



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 'Update Set - Software Installation Request Setup' page in ServiceNow. At the top, there are fields for Name (Software Installation Request Setup), State (Complete), Application (Global), and Created by (admin). Below these are fields for Parent, Release date, Install date, Installed from, and Description. The 'Created' filter dropdown is set to 'Created'. The main table lists various items under the 'Customer Update' tab, including rows for 'Variable', 'Question Choice', and 'Catalog Item'. The table has columns for Type, View, Target name, Updated by, Remote update set, and Action. The 'Action' column shows entries like 'INSERT_OR_UPDATE' for most rows. A search bar and a 'Actions on selected rows...' button are also visible at the bottom of the table.

Step 2: Create Service Catalog Item

Objective

To define the Software Installation Request entry point for users.

Steps

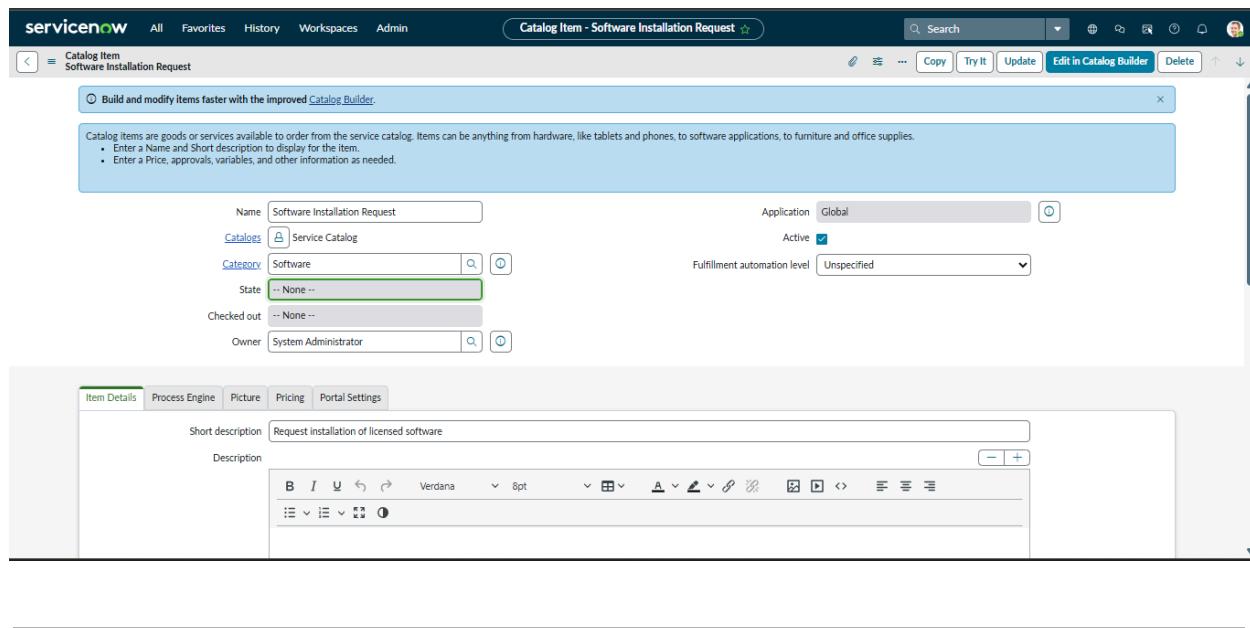
Navigate to:

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 Catalog Item - Software Installation Request form. The top navigation bar includes links for All, Favorites, History, Workspaces, Admin, and a search bar. Below the header, a message encourages using the Catalog Builder. The main form contains the following fields:

- Name:** Software Installation Request
- Application:** Global
- Active:** Checked
- Catalog:** Service Catalog
- Category:** Software
- State:** None
- Checked out:** None
- Owner:** System Administrator

Below the form, there are tabs for Item Details, Process Engine, Picture, Pricing, and Portal Settings. The Item Details tab is active, showing the Short description field containing "Request installation of licensed software" and a rich text editor for the Description field.

