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Approved by AICTE, New Delhi and Affiliated to
Anna University, Chennai



Subject Name : ServiceNow Administrator (NM1051)
(Under Naan Mudhalvan Scheme)

Project Title : Calculating Family Expenses using ServiceNow

Team ID:

Team Members:

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Laptop Request Catalog Item

Problem Statement:

Employees in the organization need a quick and efficient way to request laptops for work. The current process is manual and prone to delays, with no dynamic form behavior to guide users or ensure accurate data collection. To address this, a Service Catalog item needs to be created, allowing users to easily request a laptop, with dynamic fields, clear instructions, and additional functionality like resetting the form if needed. The solution should also ensure all changes are tracked for governance and deployment.

Objectives:

- Develop a **Laptop Request Catalog Item** in the ServiceNow instance for end users.
- Configure **catalog variables** to capture user inputs (laptop model, purpose, delivery location, etc.).
- Implement **approval and fulfillment workflows** using **Flow Designer**.
- Integrate with **Asset Management** for automatic asset assignment and tracking.
- Ensure a **user-friendly interface** using UI policies and client scripts.
- Generate **notifications** for approvals, fulfillment, and closure stages.
- Improve operational efficiency and reduce request processing time.

Skills:

- Service Catalog Configuration
- Catalog Items, Variable Sets, and Record Producers
- Flow Designer / Workflow Editor
- Catalog UI Policies and Client ScriptsNotifications and Approvals Configuration
- Integration with Asset Management and CMDB
- Request (REQ), Request Item (RITM), and Task (TASK) Management
- Service Portal and Employee Center customization

Steps to Setting up:

Setting up ServiceNow Instance

- Sign up for a developer account on the ServiceNow Developer site "<https://developer.servicenow.com>".
- Once logged in, navigate to the "Personal Developer Instance" section.
- Click on "Request Instance" to create a new ServiceNow instance.
- Fill out the required information and submit the request.
- You'll receive an email with the instance details once

it's ready.

- Log in to your ServiceNow instance using the provided credentials.

Now you will navigate to the ServiceNow.

Update set:

Create Local Update set:

1. Open service now.
2. Click on All >> search for update sets
3. Select local update sets under system update sets
4. Click on new
5. Fill the following details to create a update set as:
“Laptop Request”
6. Click on submit and make current
7. By clicking on the button it activates the update set

Note:

Perform all actions under this newly created update set only.

The screenshot shows the ServiceNow interface for creating an update set. The left sidebar is titled 'All' and contains sections for Favorites, History, Workspaces, Admin, and 'Update Sets'. Under 'Update Sets', 'Local Update Sets' is highlighted with a red box. The main content area is titled 'Update Set - Create Laptop Request Project 2'. It has fields for Name (Laptop Request Project), State (In progress), Parent, Release date, and Description. At the bottom, there are 'Submit', 'Save', and 'Submit and Make Current' buttons. The 'Submit and Make Current' button is highlighted with a red box.

Service Catalog Item:

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 is titled 'All' and contains sections for Catalog, Requests, Items, Tasks, Catalog Definitions, My Catalogs, My Categories, My Items, Maintain Catalogs, Maintain Categories, Renderers, Maintain Dynamic Categori..., and Composite Record Producers. 'Catalog Definitions' and 'Maintain Items' are highlighted with red boxes. The main content area is titled 'Catalog Items' and shows a list of items with columns for Name, Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated. A 'New' button is located at the top right of the list view. The 'New' button is highlighted with a red box.

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

Name: Laptop Request

Catalog: service Catalog

Category: Hardware

Short Description: Use this item to request a new laptop

6. Click on ‘SAVE’

The screenshot shows the ServiceNow interface for creating a new catalog item. The left sidebar shows 'FAVORITES' and 'ALL RESULTS' sections. The main area is titled 'Catalog Item - Laptop Request'. The top navigation bar includes 'Favorites', 'History', 'Workspaces', 'Admin', 'Catalog scope: Global', 'Update set: Laptop Request Project [Global]', and various action buttons like 'Copy', 'Insert', 'Save', 'Try It', 'Update', 'Edit in Catalog Builder', and 'Delete'. A note at the top says: '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.' It lists two required fields: 'Enter a Name and Short description to display for the item.' The 'Name' field is filled with 'Laptop Request'. The 'Catalog' dropdown is set to 'Service Catalog'. The 'Category' dropdown is set to 'Hardware'. The 'Active' checkbox is checked. The 'Fulfillment automation level' is set to 'Unspecified'. In the 'Item Details' tab, the 'Short description' field contains 'Use this item to request a new laptop'. Below it is a rich text editor with various formatting options.

