

Phase 3: UI/UX Development and Customization

Modules: Navigation Flow & Request Submission

1. Modules & Task Reference

Module 3: Navigation Flow

- End-user navigation from Catalog Item to Service Portal
 - Testing catalog item visibility
 - Submitting a software installation request
 - Validating request creation and notifications
-

2. Objective

The objective of this module is to:

- Validate end-to-end navigation for users
 - Ensure catalog items are accessible via Service Portal
 - Confirm successful request submission
 - Verify request and record generation in backend tables
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3. Business Requirement

From a business perspective:

- Employees must be able to easily locate and submit software requests
 - Requests must generate unique tracking numbers
 - Users should receive confirmation and notification emails
 - Navigation should be intuitive without admin intervention
-

4. Configuration Steps (High Level)

Activity 1: Testing via Catalog Item (Try It option)

Steps:

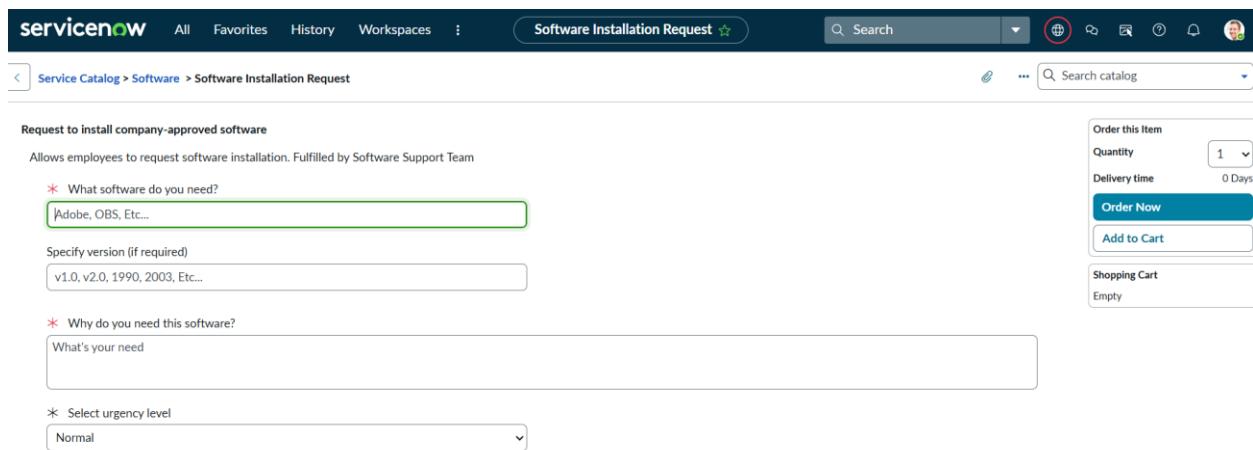
1. Login to the ServiceNow PDI

2. Navigate to the **Software Installation Request** catalog item
3. Click **Try It**
4. Verify all configured variables are visible:
 - o Software Name
 - o Version Required
 - o License Justification
 - o Urgency
5. Fill the form with valid test data
6. Click **Order Now**

Expected Result:

- Request is submitted successfully
- A confirmation screen is displayed
- A **Request Number (REQ)** and **Requested Item (RITM)** are generated

 **Screenshot:** *Software Installation Request Form(using Try It in catalog form)*



The screenshot shows the ServiceNow Software Installation Request catalog page. At the top, there's a navigation bar with links for All, Favorites, History, Workspaces, and a search bar. Below the navigation is a breadcrumb trail: Service Catalog > Software > Software Installation Request. The main content area is titled "Request to install company-approved software" and describes it as allowing employees to request software installation, fulfilled by the Software Support Team. There are three required fields: "What software do you need?" (input: Adobe, OBS, Etc...), "Specify version (if required)" (input: v1.0, v2.0, 1990, 2003, Etc...), and "Why do you need this software?" (input: What's your need). To the right, there's a sidebar titled "Order this Item" with "Quantity" set to 1 and "Delivery time" set to 0 Days. It has two buttons: "Order Now" (highlighted in blue) and "Add to Cart". Below the sidebar is a "Shopping Cart" section which is currently empty.

