



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
-

Step 1: Create Update Set

Objective

To capture all configurations related to the project.

Steps

Navigate to:

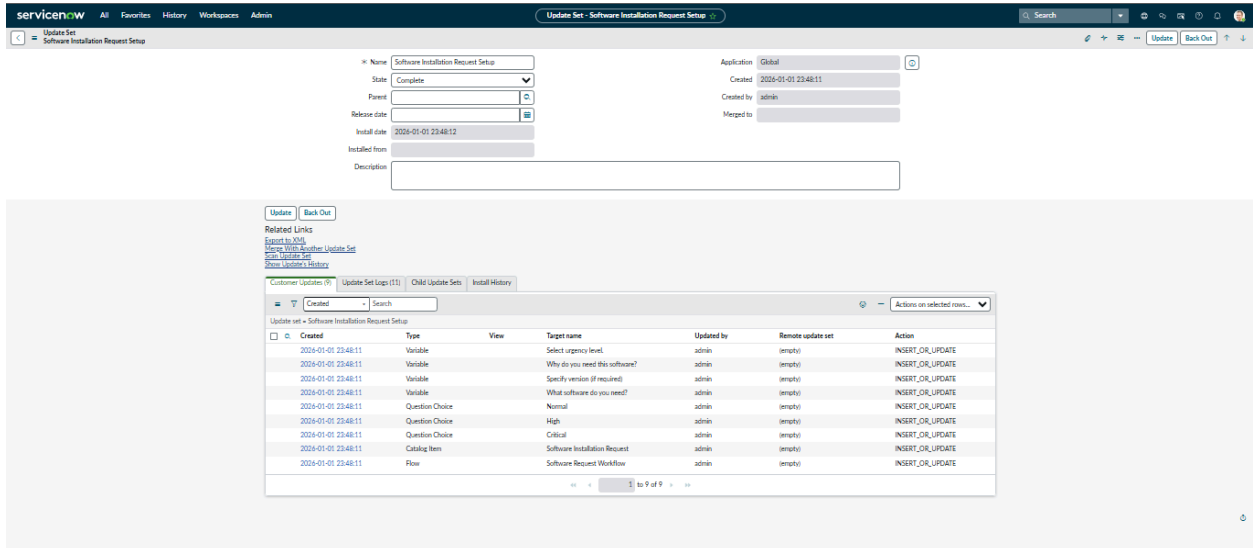
[System Update Sets](#) → [Local Update Sets](#)

- 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.



The screenshot shows the ServiceNow interface for creating an update set. The form is titled "Update Set - Software Installation Request Setup". It includes the following fields:

- Name: Software Installation Request Setup
- State: Complete
- Parent: (empty)
- Release date: (empty)
- Install date: 2024-01-01 23:48:12
- Installed from: (empty)
- Description: (empty)

Below the form, there is a section for "Related Links" and a table of "Update Set Logs".

Created	Type	View	Target name	Updated by	Remote update set	Action
2024-01-01 23:48:11	Variable		Select update level	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Variable		Why do you need this software?	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Variable		Specify version of required	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Variable		What software do you need?	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Question Choice		Normal	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Question Choice		High	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Question Choice		Critical	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Catalog Item		Software Installation Request	admin	(empty)	INSERT_OR_UPDATE
2024-01-01 23:48:11	Flow		Software Request Workflow	admin	(empty)	INSERT_OR_UPDATE

Step 2: Create Service Catalog Item

Objective

To define the Software Installation Request entry point for users.

