📄 Phase 5: Deployment, Documentation & Final Presentation

Document Setup Manual

Description

The Setup Manual provides a step-by-step guide to recreate the **Software Installation Request** solution in a new **ServiceNow Personal Developer Instance (PDI)**. This document ensures that administrators or developers can reimplement the solution consistently by following a defined order of operations, supported by screenshots for clarity.

Prerequisites

Before starting the setup:

- Access to a ServiceNow Personal Developer Instance (PDI)
- System Administrator role
- Basic understanding of ServiceNow Service Catalog and Flow Designer

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Step 1: Create Update Set

Objective
To capture all configurations related to the project.

Steps

Navigate to:

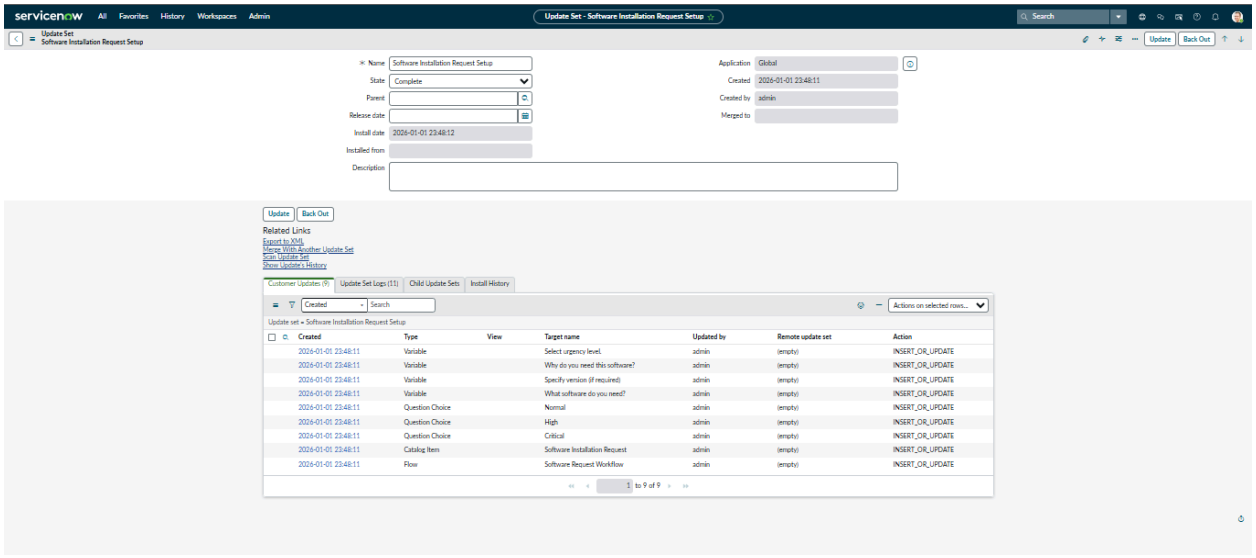
`System Update Sets → Local Update Sets`

1.

2. Click **New**.
3. Enter:
    - **Name**: Software Installation Request Setup
    - **State**: In Progress
4. Click **Submit**.
5. Set the update set as **Current**.

📸 Screenshot Evidence – Update Set Creation

Insert screenshot showing the Update Set created and marked as Current.



Step 2: Create Service Catalog Item

Objective

To define the Software Installation Request entry point for users.

Steps

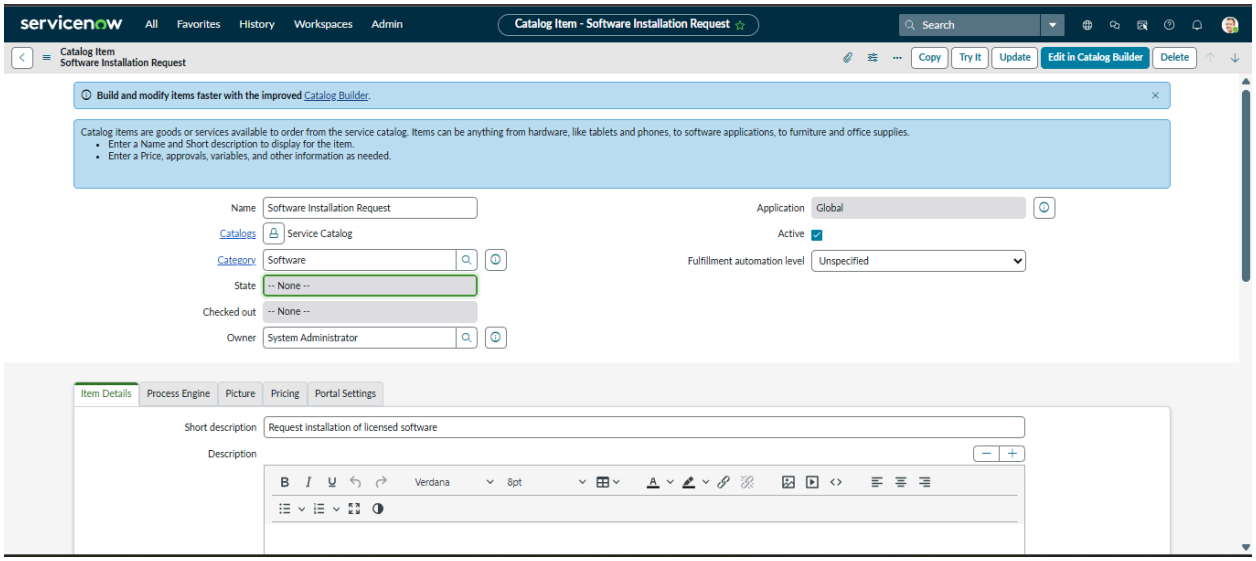
Navigate to:

`Service Catalog → Catalog Definitions → Maintain Items`

1.
2. Click **New**.
3. Fill in:
    - **Name**: Software Installation Request
    - **Catalog**: Service Catalog
    - **Category**: Software
    - **Short Description**: Request installation of licensed software
    - **Active**: Checked
4. Save the record.

📸 **Screenshot Evidence – Catalog Item Creation**

Insert screenshot showing the Software Installation Request catalog item form.



Step 3: Configure Catalog Variables

Objective

To capture required input from users.