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 'Software Installation Request' catalog item. At the top, there's a search bar and various navigation links like 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. Below the header, there's a 'Meta' field for adding relevant tags. The main content area displays a table titled 'Variables (4)'. The table has columns for 'Type', 'Read only', 'Mandatory', 'Question', 'Name', 'Order', 'Tooltip', and 'Created'. The data in the table is as follows:

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

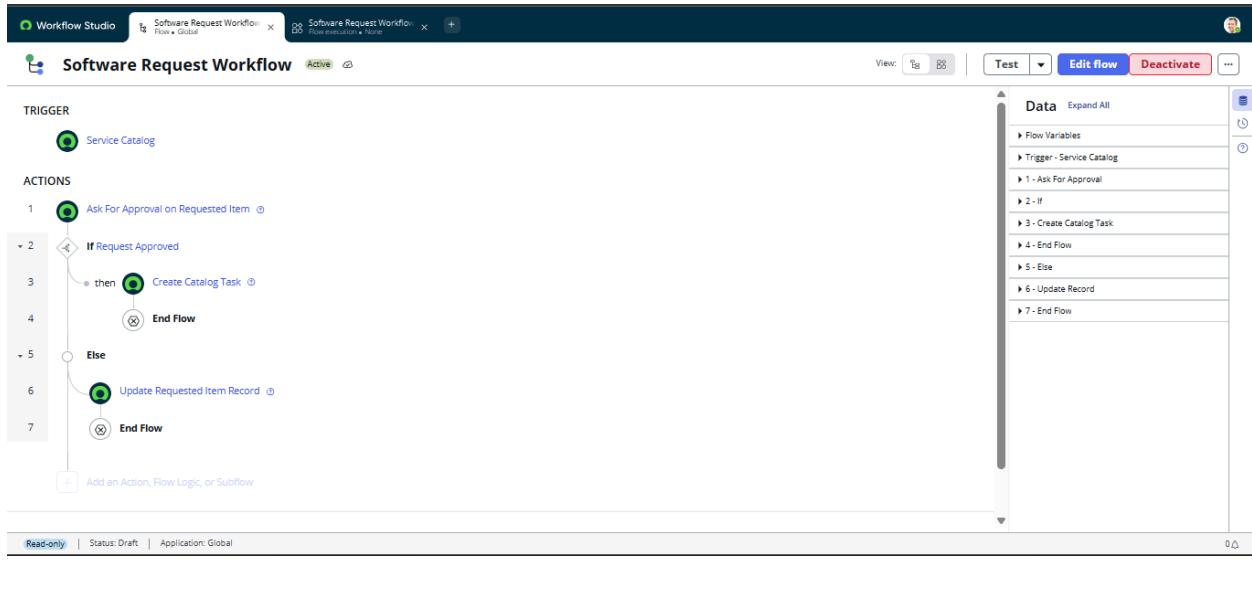
Navigate to:

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.

The screenshot shows the ServiceNow Catalog Item - Software Installation Request page. The main form includes fields for Name (Software Installation Request), Application (Global), Category (Software), Active status, and Fulfillment automation level (Unspecified). Below the main form, there is a tabbed section for Process Engine, which contains fields for Flow (Software Request Workflow), Workflow, and Execution Plan. At the bottom of the page, there are buttons for Copy, Try It, Update, Delete, and links for Related Links, Item Diagnostic, and 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.

servicenow All Favorites History Workspaces Admin Request - REQ0010015

Number: REQ0010015
Requested for: System Administrator
Location:
Due date: 2026-01-02 00:07:33
Price: \$0.00
Description:
Short description:
Special instructions:

Opened: 2026-01-02 00:07:33
Opened by: System Administrator
Approval: Approved
Request state: Approved

Update Cancel Request Copy Delete

Requested Items (1) Approvers

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

servicenow All Favorites History Workspaces Admin Requested Item - RITM0010015

Number: RITM0010015
Item: Software Installation Request
Request: REQ0010015
Requested for: System Administrator
Due date: 2026-01-02 00:07:33
Configuration item:
Watch list:

Opened: 2026-01-02 00:07:33
Opened by: System Administrator
Stage: Request Approved
State: Open
Quantity: 1
Estimated delivery:
Backordered:
Order Guide:

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

Requested Item - RITM0010015

Comments:

