

Phase 3: UI/UX Development and Customization

Modules: Interface Design, ToolTips and Help Text

1. Modules & Task Reference

Module 1: Interface Design

- Creation of Service Catalog Item
- Configuration of user-facing catalog variables
- Structuring a clean and intuitive request form

Module 2: Tooltip & Help Text

- Adding contextual help text and tooltips
 - Improving usability and reducing user confusion
 - Providing guidance for license-related fields
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2. Objective

The objective of Phase 3 is to design an intuitive, user-friendly Service Catalog interface that:

- Simplifies the software request process for employees
- Captures all required information accurately at submission time
- Reduces request errors through guided inputs
- Enhances user experience using tooltips and help text

This phase focuses entirely on **front-end usability and clarity**.

3. Business Requirement

From a business perspective, users should:

- Clearly understand what information is required
- Know why certain inputs (like license justification) are mandatory
- Submit complete and accurate requests on the first attempt
- Avoid follow-ups caused by missing or incorrect details

IT teams require:

- Structured, standardized request data
 - Fewer clarification cycles
 - Improved request quality from the start
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4. Configuration Details

Module 1: Service Catalog Creation & Variable Configuration

Activity 1: Creation of Service Catalog Item

Description:

A dedicated Service Catalog Item is created to allow employees to request licensed software installations.

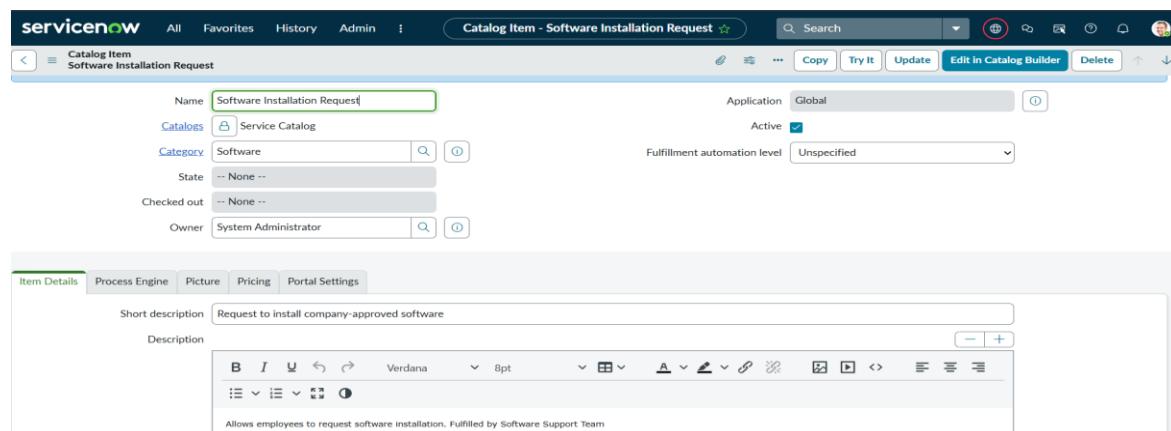
Steps:

1. Open ServiceNow
2. Click All
3. Search for Maintain Items
4. Click New
5. Fill in the catalog item details:
 - Name: *Software Installation Request*
 - Category: Software
 - Catalog: Service Catalog
6. In the Meta field, provide a meaningful tag (e.g., *New Software*) to enable easy search in Service Portal
7. Save the catalog item

Result:

A visible, searchable catalog item is available in the Service Portal

Screenshot: Catalog Item Creation



The screenshot shows the ServiceNow interface for creating a new catalog item. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Admin', and a search bar. The main title is 'Catalog Item - Software Installation Request'. The form fields include:

- Name: Software Installation Request
- Catalogs: Service Catalog
- Category: Software
- State: -- None --
- Checked out: -- None --
- Owner: System Administrator
- Application: Global
- Active: checked
- Fulfillment automation level: Unspecified

Below the form, there are tabs for 'Item Details', 'Process Engine', 'Picture', 'Pricing', and 'Portal Settings'. The 'Item Details' tab is active, showing:

- Short description: Request to install company-approved software
- Description: A rich text editor containing the text: Allows employees to request software installation. Fulfilled by Software Support Team.