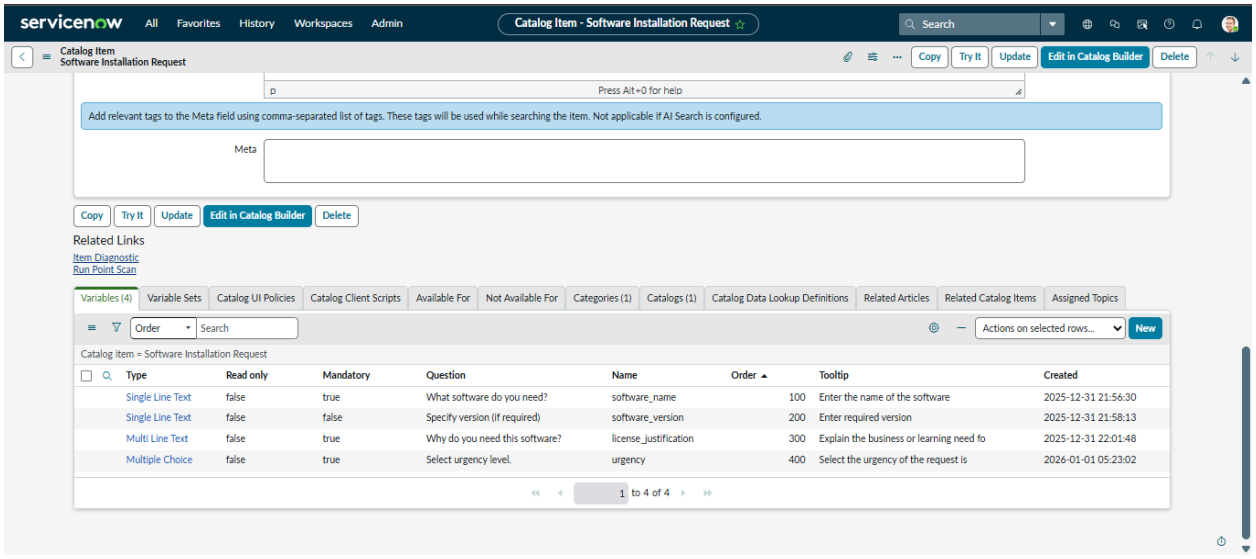
Variables Configured

- **Software Name** (Single Line Text)
- **Version Required** (Single Line Text)
- **License Justification** (Multi Line Text)
- **Urgency** (Choice: Normal, High, Critical)

Steps

1. Open the catalog item.
2. Scroll to **Variables**.
3. Click **New** for each variable.
4. Configure mandatory settings and save.

📸 **Screenshot Evidence – Variable Configuration**
Insert screenshot showing the list of configured variables.



Step 4: Workflow / Flow Designer Configuration

Objective

To automate approvals and fulfillment.

Steps

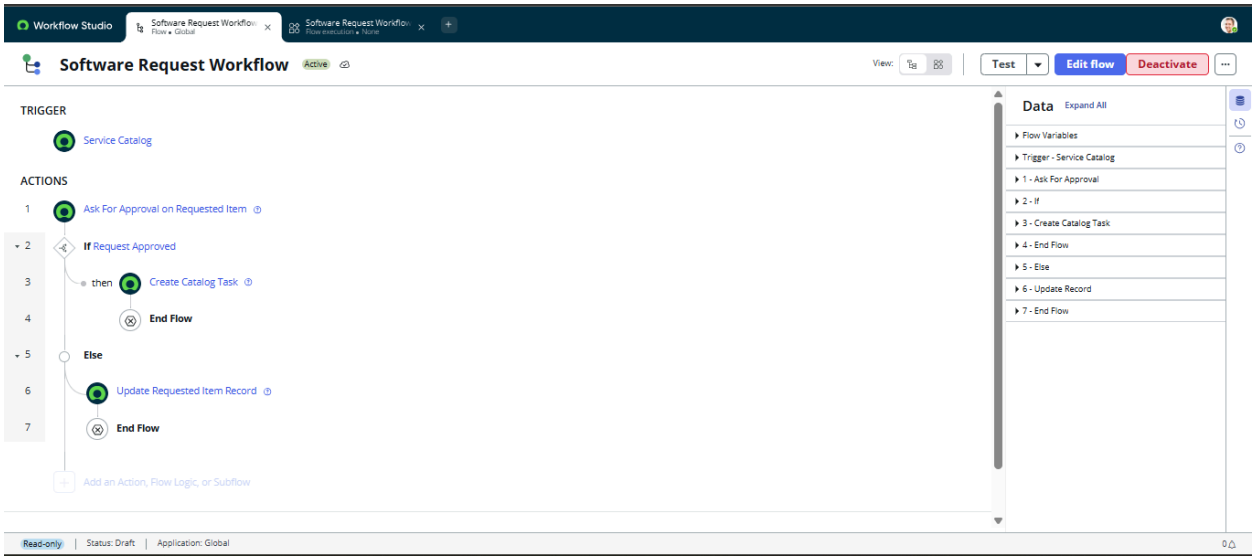
Navigate to:

`Flow Designer`

1.
2. Create a new flow:
    - **Name**: Software Request Workflow
3. Configure:
    - Trigger: Service Catalog submission
    - Approval action
    - Conditional logic
    - Create Catalog Task action
    - End flow paths
4. Save and activate the flow.

📸 **Screenshot Evidence – Flow Designer Setup**

Insert screenshot showing the Flow Designer canvas.



Step 5: Attach Flow to Catalog Item

Objective

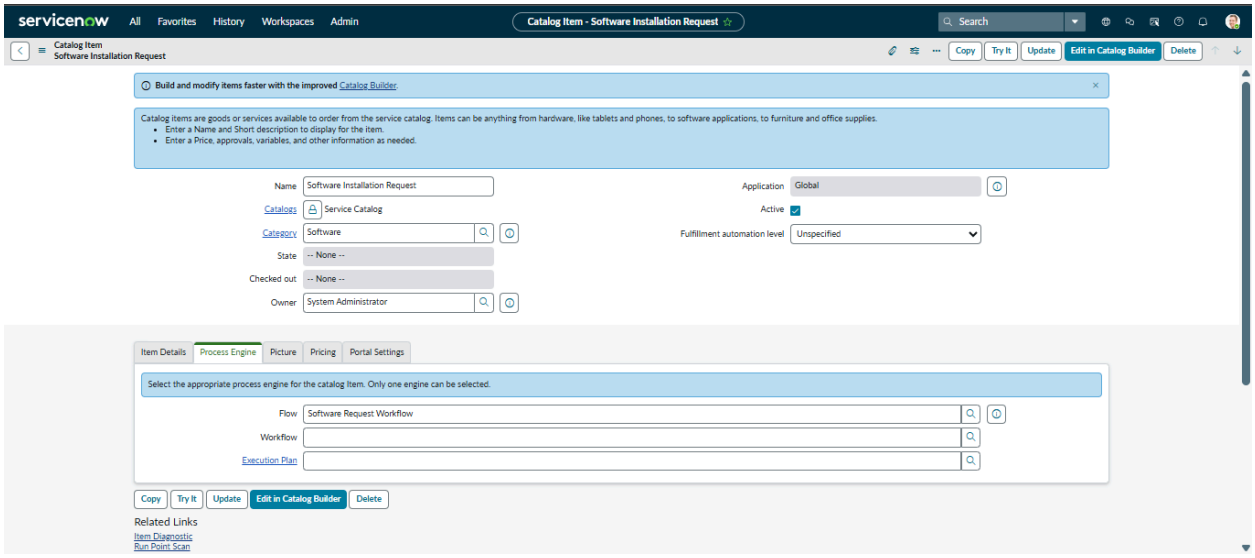
To ensure the catalog item triggers the automation.