Steps

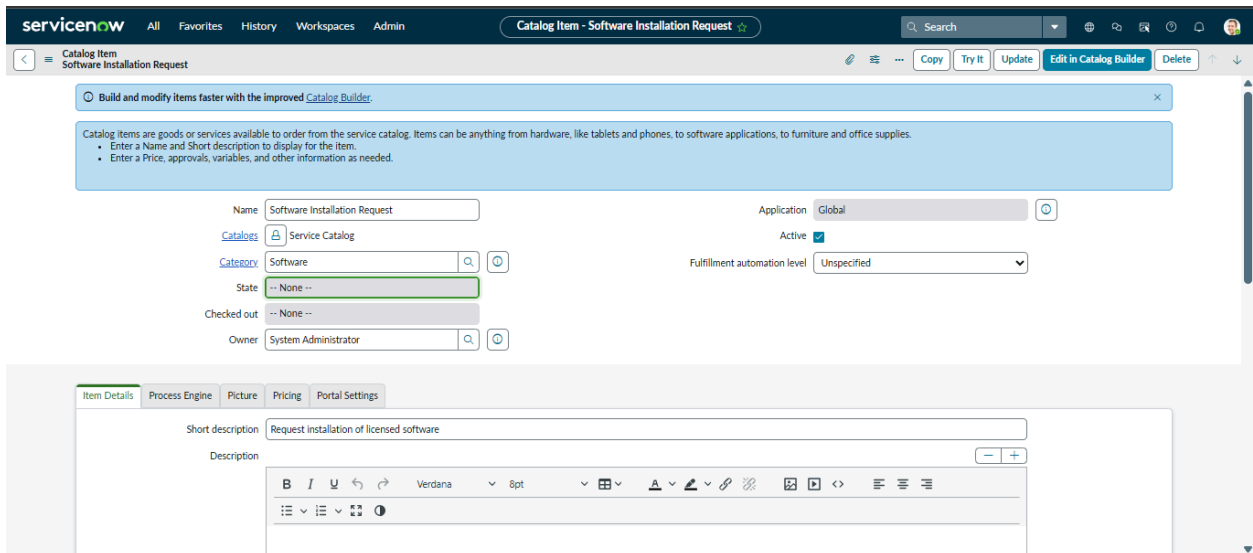
Navigate to:

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.



The screenshot displays the ServiceNow interface for creating a new catalog item. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current page title is 'Catalog Item - Software Installation Request'. A search bar is located on the right. Below the navigation bar, there is a blue banner with the text 'Build and modify items faster with the improved Catalog Builder.' and a close button. Below the banner, a light blue box contains instructions: 'Catalog items are goods or services available to order from the service catalog. Items can be anything from hardware, like tablets and phones, to software applications, to furniture and office supplies. Enter a Name and Short description to display for the item. Enter a Price, approvals, variables, and other information as needed.' The form fields are as follows: 'Name' is 'Software Installation Request'; 'Application' is 'Global'; 'Catalog' is 'Service Catalog'; 'Category' is 'Software'; 'State' is 'None'; 'Checked out' is 'None'; 'Owner' is 'System Administrator'; 'Active' is checked; and 'Fulfillment automation level' is 'Unspecified'. Below the form fields, there are tabs for 'Item Details', 'Process Engine', 'Picture', 'Pricing', and 'Portal Settings'. The 'Item Details' tab is selected, showing a 'Short description' field with the text 'Request installation of licensed software' and a 'Description' field with a rich text editor toolbar.

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.

The screenshot shows the ServiceNow interface for a 'Catalog Item - Software Installation Request'. The 'Variables' tab is selected, displaying a table of configured variables. The table has columns for Type, Read only, Mandatory, Question, Name, Order, Tooltip, and Created. There are four variables listed: 'Single Line Text' (software_name), 'Single Line Text' (software_version), 'Multi Line Text' (license_justification), and 'Multiple Choice' (urgency). The 'urgency' variable is highlighted in blue.

Type	Read only	Mandatory	Question	Name	Order	Tooltip	Created
Single Line Text	false	true	What software do you need?	software_name	100	Enter the name of the software	2025-12-31 21:56:30
Single Line Text	false	false	Specify version (if required)	software_version	200	Enter required version	2025-12-31 21:58:13
Multi Line Text	false	true	Why do you need this software?	license_justification	300	Explain the business or learning need fo	2025-12-31 22:01:48
Multiple Choice	false	true	Select urgency level.	urgency	400	Select the urgency of the request is	2026-01-01 05:23:02

Step 4: Workflow / Flow Designer Configuration

Objective

To automate approvals and fulfillment.