Activity 2: Accessing Service Portal

Corrected Procedure (Important Fixes Applied):

1. Copy your instance URL

Example:

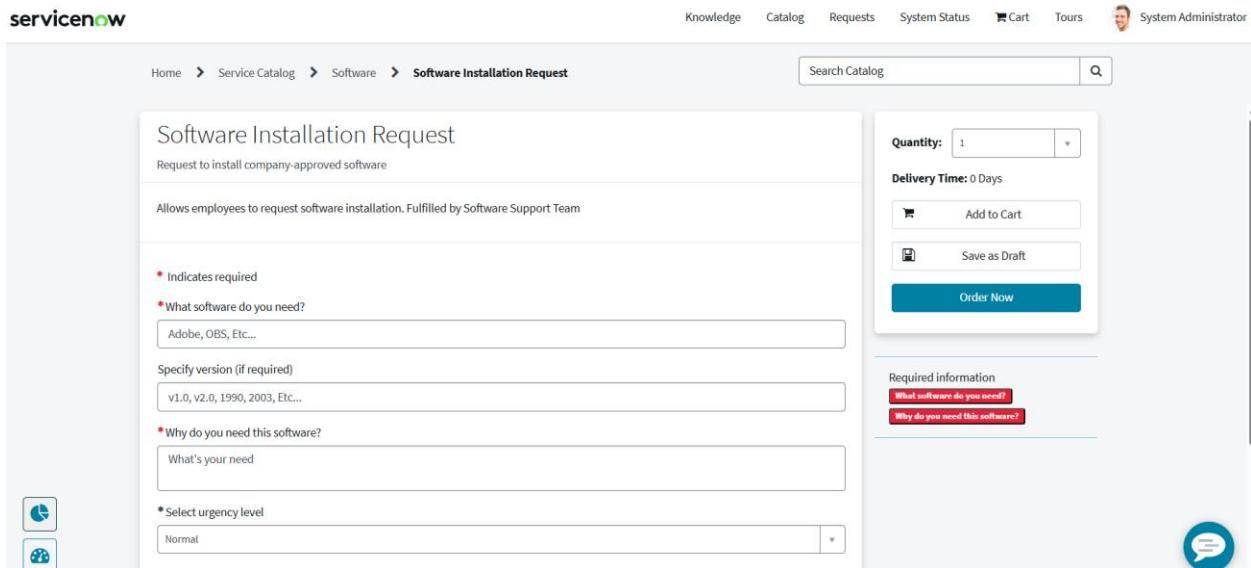
<https://dev283547.service-now.com>

2. Open a new browser tab and append /sp

<https://dev314490.service-now.com/sp>

3. This opens the **Service Portal**

 **Screenshot:** Opened the using URL



The screenshot shows the ServiceNow Service Portal interface. At the top, there's a navigation bar with links for Knowledge, Catalog, Requests, System Status, Cart, Tours, and a System Administrator profile. Below the navigation is a search bar labeled "Search Catalog". The main content area is titled "Software Installation Request" and has a subtitle "Request to install company-approved software". It includes a brief description: "Allows employees to request software installation. Fulfilled by Software Support Team". There are several input fields with validation messages: "Adobe, OBS, Etc..." (with a note "* Indicates required"), "v1.0, v2.0, 1990, 2003, Etc...", "What's your need?", "Normal" (under "Select urgency level"), and two red-highlighted required fields: "What software do you need?" and "Why do you need this software?". On the right side, there's a sidebar with "Quantity: 1", "Delivery Time: 0 Days", and buttons for "Add to Cart", "Save as Draft", and a prominent blue "Order Now" button. A small speech bubble icon is in the bottom right corner.