Steps

1. Open **Software Installation Request** catalog item.
2. Scroll to **Process Engine**.
3. Select **Software Request Workflow**.
4. Save the record.

📸 Screenshot Evidence – Workflow Attachment

Insert screenshot showing the workflow attached to the catalog item.



Step 6: Requirement Analysis & Table Verification

Objective

To validate backend data creation.

Tables Verified

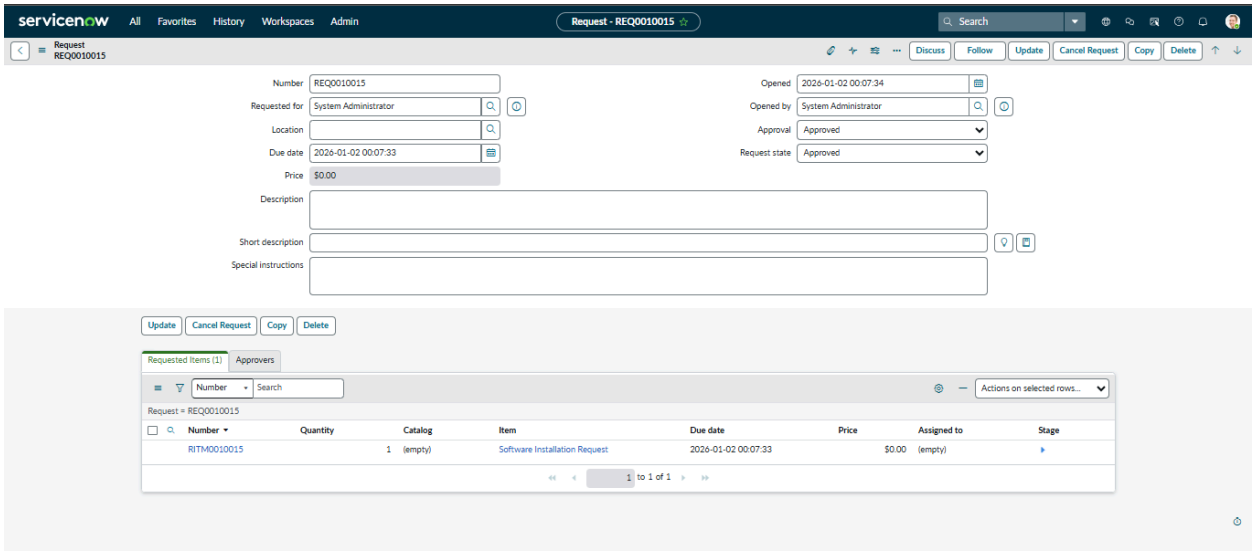
- sc_request (REQ)
- sc_req_item (RITM)
- sc_task (SCTASK)

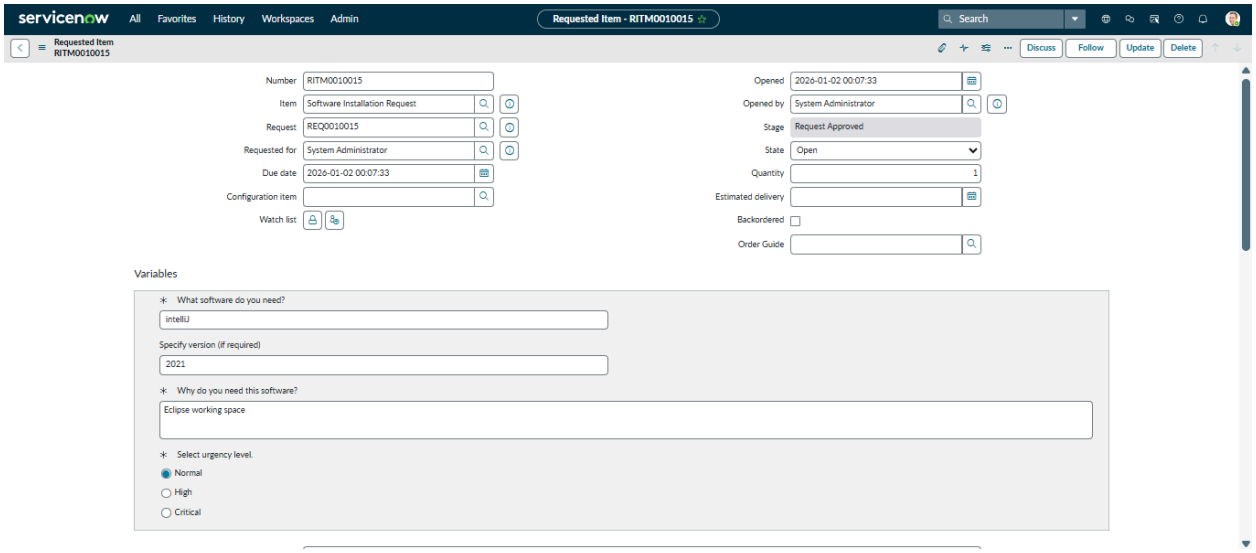
Steps

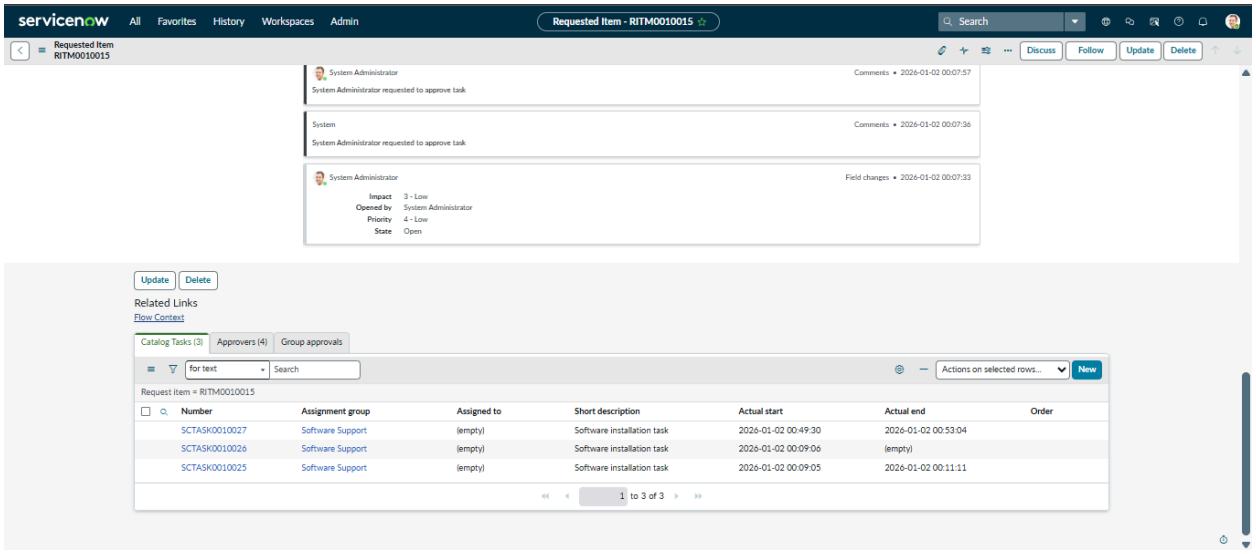
1. Submit a test request.
2. Verify:
    - REQ creation
    - RITM creation with variables
    - SCTASK creation after approval

