



Phase – 1: Requirement Analysis & Planning

Execution Roadmap

Description

The execution roadmap defines a structured and phased approach for implementing the **Software Installation Request Automation** solution in ServiceNow. This roadmap outlines clearly defined milestones that guide the project from initial planning through deployment, ensuring that each stage is systematically executed, validated, and aligned with business and IT governance requirements.

By adopting a milestone-driven approach, the project minimizes implementation risks, ensures consistency, and enables effective collaboration between stakeholders. Each milestone focuses on a specific functional area, such as service catalog setup, workflow design, table identification, testing, and deployment. This structured roadmap supports controlled execution, timely delivery, and scalability of the solution.

Milestone 1: Update Sets Management

Objective

To capture, manage, and migrate all ServiceNow customizations related to the Software Installation Request Automation in a controlled and governed manner.

Activities

- Identify the scope of changes including Service Catalog items, workflows, client scripts, UI policies, business rules, and notifications.
- Define a standardized naming convention and documentation guidelines for Update Sets.
- Create a dedicated Update Set in the development environment to track all configurations.
- Collaborate with developers and administrators to ensure all relevant changes are included.
- Validate that the Update Set aligns with organizational deployment and ITSM governance processes.

This milestone ensures traceability, version control, and smooth migration across environments.

Milestone 2: Service Catalog Setup

Objective

To establish a structured and user-friendly Service Catalog for handling software installation requests.

Activities

- Identify and document software-related service request types.
- Define appropriate catalog categories such as Software, Hardware, and IT Services.
- Create a Software Installation Request catalog item with clear titles and descriptions.
- Collaborate with IT and business stakeholders to validate catalog content accuracy.
- Ensure catalog structure aligns with organizational ITSM processes and service offerings.

This milestone lays the foundation for standardized and consistent request intake.

Milestone 3: Workflow Design & Planning

Objective

To design a clear and compliant workflow structure for automating the software installation request lifecycle.

Activities

- Identify the end-to-end business process for software installation requests.
- Document process steps, approval decision points, and dependencies.
- Define roles and responsibilities for requesters, approvers, and fulfillment teams.
- Ensure workflow design aligns with ITIL and ITSM best practices.
- Validate workflow requirements with business and IT stakeholders.

This milestone ensures clarity, governance, and scalability in automation design.

Milestone 4: Attach Workflow to Catalog Item

Objective

To link the designed workflow to the Software Installation Request catalog item.

Activities

- Open the Software Installation Request catalog item in ServiceNow.
- Navigate to the workflow configuration section.
- Attach the appropriate workflow to the catalog item.

- Save and publish the catalog item.
- Verify that only one active workflow is associated to avoid conflicts.

This milestone enables automated execution of the workflow upon request submission.

Milestone 5: Requirement Analysis & Table Identification

Objective

To identify and define the ServiceNow tables required to manage software installation requests.

Activities

- Identify request-related tables used in ServiceNow:
 - `sc_request` (Request – REQ)
 - `sc_req_item` (Requested Item – RITM)
 - `sc_task` (Catalog Task – SCTASK)
- Define relationships between REQ, RITM, and SCTASK records.
- Map business requirements to relevant table fields.
- Validate data flow and handling requirements with stakeholders.

This milestone ensures accurate data modeling and lifecycle management.

Milestone 6: Tables Handling

Objective

To ensure effective handling and usage of request-related tables during automation.

Activities

- Confirm correct population of request, requested item, and task records.
- Validate relationships between REQ → RITM → SCTASK.
- Ensure approval states, fulfillment tasks, and requester data are properly stored.
- Align table handling with workflow and reporting requirements.

This milestone supports data integrity and consistent request processing.

Milestone 7: Testing & Validation

Objective

To verify that the software installation request process functions correctly from submission to fulfillment.

Activities

- Submit test requests via the Service Portal.
- Validate approval and rejection scenarios.
- Confirm automatic task creation and assignment to IT Software Support teams.
- Verify notification delivery at key lifecycle stages.
- Ensure validation rules prevent incomplete or incorrect requests.

This milestone ensures reliability and readiness of the solution before deployment.

Milestone 8: Deployment

Objective

To deploy the Software Installation Request Automation solution into the production environment.

Activities

- Capture all configurations in Update Sets.
- Migrate configurations from Development to Test and Production environments.
- Validate live functionality with real requests.
- Provide training to end users and IT support teams.
- Document workflows, approvals, and escalation paths for future reference.

This milestone marks the successful rollout of the solution and ensures operational stability.

Outcome

The execution roadmap provides a clear and structured implementation plan for the Software Installation Request Automation solution. By following this phased approach, the organization achieves controlled deployment, reduced implementation risk, and consistent governance. The roadmap establishes a scalable framework that supports future enhancements and advanced automation within the ServiceNow platform.