Activity 2: Variable Configuration

Description:

Variables are configured to capture essential details required for software installation and approval.

Steps:

1. Open the created catalog item
2. Scroll down to the Variables related list
3. Click New and create the following variables:

Variable 1: Software Name

- **Type:** Single Line Text
- **Question:** *What software do you need?*
- **Purpose:** Identifies the requested software

Variable 2: Version Required

- **Type:** Single Line Text
- **Question:** *Specify version (if required).*
- **Purpose:** Captures version-specific requests

Variable 3: License Justification

- **Type:** Multi Line Text
- **Question:** *Why do you need this software?*
- **Purpose:** Helps approvers validate business justification

Variable 4: Urgency

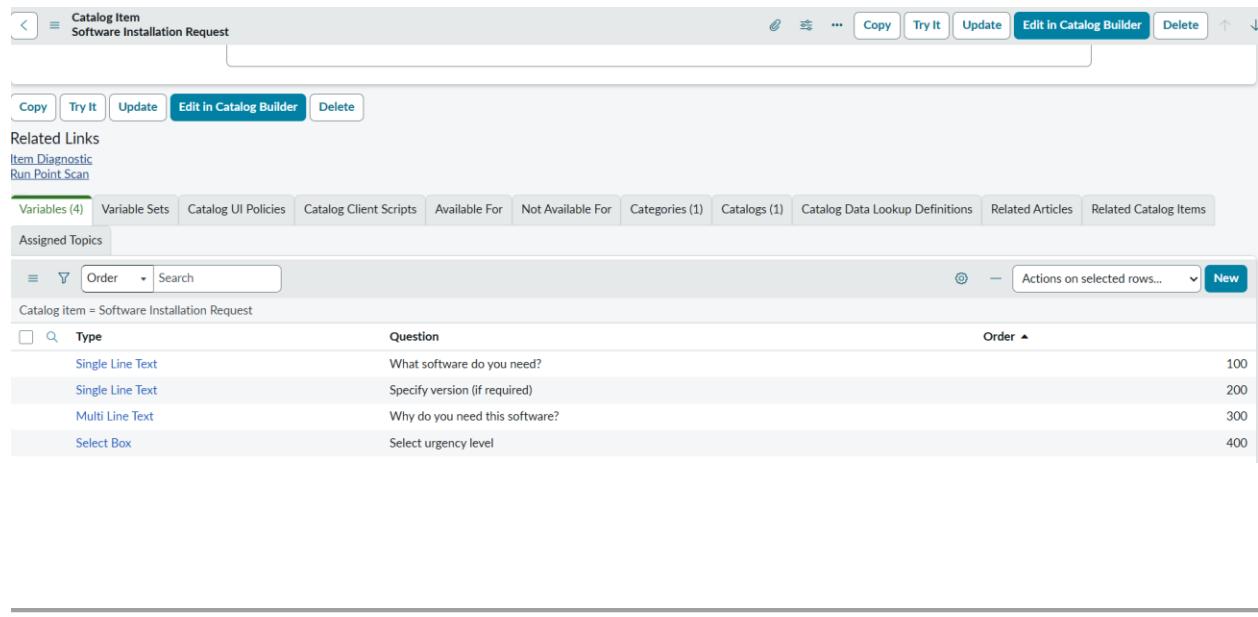
- **Type:** Choice
- **Question:** *Select urgency level.*
- **Choices:**
 - Normal
 - High
 - Critical
- **Purpose:** Prioritization of request fulfillment

4. Click Save after creating all variables

Result:

A structured, easy-to-complete request form is available to users

Screenshot: Variable Configuration



The screenshot shows the Oracle Catalog Item Variable Configuration page for a "Software Installation Request". The top navigation bar includes "Catalog Item", "Edit in Catalog Builder", and "Delete" buttons. Below the navigation is a toolbar with "Copy", "Try It", "Update", "Edit in Catalog Builder", and "Delete" buttons. A "Related Links" section lists "Item Diagnostic" and "Run Point Scan". A "Variables (4)" tab is selected, showing a table of configuration items:

Type	Question	Order
Single Line Text	What software do you need?	100
Single Line Text	Specify version (if required)	200
Multi Line Text	Why do you need this software?	300
Select Box	Select urgency level	400

Module 2: Tooltip and Help Text Configuration

Objective

To guide users while filling the form and reduce errors by providing contextual explanations.