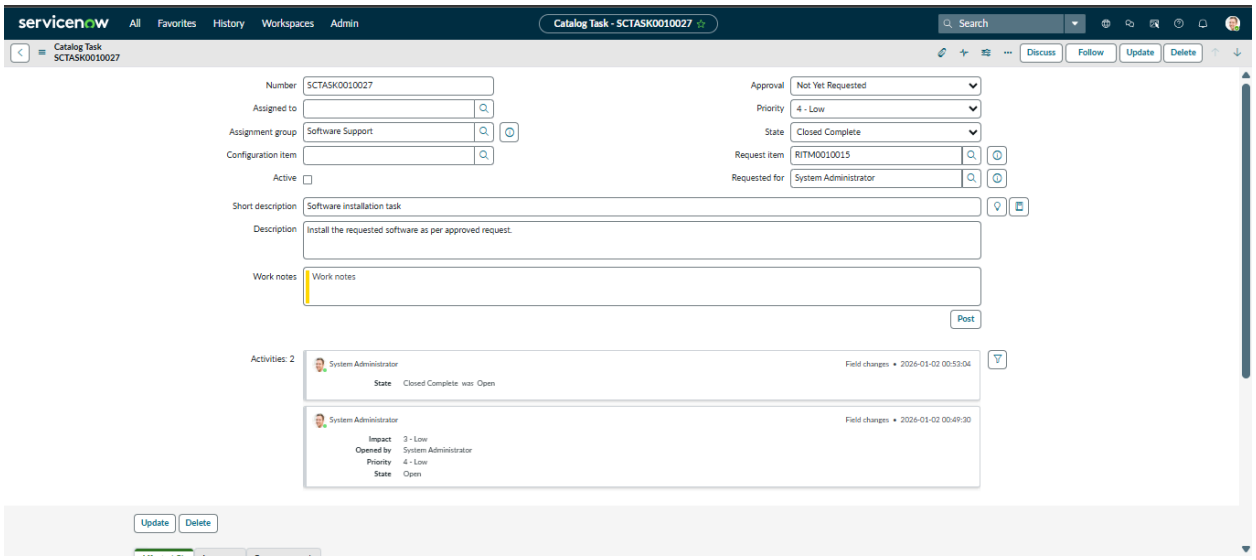
📸 Screenshot Evidence – Backend Table Verification

Insert screenshot showing linked REQ → RITM → SCTASK.









Step 7: Test Submission & Validation

Objective

To validate end-to-end functionality.

Steps

Navigate to:

`Service Portal (/sp)`

1.
2. Submit a Software Installation Request.

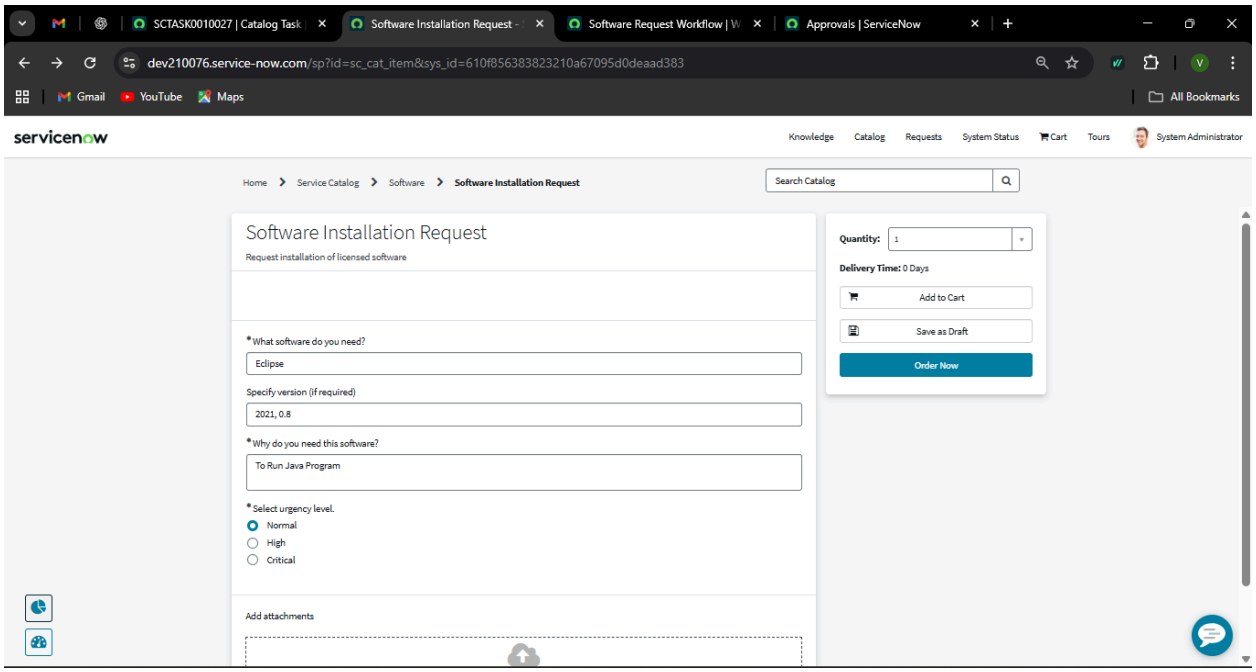
3. Approve the request.