Steps

Navigate to:

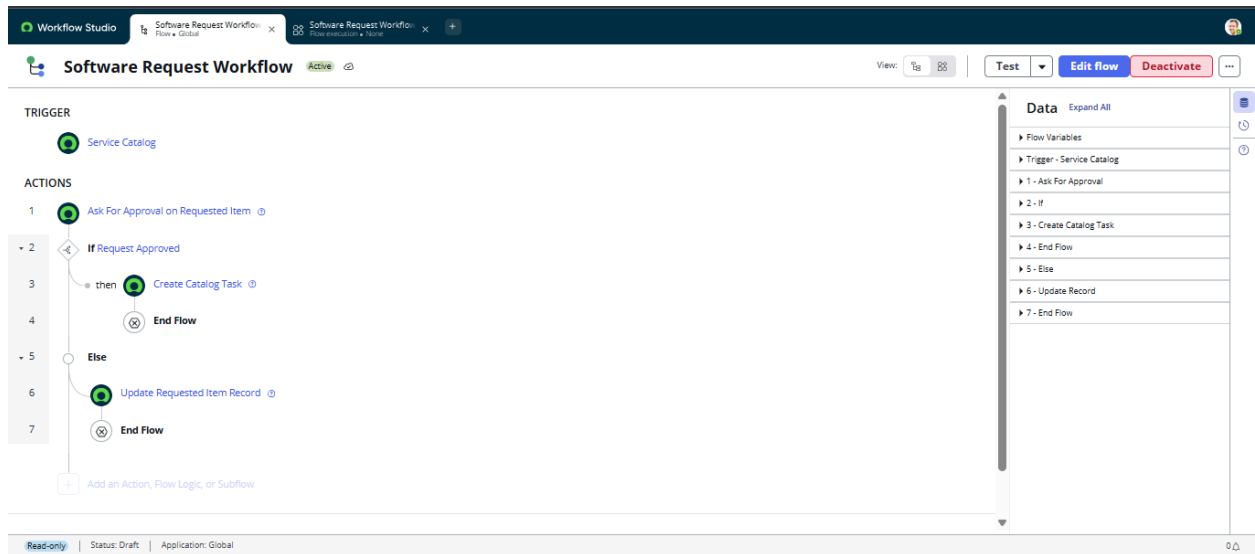
Flow Designer

- 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.

servicenow All Favorites History Workspaces Admin Catalog Item - Software Installation Request

Build and modify items faster with the improved [Catalog Builder](#)

Catalog items are goods or services available to order from the service catalog. Items can be anything from hardware, like tablets and phones, to software applications, to furniture and office supplies.

- Enter a Name and Short description to display for the item.
- Enter a Price, approvals, variables, and other information as needed.

Name: Software Installation Request Application: Global

Category: Service Catalog Active: ☒ Fulfillment automation level: Unspecified

State: -- None --

Checked out: -- None --

Owner: System Administrator

Item Details **Process Engine** Picture Pricing Portal Settings

Select the appropriate process engine for the catalog item. Only one engine can be selected.

Flow: Software Request Workflow

Workflow:

Execution Plan:

Copy Try It Update **Edit in Catalog Builder** Delete

Related Links
[Item Diagnostic](#)
[Run Point Scan](#)

Step 6: Requirement Analysis & Table Verification

Objective

To validate backend data creation.