Activity 3: Searching and Submitting Request in Service Portal

Correction:

You should NOT search for *Network Requests* for this project.

You must search using the **Meta tag or Catalog Item name**.

Steps:

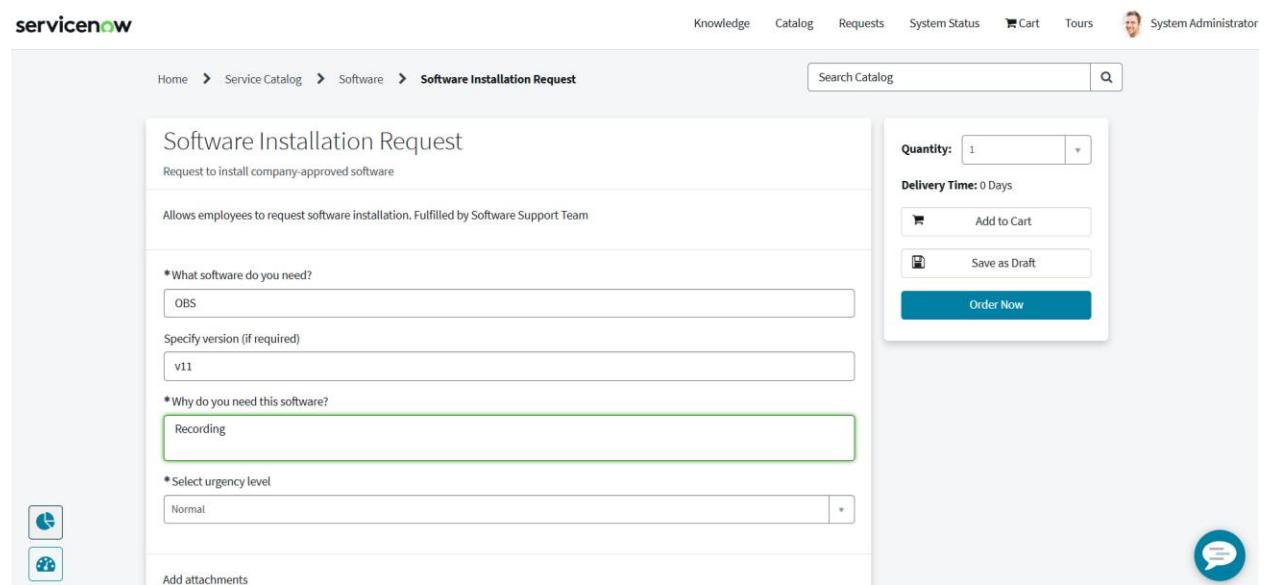
1. In Service Portal, use the search bar
2. Search for "**New Software**"
(This matches the Meta value you configured earlier)
3. Open **Software Installation Request**
4. Fill in all required fields:
 - o Software Name
 - o Version (optional)
 - o License Justification
 - o Urgency
5. Click **Order Now**
6. Click **Checkout**

7. Submit the request

Expected Result:

- Request submission completes successfully
- Order confirmation page is displayed
- Unique **REQ number** is generated
- User receives confirmation email

