

Phase – 4: Data Migration, Testing & Security

Automation Logic

Description

The Automation Logic phase focuses on implementing backend automation to manage the lifecycle of the **Software Installation Request** submitted through the Service Catalog. The automation ensures that requests are automatically routed for approval, fulfillment tasks are generated for the IT team, and the overall request status is tracked seamlessly.

Although the SkillWallet description references the legacy **Workflow Editor**, the automation for this project has been implemented using **Flow Designer**, which is the modern and recommended automation framework in ServiceNow. The same functional objectives—approvals, task creation, and fulfillment tracking—are successfully achieved.

Objective

To automate the processing of software installation requests by handling approvals, task creation, and request tracking without manual intervention.

Implementation Overview

The automation logic is designed around the **Requested Item (RITM)** record generated from the Service Catalog. Once a user submits a software installation request, the automation handles the request lifecycle as follows:

- Initiates approval workflow
- Creates fulfillment tasks upon approval
- Tracks request status throughout execution

- Ensures clean completion of the request process
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Steps Performed

1. Logged in to the **ServiceNow instance**.
 2. Navigated to **Workflow Studio / Flow Designer**.
 3. Created a new flow for handling **Software Installation Requests**.
 4. Configured the trigger to execute when a **Service Catalog item is requested**.
 5. Added an **approval action** to route the request for managerial or designated approval.
 6. Implemented conditional logic to evaluate approval outcomes.
 7. Configured **automatic Catalog Task creation** for the IT fulfillment team when the request is approved.
 8. Ensured request status updates and proper flow termination for both approved and rejected scenarios.
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Automation Capabilities Implemented

- **Dynamic approvals** triggered automatically on request submission
- **Automated task creation** for fulfillment teams after approval
- **Seamless fulfillment tracking** through Requested Item and Catalog Tasks
- **End-to-end automation** without manual intervention

Validation

The automation logic was tested by submitting software installation requests through the Service Catalog. The following behaviors were verified:

- Approval requests were generated automatically
- Fulfillment tasks were created only after approval
- Request status updated correctly at each stage
- Workflow executed successfully without errors

Outcome

The Automation Logic successfully enables a streamlined, automated workflow for handling software installation requests. By leveraging ServiceNow's automation capabilities, the solution reduces manual effort, improves turnaround time, and ensures consistent request processing aligned with enterprise IT service management best practices.