Tables Verified

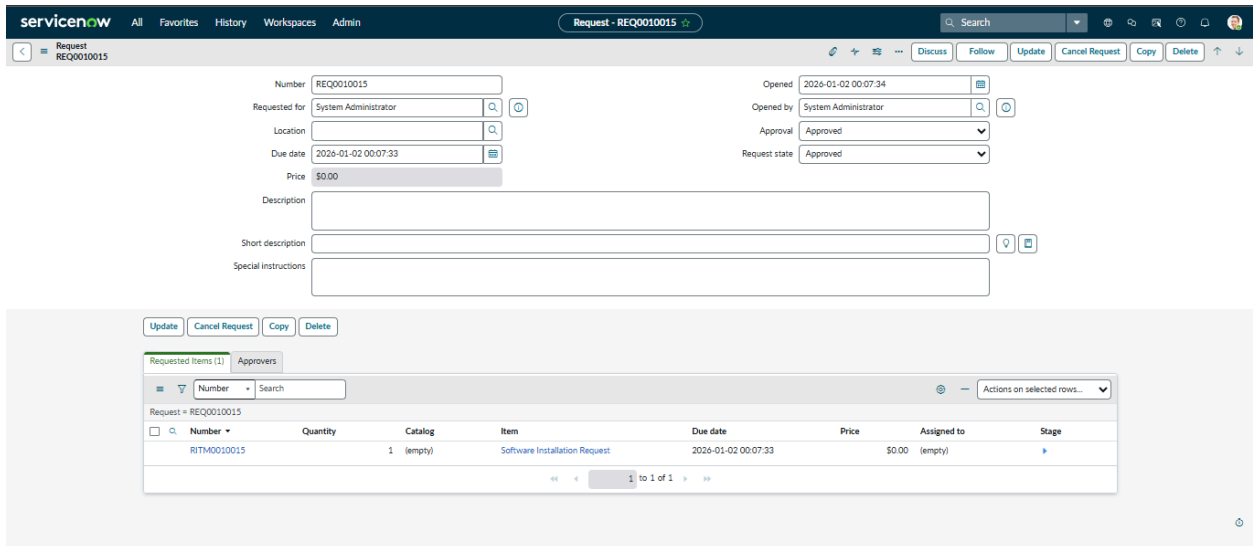
- sc_request (REQ)
- sc_req_item (RITM)
- sc_task (SCTASK)

Steps

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

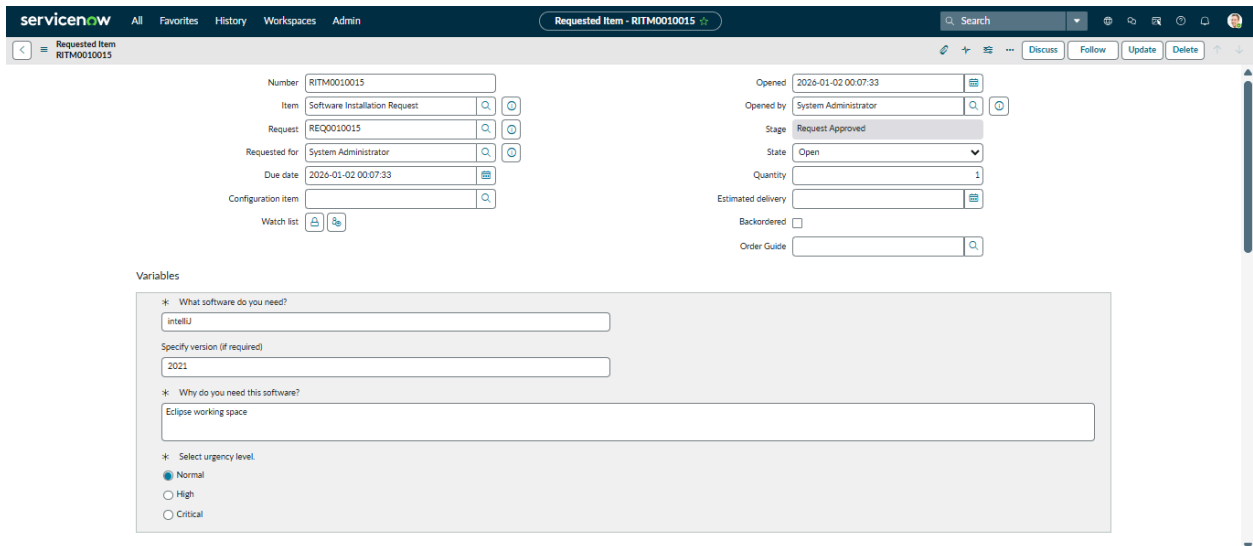
Screenshot Evidence – Backend Table Verification

Insert screenshot showing linked REQ → RITM → SCTASK.