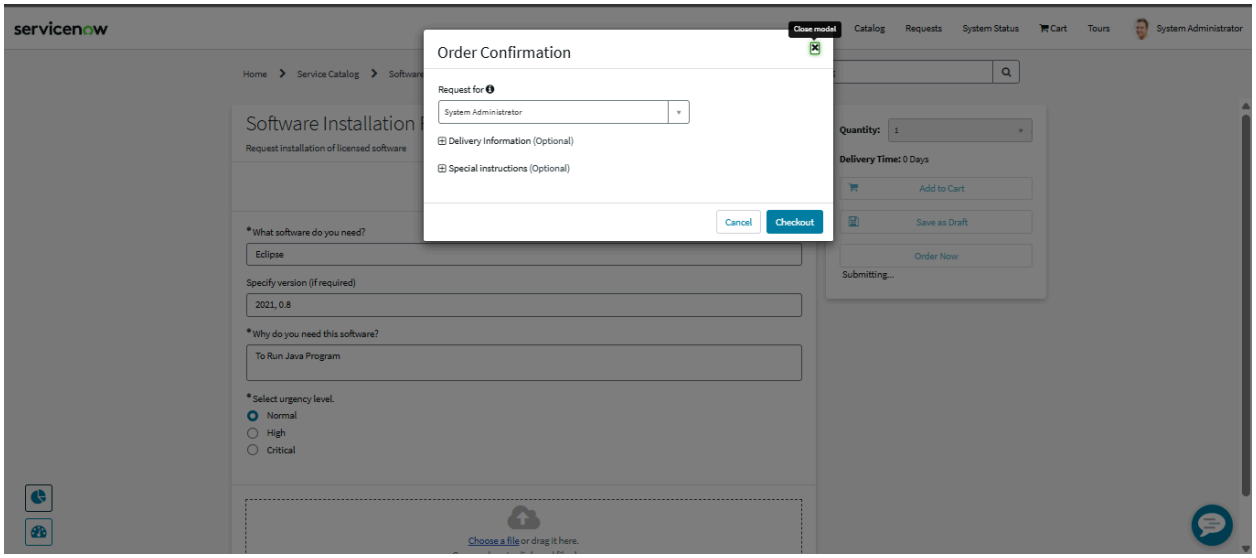
4. Complete the catalog task.

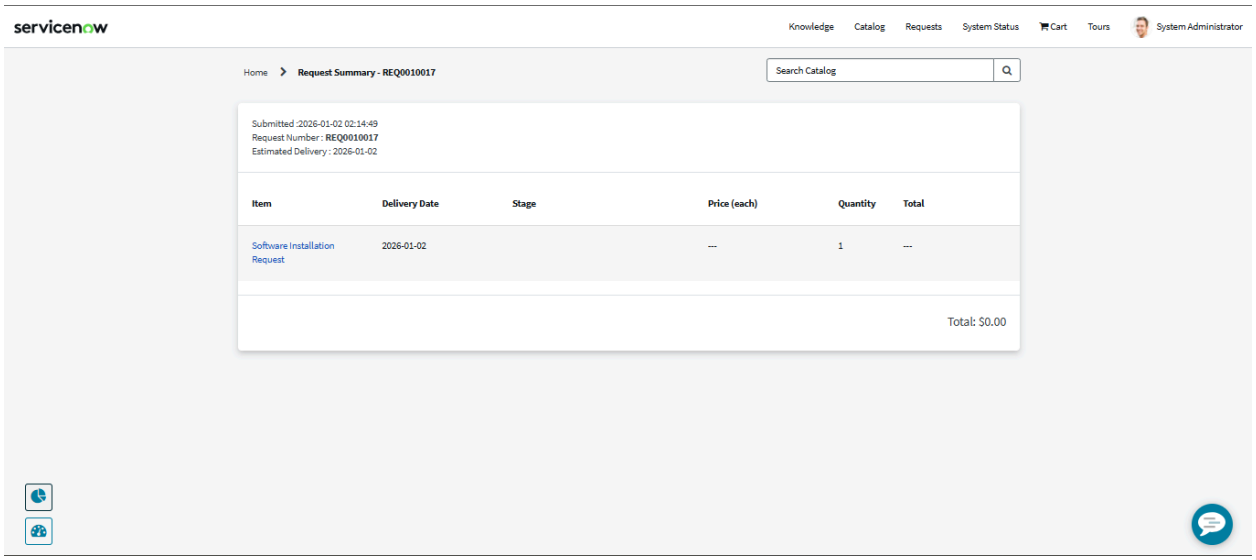
5. Confirm RITM closure.

📸 **Screenshot Evidence – Test Execution**
Insert screenshot showing successful request completion.

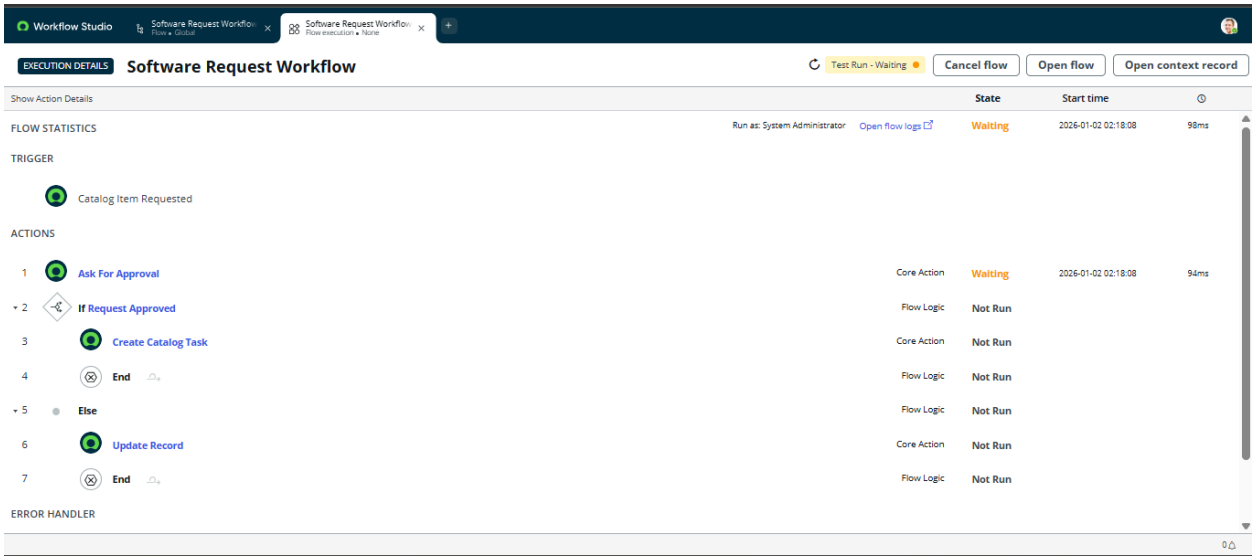
1.) Submit a Software Installation Request :