- System Administrator requested to approve task (Comments: 2026-01-02 00:07:57)
- System Administrator requested to approve task (Comments: 2026-01-02 00:07:36)
- System Administrator (Impact: 3 - Low, Opened by: System Administrator, Priority: 4 - Low, State: Open) (Field changes: 2026-01-02 00:07:33)

Catalog Tasks (3) Approvers (4) Group approvals

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 00:11:16	

Catalog Task - SCTASK0010027

Number: SCTASK0010027

Assigned to: (empty)

Assignment group: Software Support

Configuration item: (empty)

Active:

Approval: Not Yet Requested

Priority: 4 - Low

State: Closed Complete

Request item: RITM0010015

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 (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)

Step 7: Test Submission & Validation

Objective

To validate end-to-end functionality.

Steps

Navigate to:

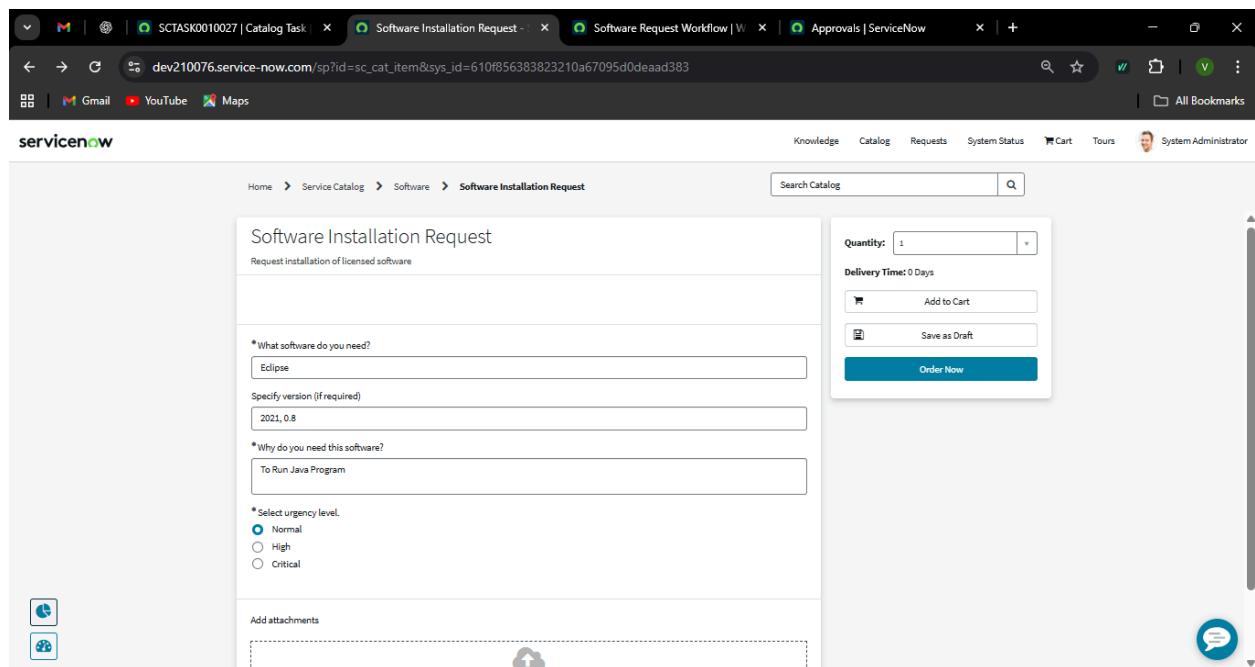
Service Portal (/sp)

- 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 a ServiceNow web interface for a 'Software Installation Request'. The URL in the browser is https://dev210076.service-now.com/sp?id=sc_cat_item&sys_id=610f856383823210a67095d0deaad383. The page title is 'Software Installation Request'. The main form fields include:

- * 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

On the right side of the form, there are buttons for quantity (Quantity: 1), delivery time (0 Days), and actions:
 Add to Cart
 Save as Draft
 Order Now

At the bottom left, there are icons for 'Add attachments' and a cloud storage icon. At the bottom right, there is a blue speech bubble icon.

servicenow

Home > Service Catalog > Software

Software Installation
Request installation of licensed software

* 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

Choose a file or drag it here.