Screenshot: Ordering the Software



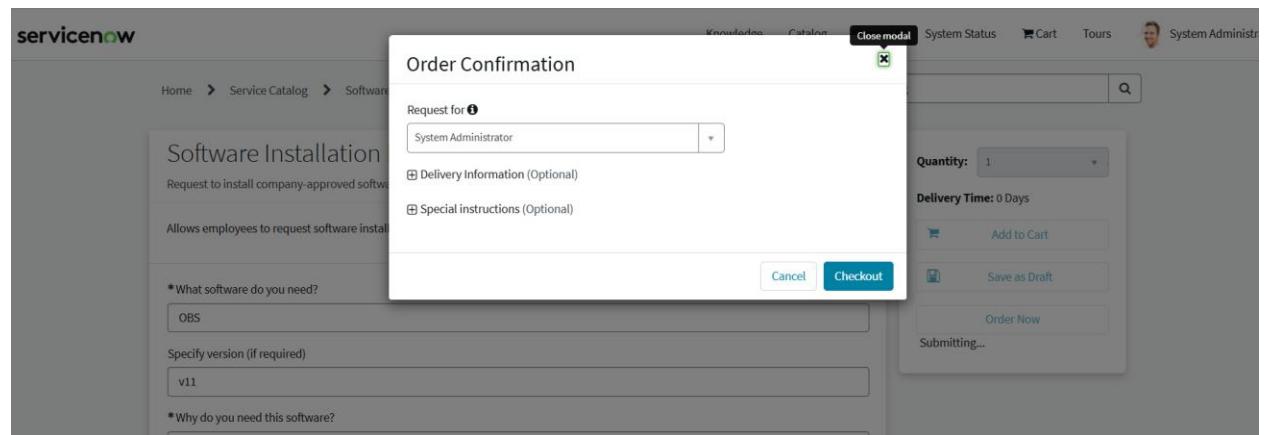
The screenshot shows the ServiceNow Software Installation Request page. The URL in the address bar is [Home > Service Catalog > Software > Software Installation Request](#). The page title is "Software Installation Request". A sub-header says "Request to install company-approved software". Below it, a note states "Allows employees to request software installation. Fulfilled by Software Support Team". The main form fields include:

- *What software do you need? (Input: OBS)
- Specify version (if required) (Input: v11)
- *Why do you need this software? (Text area: Recording)
- *Select urgency level (Dropdown: Normal)

A sidebar on the right contains:

- Quantity: 1
- Delivery Time: 0 Days
- Add to Cart
- Save as Draft
- Order Now (button, highlighted in red)

Screenshot: Order Confirmation and Approver Choosing



The screenshot shows the "Order Confirmation" modal window. The title is "Order Confirmation". The "Request for" dropdown is set to "System Administrator". The modal contains:

- Request for: System Administrator
- Delivery Information (Optional)
- Special instructions (Optional)

Below the modal, the main page shows the "Software Installation Request" form with the "Order Now" button highlighted in red. The status of the order is shown as "Submitting...".

5. Module 4: Order Number & Record Verification

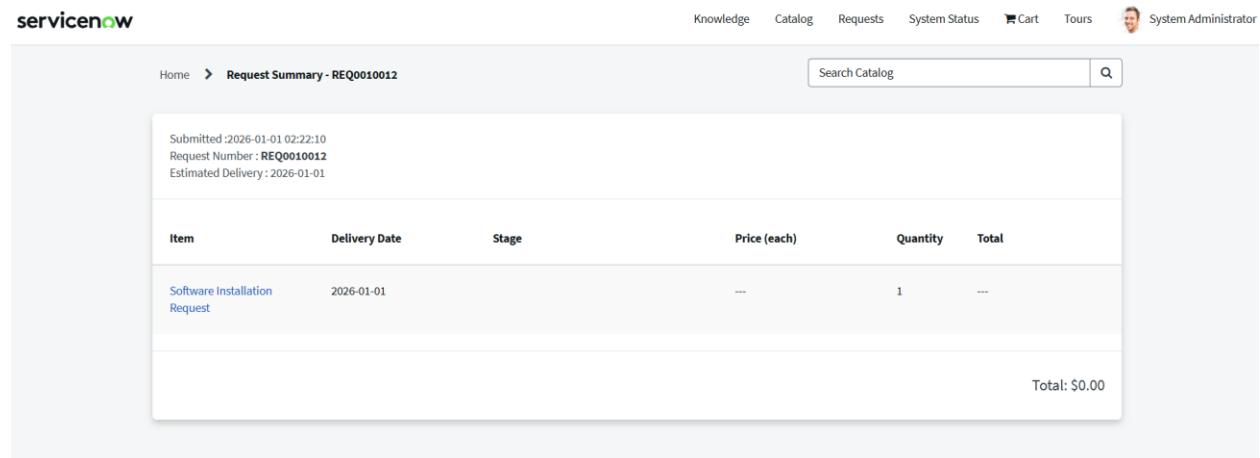
Objective

To verify that backend records are created correctly after submission.