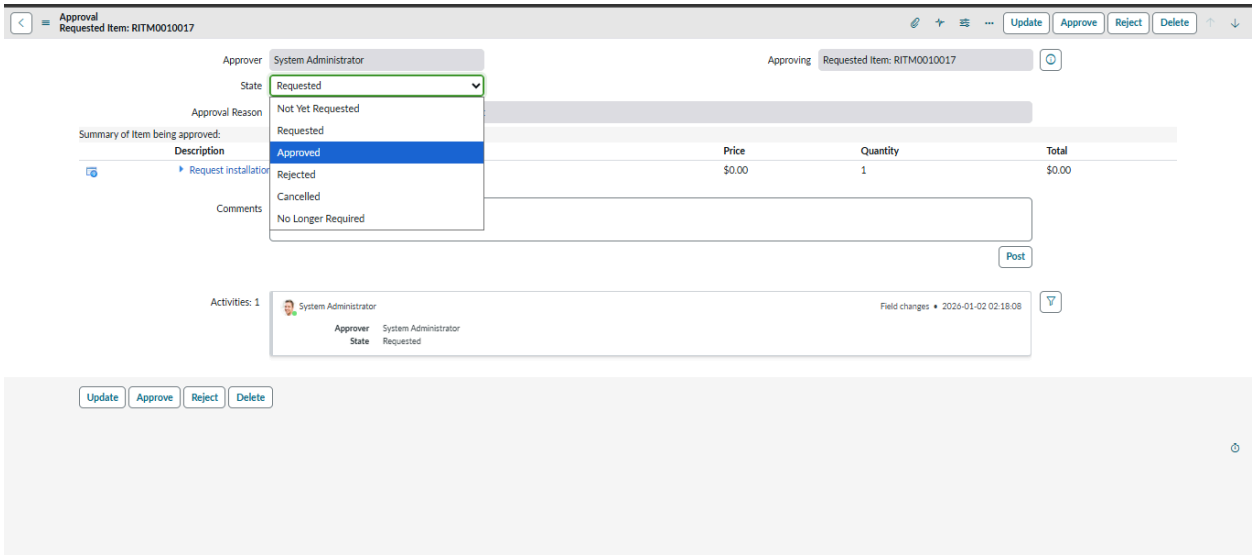




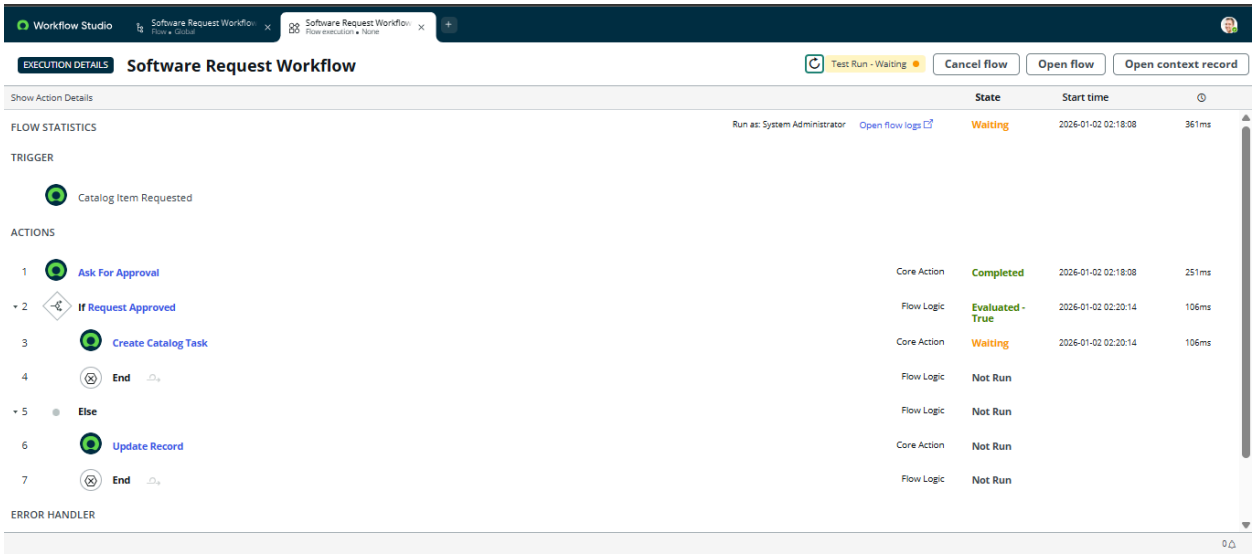


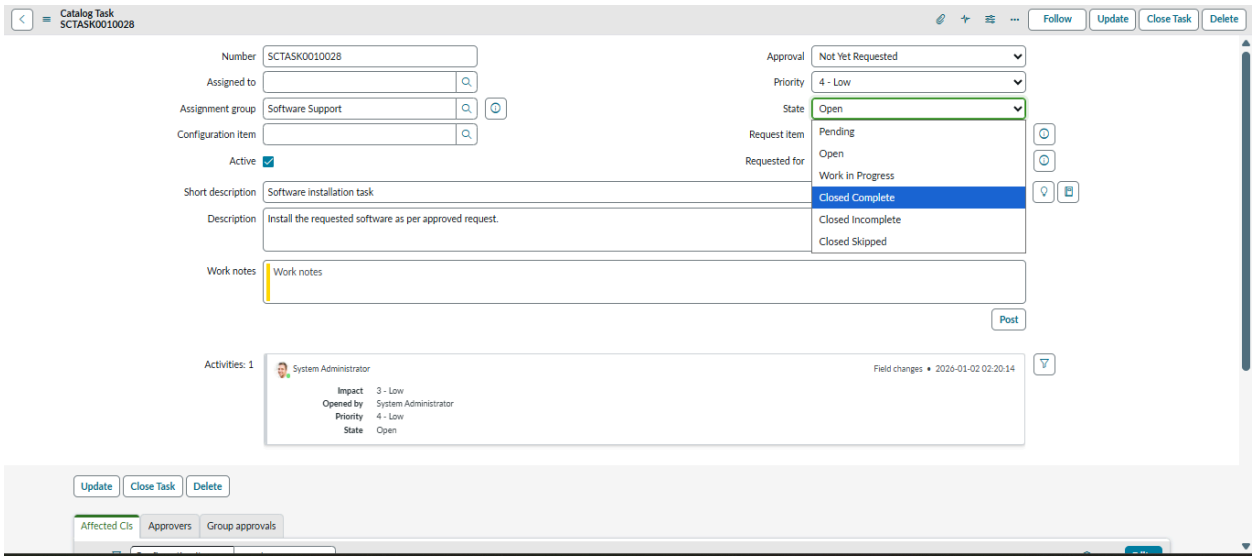
2.) Approve the request :

