

Laptop request catalog

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Team Members: 4

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Problem Statement: To address delays and inefficiencies, a ServiceNow Laptop Request Catalog Item is required to standardize and automate laptop requests and fulfillment

Objective: The objective of this project is to simplify the laptop request process by implementing a standardized catalog item in ServiceNow, automate approval workflows, improve fulfillment efficiency, and enhance tracking and asset management

Skills: The project team must possess skills in ServiceNow catalog configuration, workflow automation, scripting, ITSM processes, asset management, and effective stakeholder communication."

TASK INITIATION

Milestone 1 : Update set

Activity 1: Create Local Update set

1. Open service now
2. Click on All >>search for update sets

3. Click on new
4. Fill the following details to create a update set as: "Laptop Request"
5. Click on submit and make current
6. By clicking on the button it activates the update set

The screenshot shows the ServiceNow interface for creating a new update set. The breadcrumb trail is 'Update Set - Create Laptop Request Project 2'. The form fields are as follows:

- Name: Laptop Request Project
- State: In progress
- Parent: (empty)
- Release date: (empty)
- Description: (empty)

The 'Submit and Make Current' button is highlighted with a red box. The left sidebar shows the 'Local Update Sets' section under 'System Update Sets'.

NOTE: Perform all actions under this newly created update set only.

Milestone 2 : Service Catalog Item

Activity 1: Create Service Catalog Item

1. Open service now.

2. Click on All >> service catalog
3. Select maintain items under catalog definitions
4. Click on New.

The screenshot shows the ServiceNow interface for managing catalog items. The left sidebar contains a navigation menu with the following items: Catalog, Open Records, Requests, Items, Tasks, Catalog Definitions (highlighted), My Catalogs, My Categories, My Items, Maintain Catalogs, Maintain Categories, Renderers, Maintain Dynamic Categories, Maintain Items (highlighted), My Content Items, Content Items, Ordered Item Links, My Order Guides, Order Guides, My Record Producers, Record Producers, and Composite Record Producers. The main area displays a table of catalog items with the following columns: Name, Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated. The table contains 12 rows of data, including items like '3M Privacy Filter - Lenovo X1 Carbon', '401(k) Plan Enrollment', and 'Adobe Acrobat'. A 'New' button is located in the top right corner of the main area.

Name	Short description	Active	Roles	Catalogs	Category	Price	Type	Updated
3M Privacy Filter - Lenovo X1 Carbon	Privacy Filter - X1 Carbon	true		Service Catalog	Peripherals	\$43.19	Item	2022-11-20 20:46:33
3M Privacy Filter - MacBook Pro	Privacy Filter	true		Service Catalog	Peripherals	\$42.23	Item	2022-11-20 20:46:33
3M Privacy Filter - MacBook Pro Retina	Privacy Filter	true		Service Catalog	Peripherals	\$40.31	Item	2022-11-20 16:00:00
401(k) Plan Enrollment	Enroll in or modify your 401(k) plan	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-08-18 10:52:30
401(k) Plan Enrollment Inquiry	Ask a question about your retirement pla...	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-05-20 17:59:56
401(k) Retirement Plan Inquiry	Ask a question about your existing plan	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-05-20 17:59:55
Access	Microsoft Access	true		Service Catalog	Software	\$139.99	Item	2022-11-20 20:46:33
Acrobat	Adobe Acrobat	true		Service Catalog	Software	\$139.99	Item	2022-12-05 20:46:33
Add Beneficiaries	Add or modify your beneficiaries	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-06-13 16:48:57
Add network switch to datacenter cabinet	This standard change template describes ...	true		Service Catalog	Network Standard Changes	\$0.00	Item	2024-10-21 07:20:03
Add/Remove users from group	Add/Remove users from group	true		Service Catalog	Services	\$0.00	Item	2022-12-05 10:17:33
Adobe Acrobat Pro	Create, edit or convert PDF	true		Service Catalog	Software	\$139.99	Item	2022-12-05

1. Fill the following details to create a new catalog item

ServiceNow

maintain |

Favorites History Workspaces Admin

Catalog Item - Laptop Request

Application scope: Global
Update set: Laptop Request Project [Global]

Copy Insert Insert and Stay Save Try It! Update Edit in Catalog Builder Delete

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: Laptop Request

Application: Global

Catalog: Service Catalog

Category: Hardware

State: -- None --

Checked-out: -- None --

Owner: System Administrator

Active: ☒

Fulfillment automation level: Unspecified

Item Details Process Engine Picture Pricing Portal Settings

Short description: Use this item to request a new laptop

Description

B I U L R Verdana 10pt

6. Click on 'SAVE'

Activity 2: Add variables

Step1:

