item is created within the ServiceNow Service Catalog and made available through the Service Portal. This catalog item serves as a centralized and standardized entry point for employees to request licensed software installations.

Clear descriptions and instructions are provided within the catalog item to guide users during request submission, reducing incorrect or incomplete requests and improving overall request quality.

2. Form Design and Variable Configuration

Dynamic catalog forms are designed using variables to capture essential information such as software name, version, license type, and business justification. Mandatory fields ensure that all required details are collected before submission.

UI Policies and Client Scripts are applied to control field visibility, enforce validations, and auto-populate user or system-related data where applicable. This improves usability, reduces manual input, and minimizes errors during request creation.

3. Approval Routing

Automated approval workflows are configured to route software installation requests to the appropriate approvers, such as managers or the Software Asset Management team. Approval paths can vary based on license type, software category, or organizational policies.

This structured approval process ensures proper authorization, enforces compliance with licensing and security requirements, and eliminates delays associated with manual approval coordination.

4. Flow Designer Automation

End-to-end automation of the request lifecycle is implemented using ServiceNow Flow Designer. The flow triggers automatically upon catalog item submission and manages actions such as initiating approvals, updating request states, generating fulfillment tasks, and maintaining backend records.

The automation logic is designed to be modular and scalable, enabling future enhancements or additional approval conditions without major rework.

5. Task Creation and Request Tracking

Fulfillment tasks are automatically created and assigned to the appropriate IT Software Support or Asset Management teams after approvals are completed. Each task includes relevant request details to ensure clarity and reduce follow-up communication.

Both requesters and IT teams can track the status of requests in real time. Requesters gain visibility into approval and fulfillment stages through the Service Portal, while administrators and support teams can monitor active and pending requests.

6. Email Notifications

Automated email notifications are configured to keep stakeholders informed at critical stages of the request lifecycle. Notifications are sent to requesters upon submission, approval, rejection, and completion of the software installation.

Approvers and fulfillment teams also receive alerts when action is required, ensuring timely responses and improving overall communication and transparency.

Out-of-Scope Items

The following functionalities are considered out of scope for **Phase-1** and may be addressed in future phases:

- Integration with external software deployment or license management tools
 - Advanced analytics and reporting dashboards for software usage
 - AI-driven software recommendations or predictive approvals
 - Fully automated software installation without manual IT validation
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Outcome

The defined functional scope establishes a structured and scalable foundation for automating software installation requests within ServiceNow. By standardizing request intake, automating approvals and fulfillment workflows, and enhancing communication through notifications, the solution significantly reduces manual effort and processing time. This approach ensures improved governance, better visibility, and a consistent user experience while enabling future expansion and advanced automation capabilities.