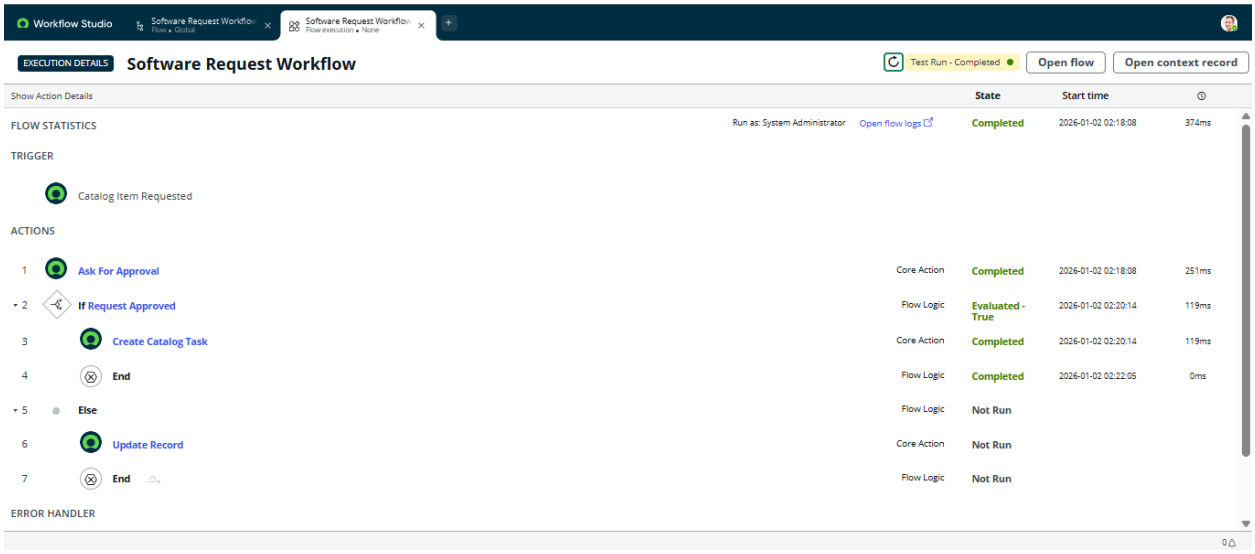




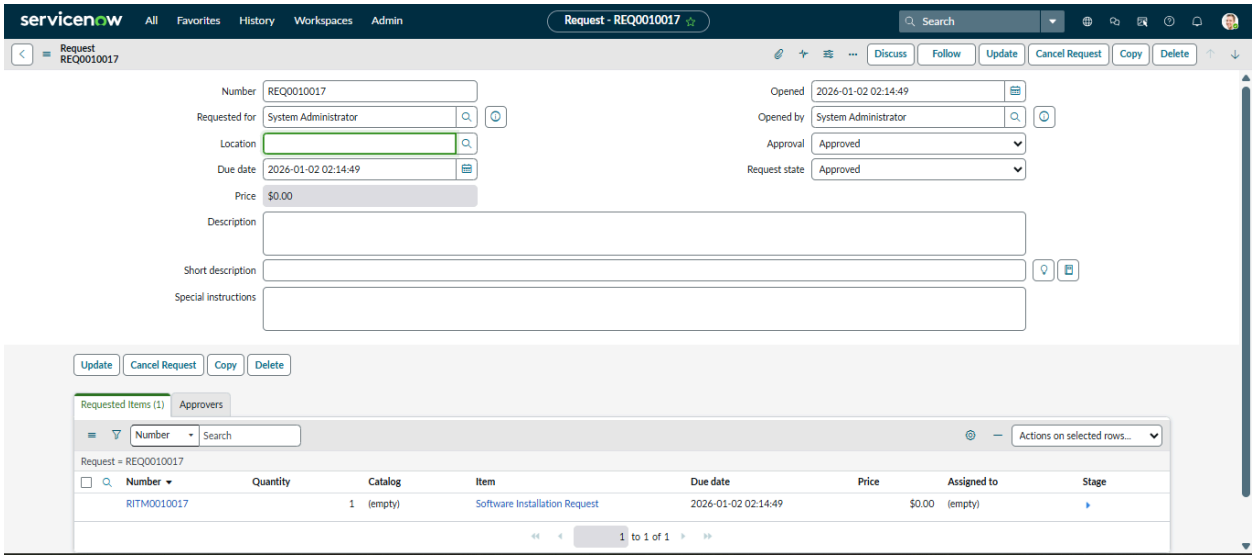
3.) Complete the catalog task :