The screenshot shows the ServiceNow Request form for REQ0010015. The form includes fields for Number, Requested for, Location, Due date, Price, Description, Short description, and Special instructions. The Requested Items table is visible, showing one item: RITM0010015, which is a Software Installation Request with a quantity of 1 and a due date of 2026-01-02 00:07:33. The Price is \$0.00 and the Assigned to field is empty. The Stage is set to Request Approved.

Number	Quantity	Catalog	Item	Due date	Price	Assigned to	Stage
RITM0010015	1	(empty)	Software Installation Request	2026-01-02 00:07:33	\$0.00	(empty)	Request Approved



The screenshot shows the ServiceNow Requested Item form for RITM0010015. The form includes fields for Number, Item, Request, Requested for, Due date, Configuration item, Watch list, Opened, Opened by, Stage, State, Quantity, Estimated delivery, Backordered, and Order Guide. The Variables section is expanded, showing three variables: "What software do you need?" with the value "intelliJ", "Specify version (if required)" with the value "2021", and "Why do you need this software?" with the value "Eclipse working space". The "Select urgency level" section shows the "Normal" radio button selected.

Variables

- * What software do you need?
intelliJ
- Specify version (if required)
2021
- * Why do you need this software?
Eclipse working space
- * Select urgency level.
☒ Normal
☐ High
☐ Critical

servicenow All Favorites History Workspaces Admin Requested Item - RITM0010015

Requested Item RITM0010015

System Administrator
System Administrator requested to approve task
Comments • 2026-01-02 00:07:57

System
System Administrator requested to approve task
Comments • 2026-01-02 00:07:36

System Administrator
Field changes • 2026-01-02 00:07:33
Impact 3 - Low
Opened by System Administrator
Priority 4 - Low
State Open

Update Delete

Related Links
Flow Context

Catalog Tasks (3) Approvers (4) Group approvals

for text Search Actions on selected rows... New

Request item = RITM0010015

Number	Assignment group	Assigned to	Short description	Actual start	Actual end	Order
SCTASK0010027	Software Support	(empty)	Software installation task	2026-01-02 00:49:30	2026-01-02 00:53:04	
SCTASK0010026	Software Support	(empty)	Software installation task	2026-01-02 00:09:06	(empty)	
SCTASK0010025	Software Support	(empty)	Software installation task	2026-01-02 00:09:05	2026-01-02 00:11:11	

1 to 3 of 3

servicenow All Favorites History Workspaces Admin Catalog Task - SCTASK0010027

Catalog Task SCTASK0010027

Number SCTASK0010027
Assigned to
Assignment group Software Support
Configuration item
Active
Short description Software installation task
Description Install the requested software as per approved request.
Work notes
Post

Approval Not Yet Requested
Priority 4 - Low
State Closed Complete
Request item RITM0010015
Requested for System Administrator

Activities: 2

System Administrator
State Closed Complete was Open
Field changes • 2026-01-02 00:53:04

System Administrator
Impact 3 - Low
Opened by System Administrator
Priority 4 - Low
State Open
Field changes • 2026-01-02 00:49:30

Update Delete

Step 7: Test Submission & Validation

Objective

To validate end-to-end functionality.