- After saving the catalog item form scroll down and click on variable(related list)
- Click on new and enter the details as below

1. Variable 1:Laptop Model

Type: Single line text

Name: laptop_model

Order:100

- Click on submit
- Again click on new and add Remaining variables in the above process

ServiceNow Variable - New Record form. Fields include Application (Global), Type (Single Line Text), Catalog Item (Laptop Request), Order (100), Active (checked), Mandatory (unchecked), Read only (unchecked), and Hidden (unchecked). The Question tab is active, showing a question text area with the text 'Specify the Question that explains the options available to the end user when ordering the item'. The Question and Name fields are highlighted with red boxes. The Name field contains the text 'laptop_model'.

2. Variable 2:Justification

Type: Multi line text

Name: justification

Order:200

3. Variable 3:Additional Accessories

Type: Checkbox

Name: additional_accessories

Order:300

4. Variable 4: Accessories Details

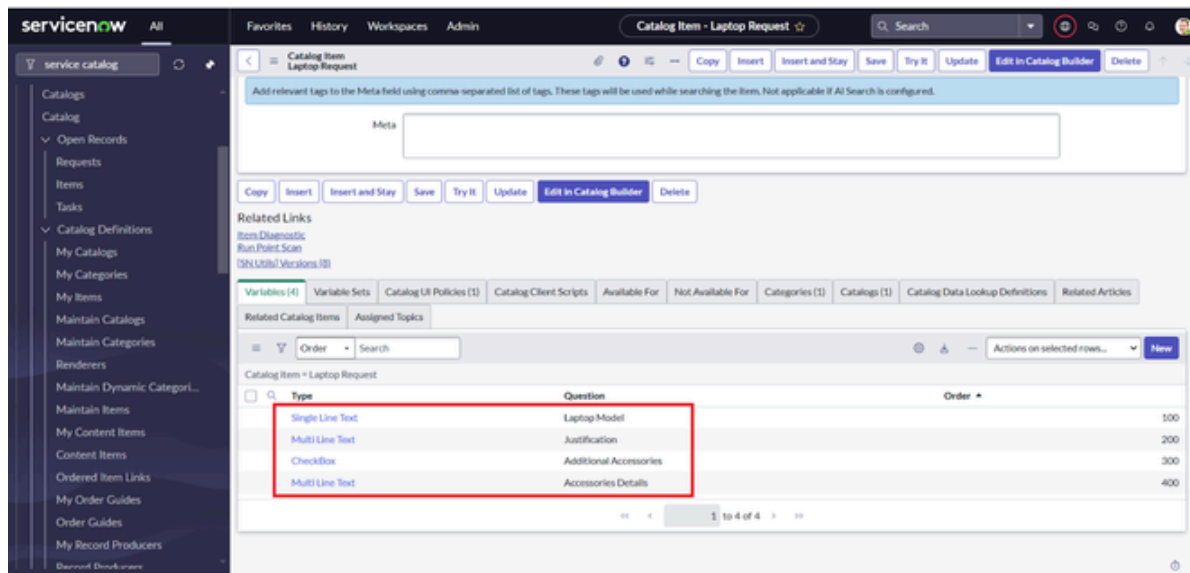
Type: Multi line text

Name:accessories_details

Order:400

Step1

- After adding above variable which are added to newly created catalog item
- Then save the catalog item form