Order Confirmation

Request for: System Administrator

Delivery Information (Optional)

Special instructions (Optional)

Cancel Checkout

Quantity: 1

Delivery Time: 0 Days

Add to Cart

Save as Draft

Order Now

Submitting...

servicenow

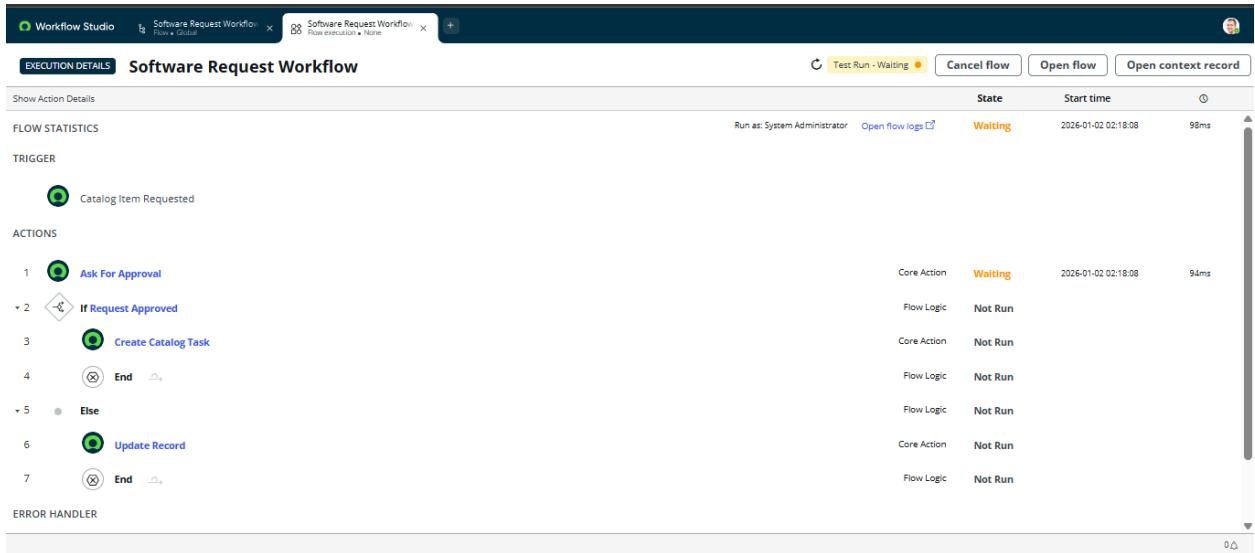
Home > Request Summary - REQ0010017

Knowledge Catalog Requests System Status Cart Tours System Administrator

Item	Delivery Date	Stage	Price (each)	Quantity	Total
Software Installation Request	2026-01-02		---	1	---

Total: \$0.00

2.) Approve the request :



= Approval Requested Item: RITM0010017

Approver	System Administrator	Approving	Requested Item: RITM0010017	
State	Requested			
Approval Reason	Not Yet Requested			
Summary of item being approved:	Approved			
Description	Approved	Price	Quantity	Total
Request installation	Rejected	\$0.00	1	\$0.00
Comments	Cancelled			
	No Longer Required			

Post

Activities: 1

System Administrator

Approver: System Administrator

State: Requested

Field changes • 2026-01-02 02:18:08

Update Approve Reject Delete

3.) Complete the catalog task :

Execution Details Software Request Workflow

Test Run - Waiting | Cancel flow | Open flow | Open context record

SHOW ACTION DETAILS

FLOW STATISTICS

Run at: 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

0 ▲

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 Open Work in Progress Closed Complete Closed Incomplete Closed Skipped
Active	<input checked="" type="checkbox"/>	Requested for	
Short description	Software installation task		
Description	Install the requested software as per approved request.		
Work notes	Work notes		Post