Steps

Navigate to:

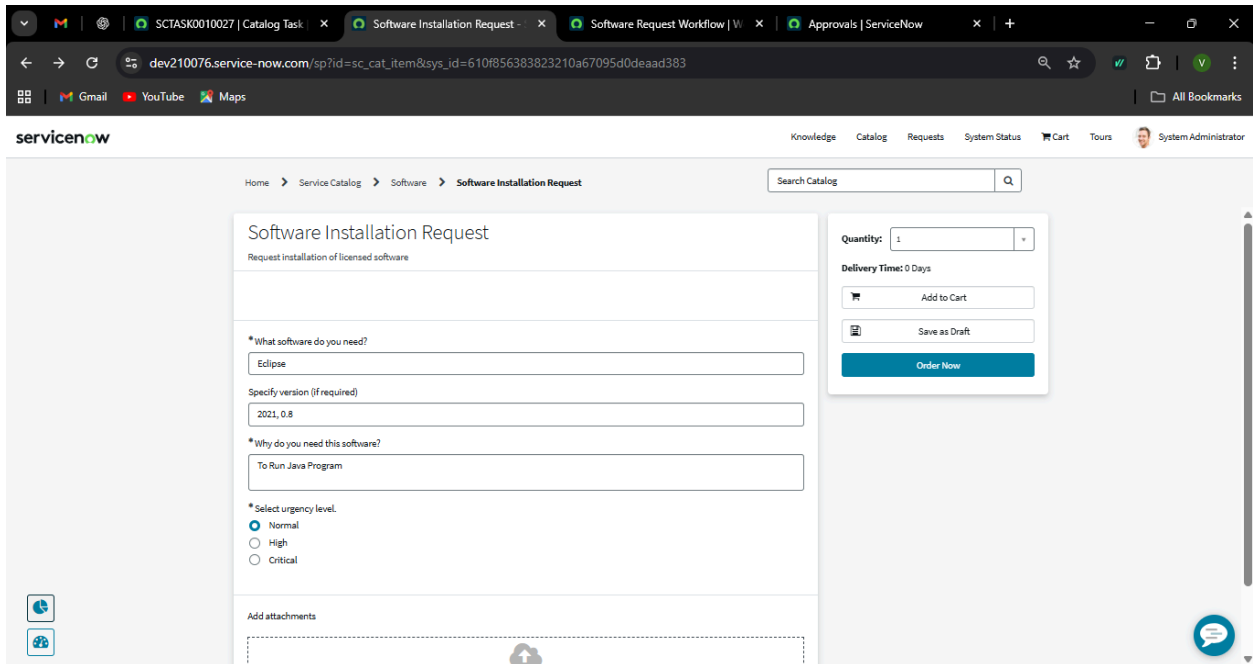
Service Portal (/sp)

- 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 :