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

The screenshot shows the ServiceNow interface for creating a new variable. The left sidebar is titled 'service catalog' and lists various catalog items and definitions. The main area is titled 'Variable - New Record'. The 'Type' field is set to 'Single Line Text', which is highlighted with a red box. The 'Name' field contains 'laptop_model', also highlighted with a red box. The 'Question' field contains 'Laptop Model'. The 'Save' button is visible at the bottom.

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

Step2:

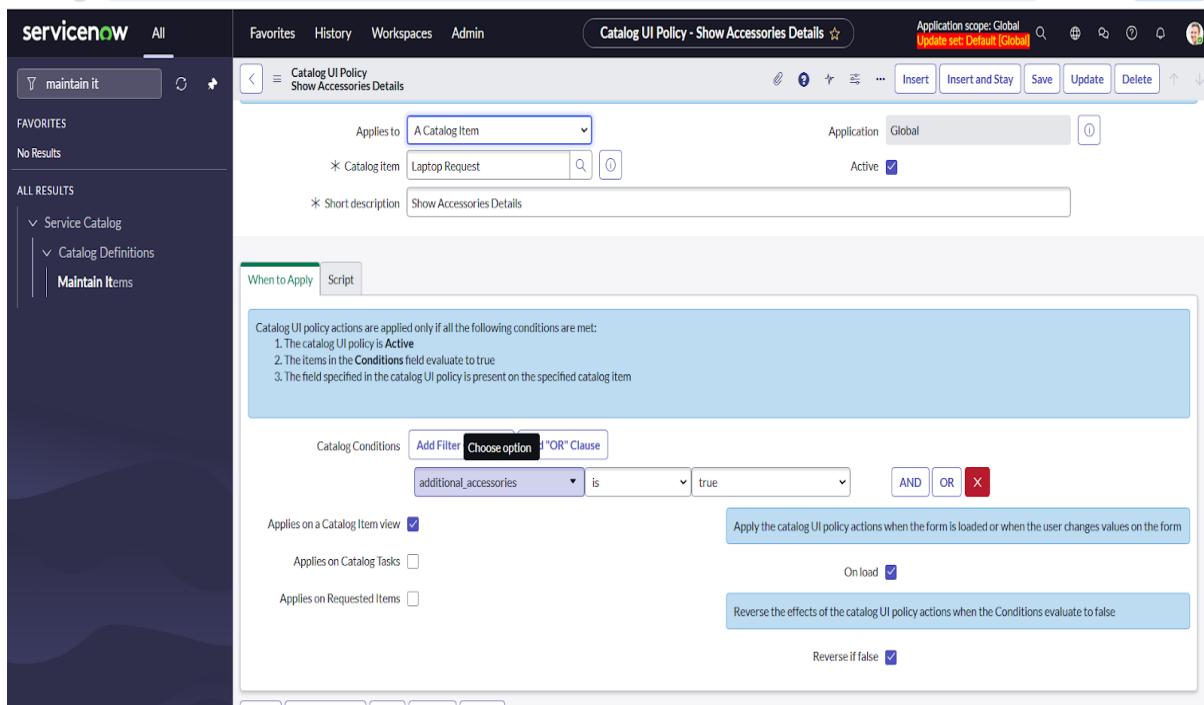
- After adding above variable which are added to newly created catalog item
- Then save the catalog item form

The screenshot shows the ServiceNow interface for managing catalog items. On the left, the navigation bar includes 'Catalogs', 'Catalog', 'Open Records', 'Requests', 'Items', 'Tasks', 'Catalog Definitions', 'My Catalogs', 'My Categories', 'My Items', 'Maintain Catalogs', 'Maintain Categories', 'Renderers', 'Maintain Dynamic Categori...', 'Maintain Items', 'My Content Items', 'Content Items', 'Ordered Item Links', 'My Order Guides', 'Order Guides', and 'My Record Producers'. The main content area is titled 'Catalog Item - Laptop Request'. It features a 'Meta' field for adding relevant tags. Below it are buttons for 'Copy', 'Insert', 'Insert and Stay', 'Save', 'Try It', 'Update', 'Edit in Catalog Builder' (which is highlighted in blue), and 'Delete'. A 'Related Links' section includes 'Item Diagnostic', 'Run Point Scan', and '[SNUtils] Versions (8)'. The 'Variables' tab is selected in the 'Catalog Item' ribbon, showing four variables: 'Single Line Text' (Type: Single Line Text, Question: Laptop Model, Order: 100), 'Multi Line Text' (Type: Multi Line Text, Question: Justification, Order: 200), 'CheckBox' (Type: CheckBox, Question: Additional Accessories, Order: 300), and 'Multi Line Text' (Type: Multi Line Text, Question: Accessories Details, Order: 400). The entire 'Variables' table is highlighted with a red border.