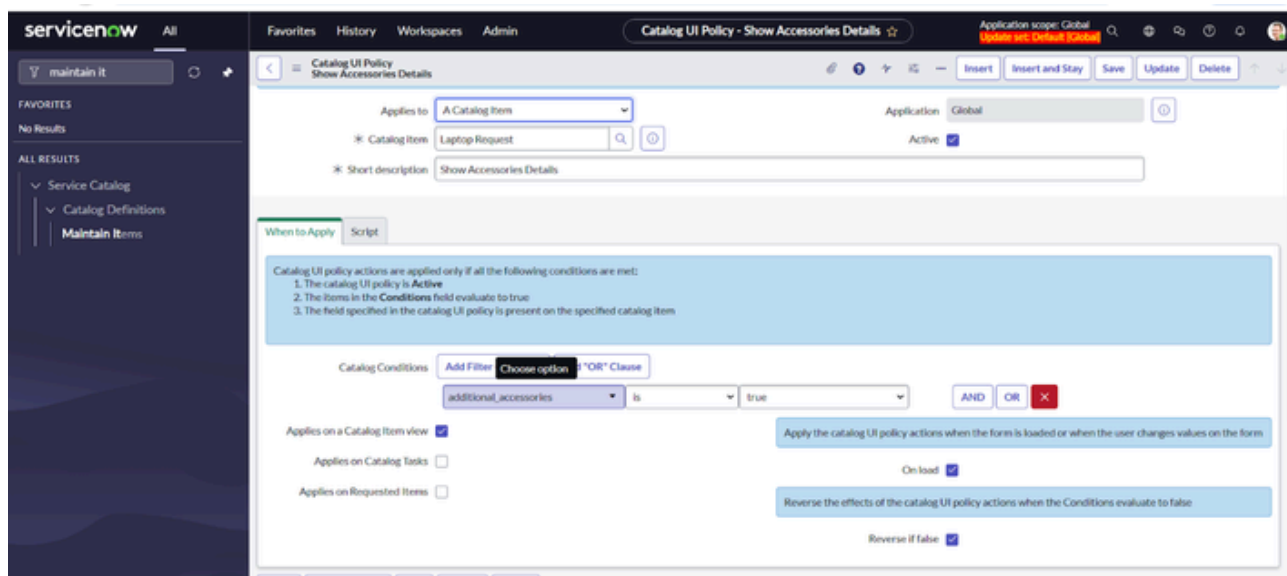


Milestone 3 : UI Policy

Activity 1: Create Catalog Ui policies

1. Click on all>> search for service catalog
2. Select maintain item under catalog definition
3. Select 'laptop request' and scroll down click on "Catalog Ui policies"
4. In the catalog ui policies related list tab click on new
5. Give short description as: show accessories details
6. Set the Catalog Condition in the related list tab 'when to apply'

[field: additional_ accessories, operator: is, value: true]



7. Click on **save**.

8. Then click on new button

9. Select variable name as: accessories_details

Order:100

Mandatory: True

Visible : True

10. Click on save and again click save button of the catalog ui policy form

The screenshot shows the 'Catalog UI Policy Action' configuration page in ServiceNow. The left sidebar contains navigation links for 'service catalog', 'Request Overview', 'Catalogs', 'Open Records', 'Requests', 'Items', 'Tasks', 'Catalog Definitions', 'My Catalogs', 'My Categories', 'My Items', 'Maintain Catalogs', 'Maintain Categories', 'Renderers', 'Maintain Dynamic Categories', 'Maintain Items', and 'My Content Items'. The main area is titled 'Catalog UI Policy Action - accessories_details'. It includes a description: 'UI policy actions specify exactly what actions to take on a specified field. The conditions specified in the UI policy determine when these actions are triggered. [More info](#)'. The configuration fields are: 'Catalog item' (Laptop Request), 'Variable name' (accessories_details), 'Order' (100), 'Application' (Global), 'Mandatory' (True), 'Visible' (True), 'Read only' (Leave alone), 'Value action' (Leave alone), and 'Field message type' (None). At the bottom, there are buttons for 'Insert', 'Insert and Stay', 'Save', 'Update', and 'Delete'. The 'Save' button is highlighted with a red box. Below the buttons are 'Related Links' for 'Run Point Scan' and 'ISN Utils / Workflows (1)'.

The screenshot shows the 'Catalog UI Policy' configuration page in ServiceNow. The left sidebar is the same as the previous screenshot. The main area is titled 'Catalog UI Policy - Show Accessories Details'. It includes a description: 'Catalog UI policies are similar to standard UI policies. Catalog UI policies dynamically change variables that are part of a catalog item or change how variable sets are handled. Policies can also be applied when the variables are present in a field. [More info](#)'. The configuration fields are: 'Apply to' (A Catalog Item), 'Application' (Global), 'Active' (checked), and 'Short description' (Show Accessories Details). Below these are 'When to Apply' and 'Script' sections. The 'When to Apply' section has a 'Script' tab with the following conditions: 'Catalog Conditions' (additional_accessories is True), 'AND/OR' (AND), and 'Reverse If False' (checked). The 'Script' tab has a 'Script' field with the following text: 'Catalog UI policy actions are applied only if all the following conditions are met: 1. The catalog UI policy is Active. 2. The items in the Conditions field evaluate to true. 3. The field specified in the catalog UI policy is present on the specified catalog item.' Below the conditions are checkboxes for 'Applies on a Catalog item view' (checked), 'Applies on Catalog tasks' (unchecked), and 'Applies on Requested items' (unchecked). At the bottom, there are buttons for 'Insert', 'Insert and Stay', 'Save', 'Update', and 'Delete'. The 'Save' button is highlighted with a red box. Below the buttons are 'Related Links' for 'Run Point Scan' and 'ISN Utils / Workflows (1)'. At the bottom of the page, there is a table titled 'Catalog UI Policy Actions' with columns: 'Name', 'Read only', 'Mandatory', 'Visible', and 'Order'. The table contains one row: 'accessories_details', 'Leave alone', 'True', 'True', and '100'.