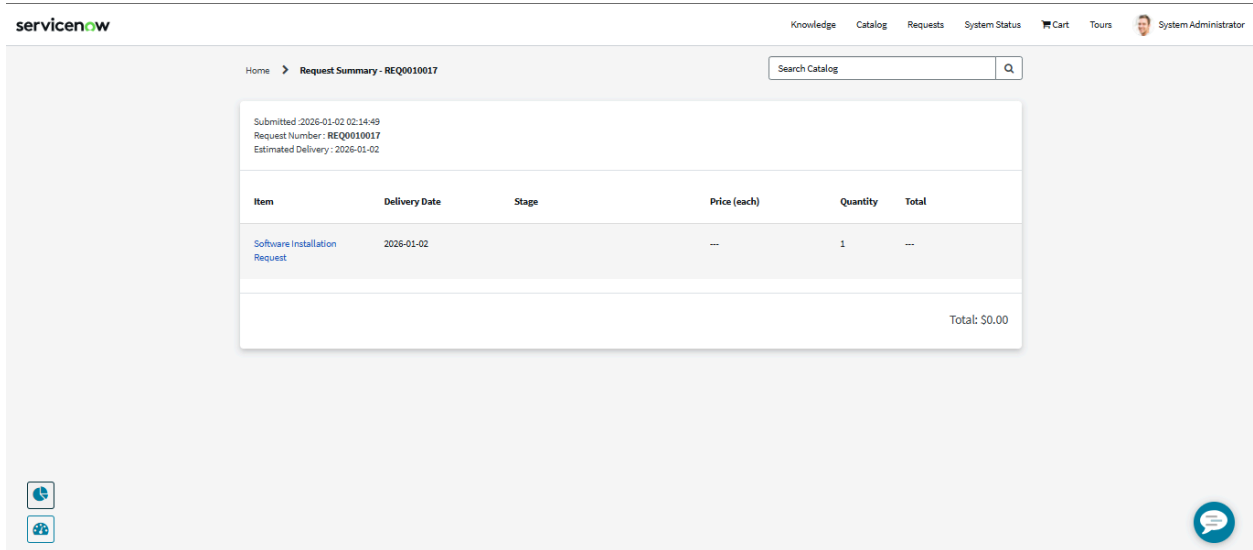
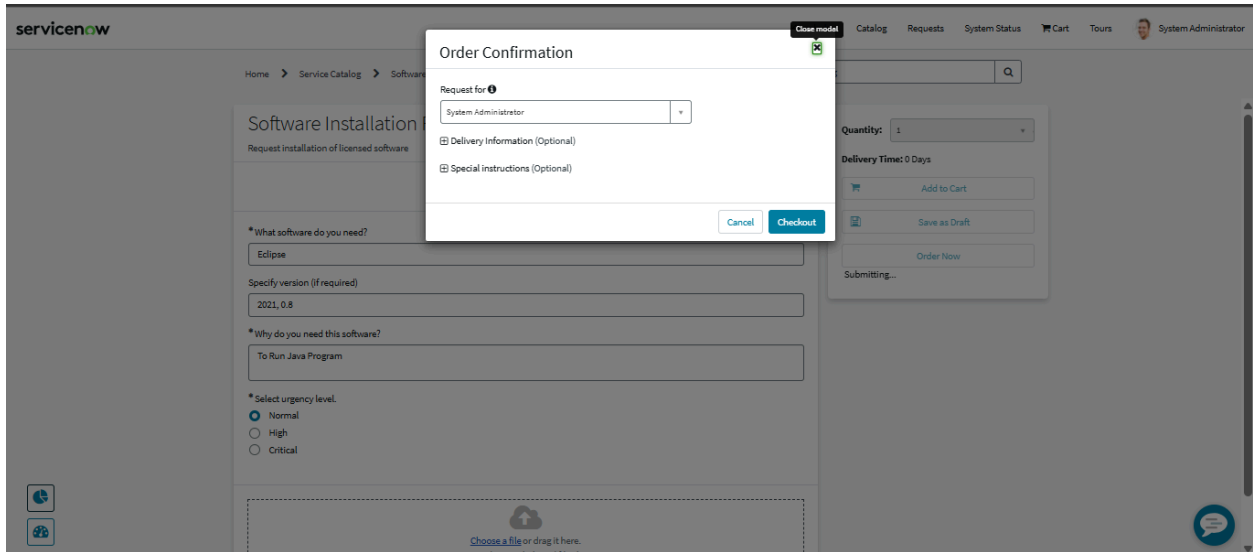
The screenshot shows the ServiceNow 'Software Installation Request' form. The browser address bar displays the URL: `dev210076.service-now.com/sp?id=sc_cat_item&sys_id=610f856383823210a67095d0deaad383`. The form is titled 'Software Installation Request' with the subtitle 'Request installation of licensed software'. It includes a search bar at the top right. The form fields are as follows:

- *What software do you need?**: Text input field containing 'Eclipse'.
- Specify version (if required)**: Text input field containing '2021, 0.8'.
- *Why do you need this software?**: Text input field containing 'To Run Java Program'.
- *Select urgency level.**: Radio button selection with options: ☒ Normal, ☐ High, ☐ Critical.
- Add attachments**: A dashed box with a cloud upload icon.

On the right side of the form, there is a sidebar with the following elements:

- Quantity:** A dropdown menu set to '1'.
- Delivery Time:** '0 Days'.
- Buttons:** 'Add to Cart' (with a shopping cart icon), 'Save as Draft' (with a document icon), and 'Order Now' (in a blue box).

The bottom of the page features a 'System Administrator' profile icon and a chat bubble icon.