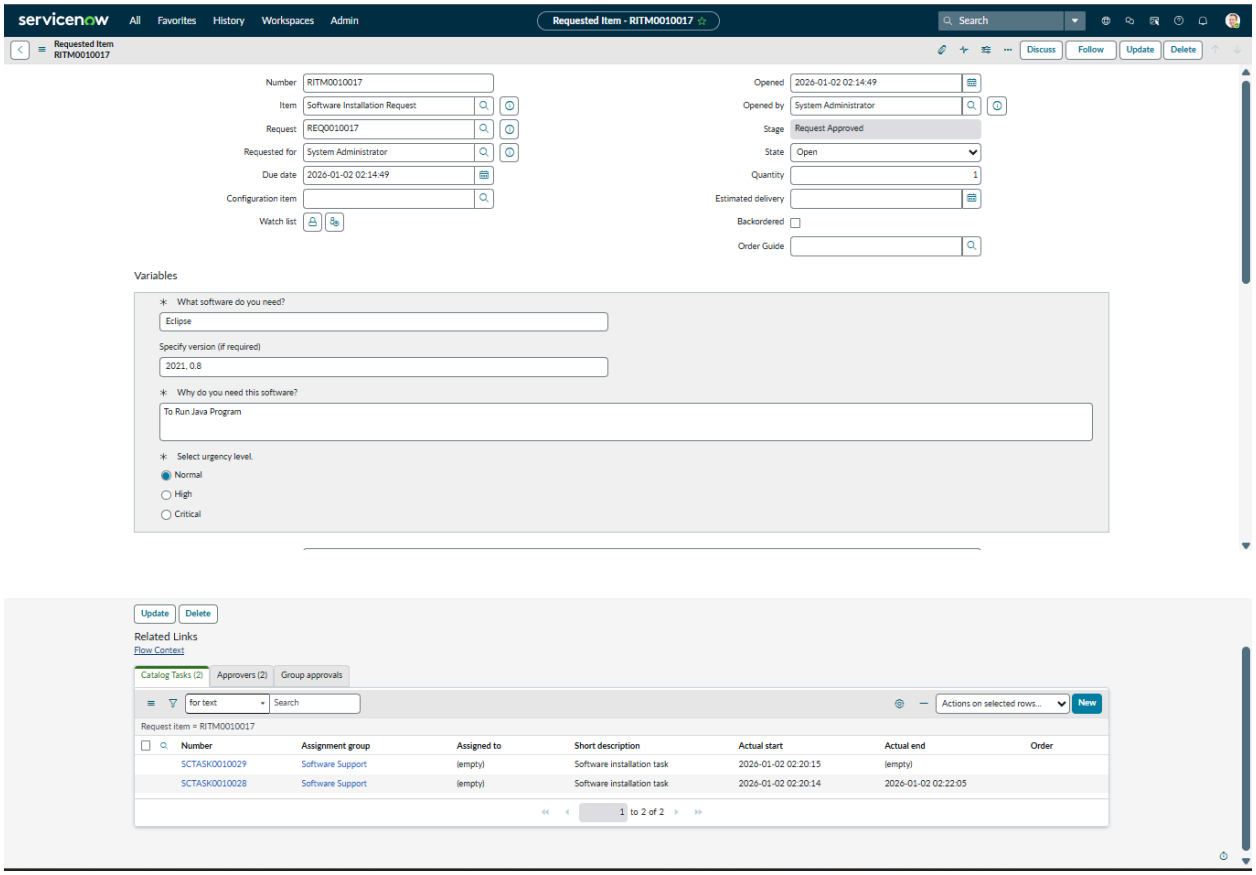

Workflow Studio
Software Request Workflow
Flow • Global
Software Request Workflow
Flow execution • None
EXECUTION DETAILS
Software Request Workflow
Test Run - Waiting
Cancel flow
Open flow
Open context record
Show Action Details
State
Start time
FLOW STATISTICS
Run as: System Administrator
Open flow logs
Waiting
2026-01-02 02:18:08
361ms
TRIGGER
Catalog Item Requested
ACTIONS
1 Ask For Approval
Core Action
Completed
2026-01-02 02:18:08
251ms
2 If Request Approved
Flow Logic
Evaluated - True
2026-01-02 02:20:14
106ms
3 Create Catalog Task
Core Action
Waiting
2026-01-02 02:20:14
106ms
4 End
Flow Logic
Not Run
5 Else
Flow Logic
Not Run
6 Update Record
Core Action
Not Run
7 End
Flow Logic
Not Run
ERROR HANDLER


Catalog Task
SCTASK0010028
Follow
Update
Close Task
Delete
Number
SCTASK0010028
Assigned to
Assignment group
Software Support
Configuration item
Active
Short description
Software installation task
Description
Install the requested software as per approved request.
Approval
Not Yet Requested
Priority
4 - Low
State
Open
Pending
Open
Work in Progress
Closed Complete
Closed Incomplete
Closed Skipped
Request item
Requested for
Work notes
Work notes
Post
Activities: 1
System Administrator
Field changes • 2026-01-02 02:20:14
Impact 3 - Low
Opened by System Administrator
Priority 4 - Low
State Open
Update
Close Task
Delete
Affected CIs
Approvers
Group approvals

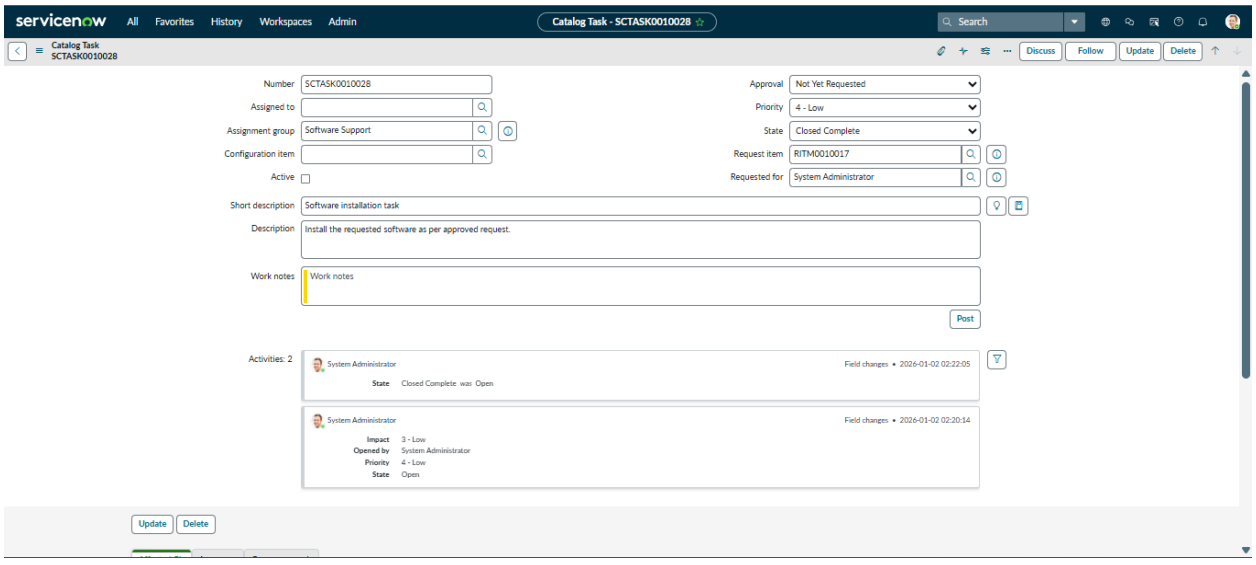


4.) Confirm RITM closure :




servicenow
All
Favorites
History
Workspaces
Admin
Requested Item - RITM0010017
Search
Requested Item
RITM0010017
Discuss
Follow
Update
Delete
Number
RITM0010017
Item
Software Installation Request
Request
REQ0010017
Requested for
System Administrator
Due date
2026-01-02 02:14:49
Configuration item
Watch list
Opened
2026-01-02 02:14:49
Opened by
System Administrator
Stage
Request Approved
State
Open
Quantity
1
Estimated delivery
Backordered
Order Guide
Variables
What software do you need?
Eclipse
Specify version (if required)
2021, 0.8
Why do you need this software?
To Run Java Program
Select urgency level.
Normal
High
Critical

Update
Delete
Related Links
Flow Context
Catalog Tasks (2)
Approvers (2)
Group approvals
for text
Search
Actions on selected rows...
New
Request item = RITM0010017
Number
Assignment group
Assigned to
Short description
Actual start
Actual end
Order
SCTASK0010029
Software Support
(empty)
Software installation task
2026-01-02 02:20:15
(empty)
SCTASK0010028
Software Support
(empty)
Software installation task
2026-01-02 02:20:14
2026-01-02 02:22:05
1 to 2 of 2


servicenow
All
Favorites
History
Workspaces
Admin
Catalog Task - SCTASK0010028
Search
Catalog Task
SCTASK0010028
Discuss
Follow
Update
Delete
Number
SCTASK0010028
Assigned to
Assignment group
Software Support
Configuration item
Active
Approval
Not Yet Requested
Priority
4 - Low
State
Closed Complete
Request item
RITM0010017
Requested for
System Administrator
Short description
Software installation task
Description
Install the requested software as per approved request.
Work notes
Work notes
Post
Activities: 2
System Administrator
Field changes • 2026-01-02 02:22:05
State
Closed Complete was Open
System Administrator
Field changes • 2026-01-02 02:20:14
Impact
3 - Low
Opened by
System Administrator
Priority
4 - Low
State
Open
Update
Delete

Outcome

The Setup Manual ensures the solution can be recreated reliably in any ServiceNow PDI. By following the documented steps and order of operations, administrators can implement, test, and deploy the Software Installation Request solution with minimal effort and consistent results.