Milestone 4: UI Action

Activity 1: Create ui action

1. Open service now.
2. Click on All >> search for ui action
3. Click on new
4. Fill the following details to create ui action

Table: shopping cart(sc_cart) Order:100 Action name: Reset form
Client : checked

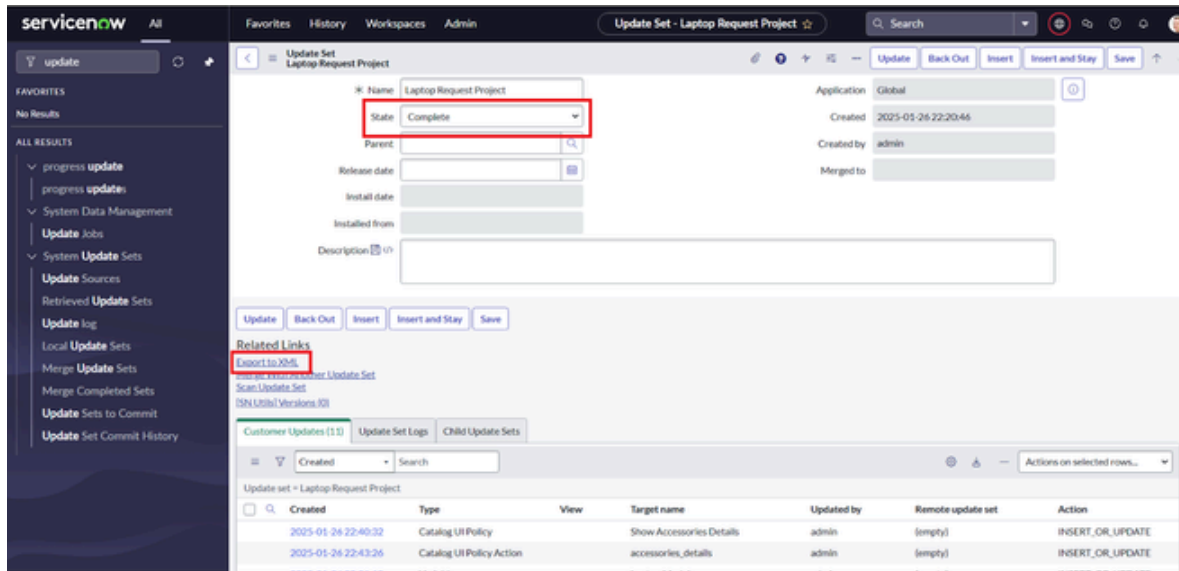
Script: `function resetForm() { g_form.clearForm(); // Clears all fields in the form alert("The form has been reset.");}`Click on save

The screenshot shows the ServiceNow 'UI Action - Reset Form' configuration page. The left sidebar contains a navigation menu with 'UI Action' selected. The main content area is divided into two columns. The left column contains a form with the following fields: 'Name' (Reset Form), 'Table' (Shopping Cart [sc_cart]), 'Order' (100), and 'Action name' (Reset Form). Below these are checkboxes for 'Active', 'Show insert', 'Show update', 'Client' (checked), 'List v2 Compatible', and 'List v3 Compatible'. The right column contains a 'Messages' section with a text area, a 'Comments' section with a text area, and a 'Hint' section with a text area. The 'Save' button is highlighted with a red box.