Activities: 1

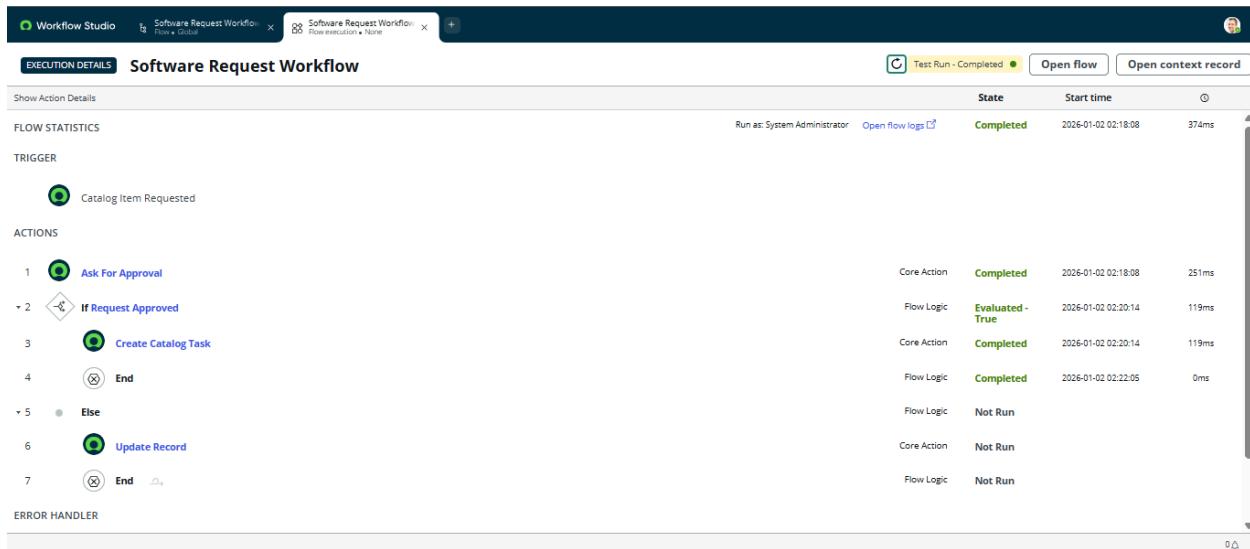
System Administrator

Impact: 3 - Low
Opened by: System Administrator
Priority: 4 - Low
State: Open

Field changes • 2026-01-02 02:20:14

Update | Close Task | Delete

Affected Cls | Approvers | Group approvals



4.) Confirm RITM closure :

servicenow All Favorites History Workspaces Admin Request - REQ0010017

Request - REQ0010017

Number	REQ0010017	Opened	2026-01-02 02:14:49	
Requested for	System Administrator	Opened by	System Administrator	
Location		Approval	Approved	
Due date	2026-01-02 02:14:49	Request state	Approved	
Price	\$0.00			
Description				
Short description				
Special instructions				

Update Cancel Request Copy Delete

Requested Items (1)

Number	Quantity	Catalog	Item	Due date	Price	Assigned to	Stage
RITM0010017	1 (empty)	Software Installation Request		2026-01-02 02:14:49	\$0.00 (empty)		

servicenow All Favorites History Workspaces Admin Requested Item - RITM0010017

Requested Item RITM0010017

Number	RITM0010017	Opened	2026-01-02 02:14:49
Item	Software Installation Request	Opened by	System Administrator
Request	REQ0010017	Stage	Request Approved
Requested for	System Administrator	State	Open
Due date	2026-01-02 02:14:49	Quantity	1
Configuration item		Estimated delivery	
Watch list		Backordered	<input type="checkbox"/>
		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

Related Links

Flow Context

Catalog Tasks (2) Approvers (2) Group approvals

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	

servicenow All Favorites History Workspaces Admin Catalog Task - SCTASK0010028

Catalog Task SCTASK0010028

Number	SCTASK0010028	Approval	Not Yet Requested
Assigned to		Priority	4 - Low
Assignment group	Software Support	State	Closed Complete
Configuration item		Request item	RITM0010017
Active	<input type="checkbox"/>	Requested for	System Administrator
Short description	Software installation task		
Description	Install the requested software as per approved request.		
Work notes	Work notes	<input type="button" value="Post"/>	

Activities: 2

System Administrator	State	Closed Complete was Open	Field changes • 2026-01-02 02:22:05
System Administrator	Impact	3 - Low	Field changes • 2026-01-02 02:20:14
	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.