2.) Approve the request :

Workflow Studio | Software Request Workflow | Software Request Workflow

EXECUTION DETAILS | **Software Request Workflow** | Test Run - Waiting | Cancel flow | Open flow | Open context record

Show Action Details

Run as: System Administrator | Open flow logs | **Waiting** | 2026-01-02 02:18:08 | 98ms

FLOW STATISTICS

TRIGGER

- Catalog Item Requested

ACTIONS

Step	Action	Core Action	Flow Logic	State	Start time	Duration
1	Ask For Approval	Core Action	Waiting	Waiting	2026-01-02 02:18:08	94ms
2	If Request Approved	Flow Logic	Not Run	Not Run		
3	Create Catalog Task	Core Action	Not Run	Not Run		
4	End	Flow Logic	Not Run	Not Run		
5	Else	Flow Logic	Not Run	Not Run		
6	Update Record	Core Action	Not Run	Not Run		
7	End	Flow Logic	Not Run	Not Run		

ERROR HANDLER

Approval
Requested Item: RITM0010017

Approver: System Administrator | Approving: Requested Item: RITM0010017

State: Requested

Approval Reason: Not Yet Requested

Summary of Item being approved:

Description	Price	Quantity	Total
Request installation	\$0.00	1	\$0.00

Comments: No Longer Required

Activities: 1

System Administrator | Field changes: 2026-01-02 02:18:08

Update | Approve | Reject | Delete

3.) Complete the catalog task :

Workflow Studio

Software Request Workflow

Software Request Workflow

EXECUTION DETAILS

Software Request Workflow

Test Run - Waiting

Cancel flow

Open flow

Open context record

Show Action Details

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

Approval

Not Yet Requested

Assigned to

Priority

4 - Low

Assignment group

Software Support

State

Open

Configuration item

Request item

Pending

Active

☒

Requested for

Open

Short description

Software installation task

Work in Progress

Description

Install the requested software as per approved request.

Closed Complete

Work notes

Work notes

Closed Incomplete

Closed Skipped

Post

Activities: 1

System Administrator

Impact3 - Low

Opened bySystem Administrator

Priority4 - Low

StateOpen

Field changes • 2026-01-02 02:20:14

Update

Close Task

Delete

Affected CIs

Approvers

Group approvals

servicenow

AllFavoritesHistoryWorkspacesAdmin

Requested Item - RITM0010017

Search

Requested ItemRITM0010017

DiscussFollowUpdateDelete

NumberRITM0010017

ItemSoftware Installation Request

RequestREQ00100017

Requested forSystem Administrator

Due date2026-01-02 02:14:49

Configuration item

Watch list

Opened2026-01-02 02:14:49

Opened bySystem Administrator

StageRequest Approved

StateOpen

Quantity1

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

UpdateDelete

Related Links

Flow Context

Catalog Tasks (2)Approvers (2)Group approvals

For textSearch

Actions on selected rows...New

Request item = RITM0010017

	Number	Assignment group	Assigned to	Short description	Actual start	Actual end	Order
<input type="checkbox"/>	SCTASK0010029	Software Support	(empty)	Software installation task	2026-01-02 02:20:15	(empty)	
<input type="checkbox"/>	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

AllFavoritesHistoryWorkspacesAdmin

Catalog Task - SCTASK0010028

Search

Catalog TaskSCTASK0010028

DiscussFollowUpdateDelete

NumberSCTASK0010028

Assigned to

Assignment groupSoftware Support

Configuration item

Active

Short descriptionSoftware installation task

DescriptionInstall the requested software as per approved request.

Work notes

Post

ApprovalNot Yet Requested

Priority4 - Low

StateClosed Complete

Request itemRITM0010017

Requested forSystem Administrator

Activities: 2

System Administrator

StateClosed Complete was: Open

Field changes • 2026-01-02 02:22:05

System Administrator

Impact3 - Low

Opened bySystem Administrator

Priority4 - Low

StateOpen

Field changes • 2026-01-02 02:20:14

UpdateDelete

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.