Milestone 5 : Export Update set

Activity 1: Exporting changes to another instances

1. Click on All >> search for update sets
2. Select created update set i.e. 'Laptop Request Project'
3. Set the state to 'Complete'
4. In the related list Update tab, updates are visible which we perform under this update set.
5. Click on export to XML ,it download one file



Milestone 6: Login to another Instance

Activity 1: Retrieving the update set

1. Click on all>> search for update sets
2. Select "Retrieved update set" under system update set
3. It open retrieved update set list and scroll down
4. Click on Import update set from XML

Name	Application	State	Update source	Description	Loaded	Committed	Parent	Remote Batch Base
first update set	Global	Previewed	sandeep		03:00:03	(empty)	(empty)	(empty)
first update set 2	Global	Previewed	sandeep		2024-08-30 03:00:07	(empty)	(empty)	(empty)
Migration of 'AI Search Profile', 'AI Se...	Advanced AI Search Management Tools	Loaded	(empty)	Automatically created by the migration s...	2023-06-30 15:09:18	(empty)	(empty)	(empty)
program	Global	Previewed	sandeep		2024-08-30 03:00:03	(empty)	(empty)	(empty)
project	Global	Committed	sandeep		2024-08-30 03:00:05	2024-08-30 03:01:03	(empty)	(empty)
Rathan's Snow	Global	Loaded	(empty)	Testing purpose	2024-07-10 23:32:45	(empty)	(empty)	(empty)
second	Global	Previewed	sandeep		2024-08-30 03:00:01	(empty)	(empty)	(empty)
sunny	Global	Previewed	sandeep		2024-08-30 03:00:02	(empty)	(empty)	(empty)
sunny guja	Global	Previewed	sandeep		2024-08-30 03:00:00	(empty)	(empty)	(empty)

Related Links
[Import Update Set from XML](#)