Steps

1. After submission, note the Order Number (REQxxxx) displayed on screen
2. Navigate to:
 - o Service Catalog → Requests
3. Open the generated Request (sc_request) record
4. Verify:
 - o Request number exists
 - o Requested for user is correct
 - o Request state is updated
5. Open the related Requested Item (RITM)
6. Verify:
 - o Catalog Item = Software Installation Request
 - o All variables are populated correctly
 - o State and stage reflect workflow execution

Screenshot: Record Verification in Request Summary



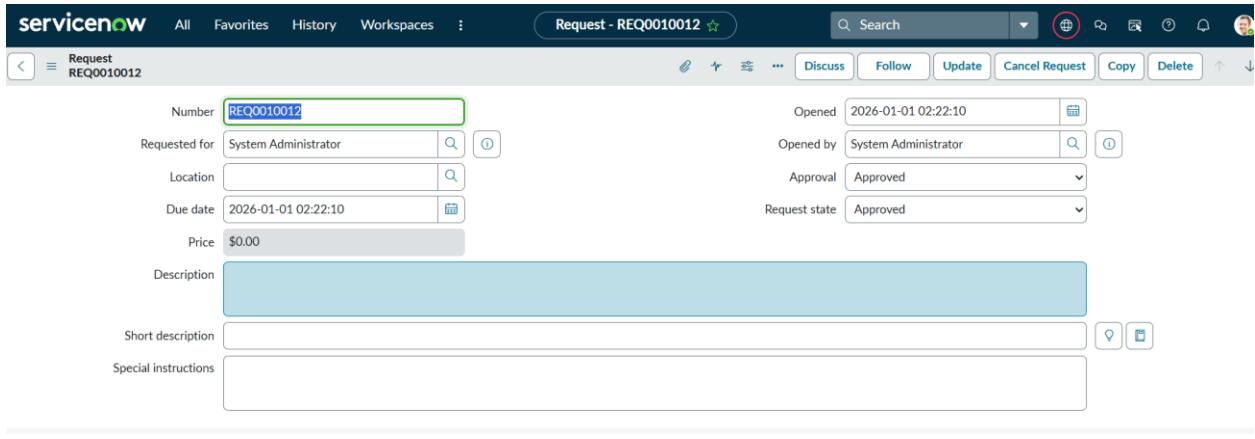
The screenshot shows the ServiceNow Request Summary page for a request with the number **REQ0010012**. The top navigation bar includes links for Knowledge, Catalog, Requests, System Status, Cart, Tours, and a System Administrator profile. The main content area displays the following information:

Submitted: 2026-01-01 02:22:10
Request Number: **REQ0010012**
Estimated Delivery: 2026-01-01

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

Total: \$0.00

Screenshot: Request Record in Request table



The screenshot shows a ServiceNow Request record interface. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and a search bar. The main title is 'Request - REQ0010012'. Below the title, there are several input fields: 'Number' (REQ0010012), 'Requested for' (System Administrator), 'Location' (empty), 'Due date' (2026-01-01 02:22:10), 'Price' (\$0.00), 'Description' (large text area), 'Short description' (empty), and 'Special instructions' (empty). Action buttons at the top right include 'Discuss', 'Follow', 'Update', 'Cancel Request', 'Copy', and 'Delete'. A red circle highlights the 'Update' button.

6. Outcome

After completing **Module 3 & Module 4**:

- Users can successfully navigate via Service Portal
- Catalog item is searchable using Meta tags
- Requests are submitted without errors
- REQ and RITM records are created correctly
- Confirmation and notification emails are triggered
- UI flow fully supports backend automation