Description

Tooltip / Help Text icons are added next to fields such as **Users who have license** or license-related inputs to explain:

- When a license is required
- What to do if a license is unavailable
- How the request will be handled in such cases

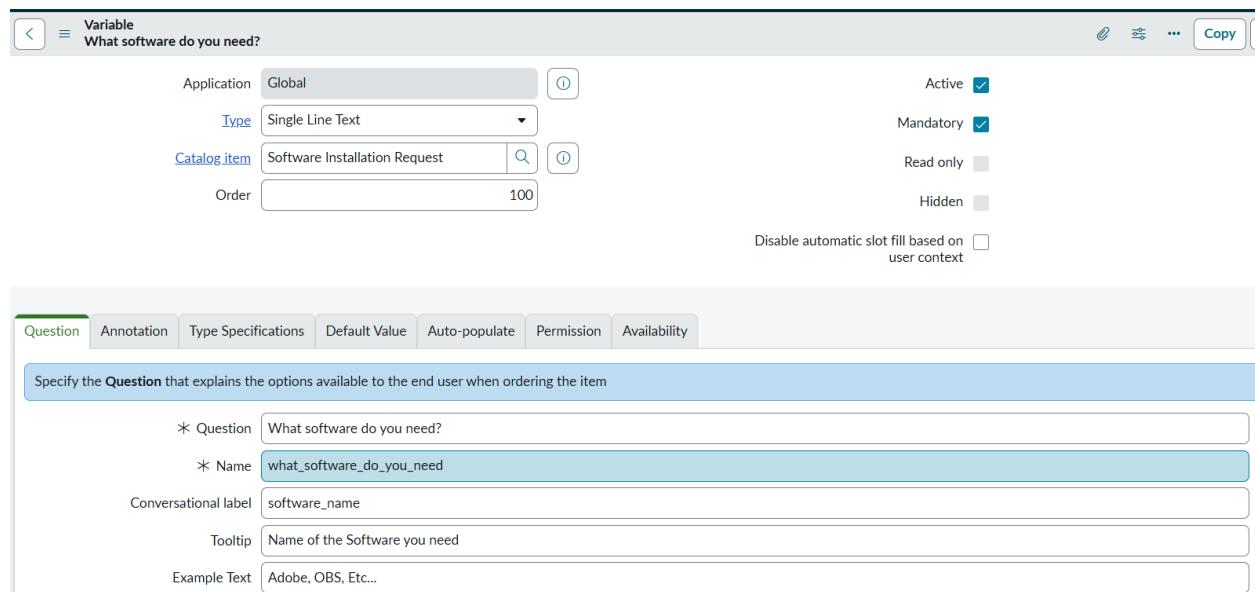
Implementation Approach

- Use the **Tooltip** field in the Variable form
- Add concise, descriptive guidance text
- Display info icons next to relevant fields in the catalog form

Result

- Users understand the impact of their selections
- Fewer incorrect submissions
- Improved request quality and approval speed

Screenshot: Tooltip and Example Text



The screenshot shows the ServiceNow Variable form configuration for a catalog item named "Software Installation Request".

Variable Details:

- Application: Global
- Type: Single Line Text
- Catalog item: Software Installation Request
- Order: 100
- Active: checked
- Mandatory: checked
- Read only: unchecked
- Hidden: unchecked
- Disable automatic slot fill based on user context: unchecked

Question Configuration:

- Question: What software do you need?
- Name: what_software_do_you_need
- Conversational label: software_name
- Tooltip: Name of the Software you need
- Example Text: Adobe, OBS, Etc...

5. Outcome

After completing Phase 3 (Module 1 & 2):

- A user-friendly Service Catalog item is available
- All required request details are captured accurately
- Users are guided through tooltips and help text
- Request errors and rework are reduced
- Approval and fulfillment teams receive clean, structured data

Phase 3 significantly improves **end-user experience**, ensuring that backend automation built in earlier phases works effectively.