5. Upload the downloaded file in XML file

6. Click on Upload and it gets uploaded.

Import XML

Importing records from an XML file will not run Business Rules

Step 1: Choose file to upload

XML file sys_remote_u...fcaad3be.xml

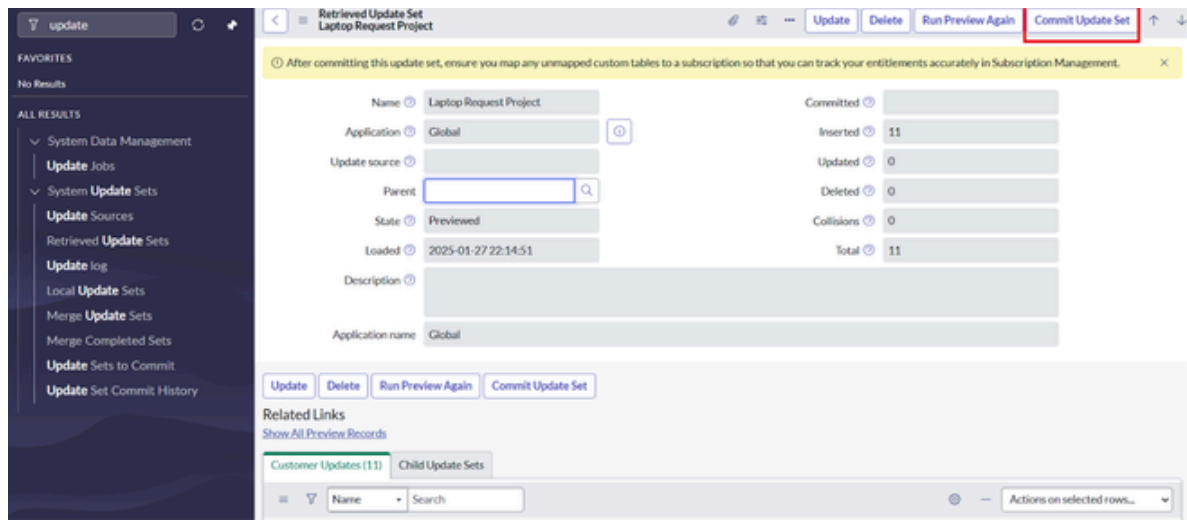
Step 2: Upload the file

7. Click on preview update set

8. And click on commit update set

9. And also see the related tab updates

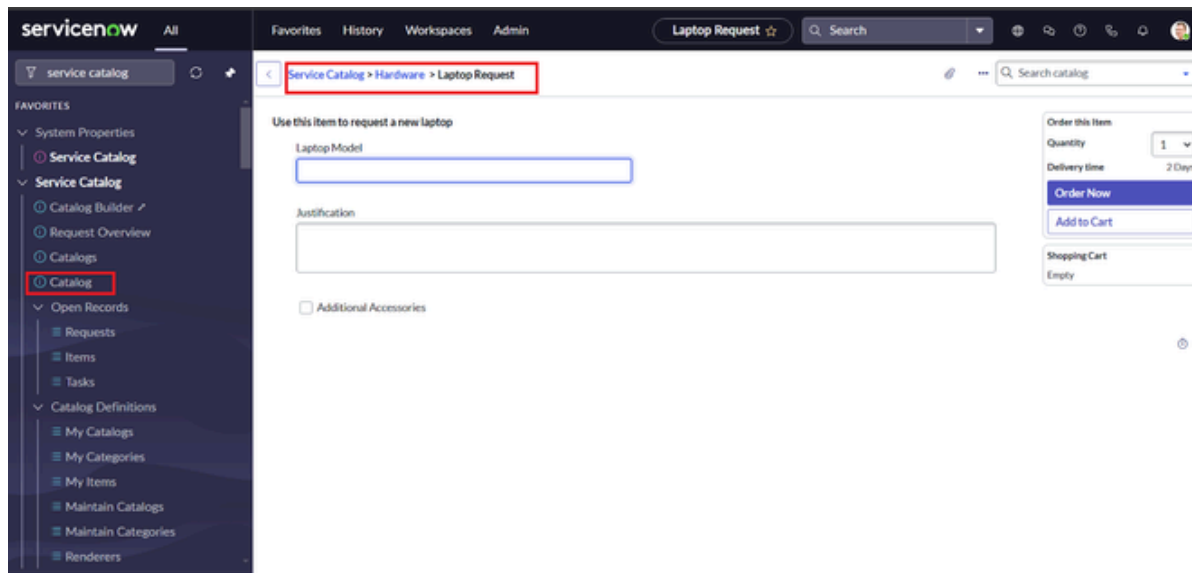
10. After committing update set in this instance we get all updates which are done in the previous instance



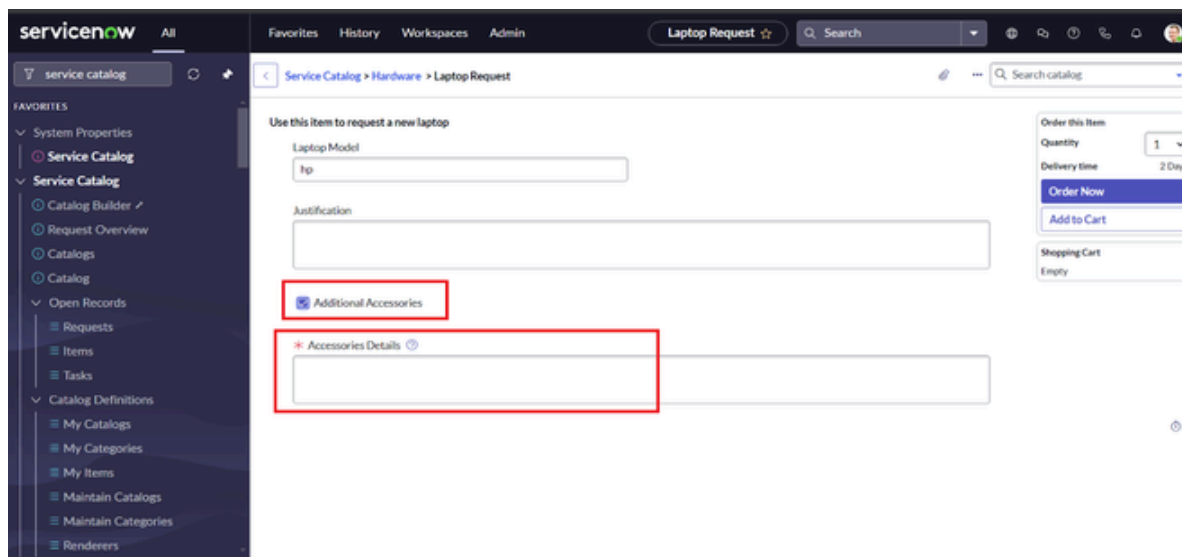
Milestone 6: Testing

Activity 1: Test Catalog Item

1. Search for service catalog in application navigator in target instance
2. Select hardware category and search for 'laptop request' item
3. Select laptop request item and open it
4. It shows three variables only



5.Now see the results,it fulfills our requirements



Conclusion :

The Laptop Request Catalog Item project successfully streamlines the process of requesting laptops within the organization by leveraging ServiceNow's Service Catalog capabilities. Through the implementation of a dynamic catalog item, the project ensures that users have an intuitive and user-friendly interface, reducing errors and improving

efficiency. This project demonstrates how ServiceNow can be used to replace manual, error-prone processes with automated, efficient, and user-centric solutions. It not only improves service delivery but also enhances employee satisfaction by providing a modern and streamlined request experience.