UI Policy:

Create Catalog Ui policies

1. Click on all>> search for service catalog
2. Select maintain item under catalog definition
3. Search for ‘laptop request’ which is created before
4. Select ‘laptop request’ and scroll down click on “Catalog Ui policies”
5. In the catalog ui policies related list tab click on new
6. Give short description as: show accessories details
7. Set the Catalog Condition in the related list tab ‘when to apply’
[field: additional_ accessories, operator: is, value: true]



8. Click on **save**.(do not click on submit)
9. Scroll down and select ‘catalog ui action’
10. Then click on new button
11. Select variable name as: accessories_details

Order:100

Mandatory: True

Visible : True

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

Catalog UI Policy Action - accessories_details

Variable name: accessories_details

Mandatory: True

Visible: True

Save

Catalog UI Policy - Show Accessories Details

Applies to: A Catalog Item

Catalog Item: Laptop Request

Short description: Show Accessories Details

When to Apply: Script

Catalog Conditions: additional_accessories = true

Actions on selected rows... New

Name	Read only	Mandatory	Visible	Order
accessories_details	Leave alone	True	True	100

UI Action:

Create ui action

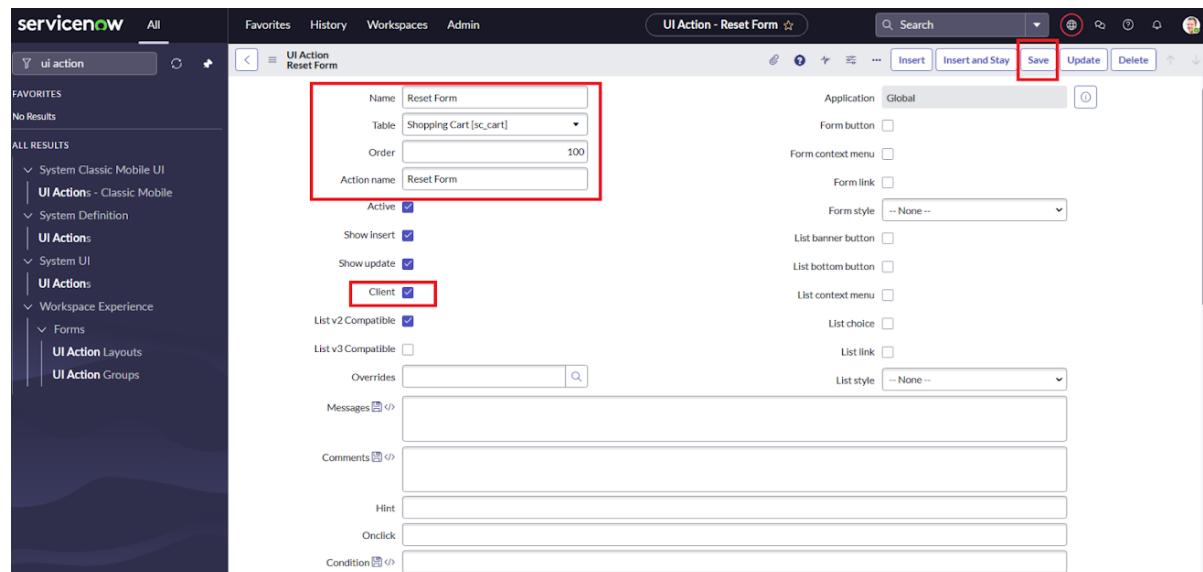
1. Open service now.
2. Click on All >> search for ui action
3. Select ui actions under system definition
4. Click on new
5. Fill the following details to create ui action

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

Script:

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

Click on save



Export Update set:

Exporting changes to another instances:

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

The screenshot shows the ServiceNow interface for managing update sets. On the left, the navigation bar includes 'Favorites', 'History', 'Workspaces', and 'Admin'. The main area is titled 'Update Set - Laptop Request Project'. The 'Name' field is set to 'Laptop Request Project' and the 'State' dropdown is set to 'Complete' (highlighted with a red box). Other fields include 'Parent', 'Release date', 'Install date', 'Installed from', and 'Description'. The 'Related Links' section contains 'Export to XML' (also highlighted with a red box), 'Merge with Another Update Set', 'Scan Update Set', and '[SN Utils] Versions (0)'. Below this is a table titled 'Customer Updates (11)' with columns: Created, Type, View, Target name, Updated by, Remote update set, and Action. Two rows are listed: '2025-01-26 22:40:32 Catalog UI Policy Show Accessories Details admin (empty) INSERT_OR_UPDATE' and '2025-01-26 22:43:26 Catalog UI Policy Action accessories_details admin (empty) INSERT_OR_UPDATE'.

Login to another Instance:

Retrieving the update set:

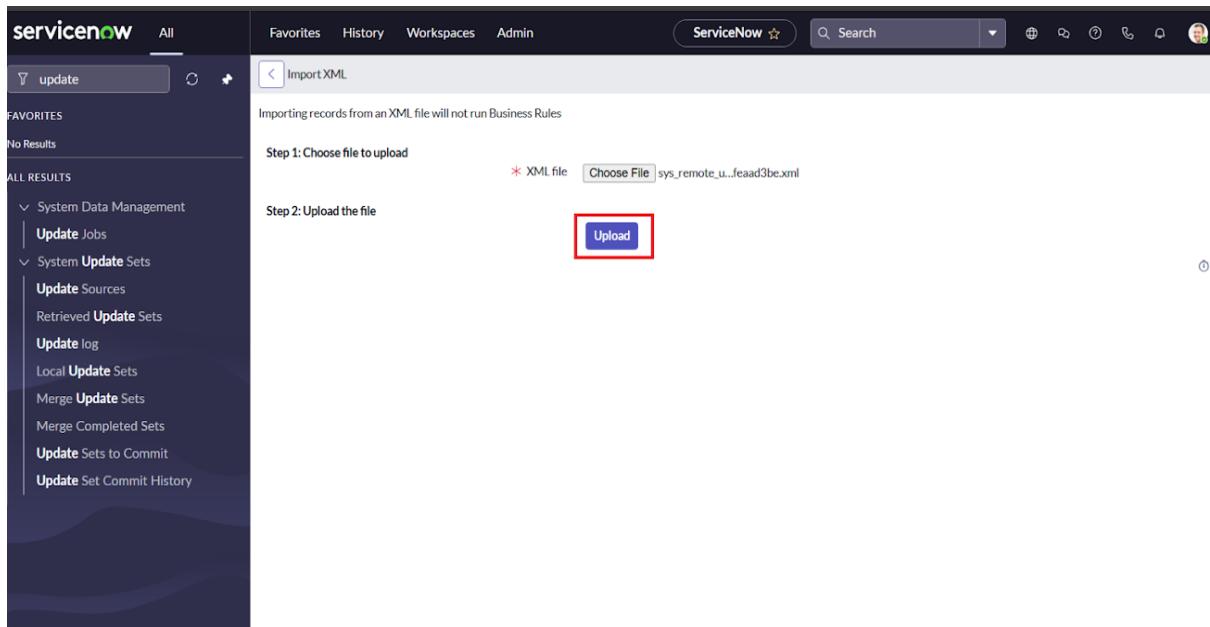
1. Open another instance in incognito window
2. Login with credentials
3. Click on all>> search for update sets
4. Select “Retrieved update set” under system update set
5. It open retrieved update set list and scroll down
6. Click on Import update set from XML

The screenshot shows the ServiceNow interface with the following details:

- Left Sidebar:** Shows a search bar with "update" and a navigation tree with "System Data Management" expanded, showing "Update Jobs", "System Update Sets" (which has "Retrieved Update Sets" selected and highlighted with a red box), "Update Sources", "Update log", "Local Update Sets", "Merge Update Sets", "Merge Completed Sets", "Update Sets to Commit", and "Update Set Commit History".
- Top Bar:** Shows "Retrieved Update Sets" in the title bar, a search bar, and various navigation icons.
- Table:** A list of retrieved update sets with the following columns: Name, Application, State, Update source, Description, Loaded, Committed, Parent, and Remote Batch Base. The table contains 15 rows, with the 10th row highlighted in purple.
- Bottom:** A "Related Links" section with a link "Import Update Set from XML" (also highlighted with a red box).

7.Upload the downloaded file in XML file

8.Click on Upload and it gets uploaded.



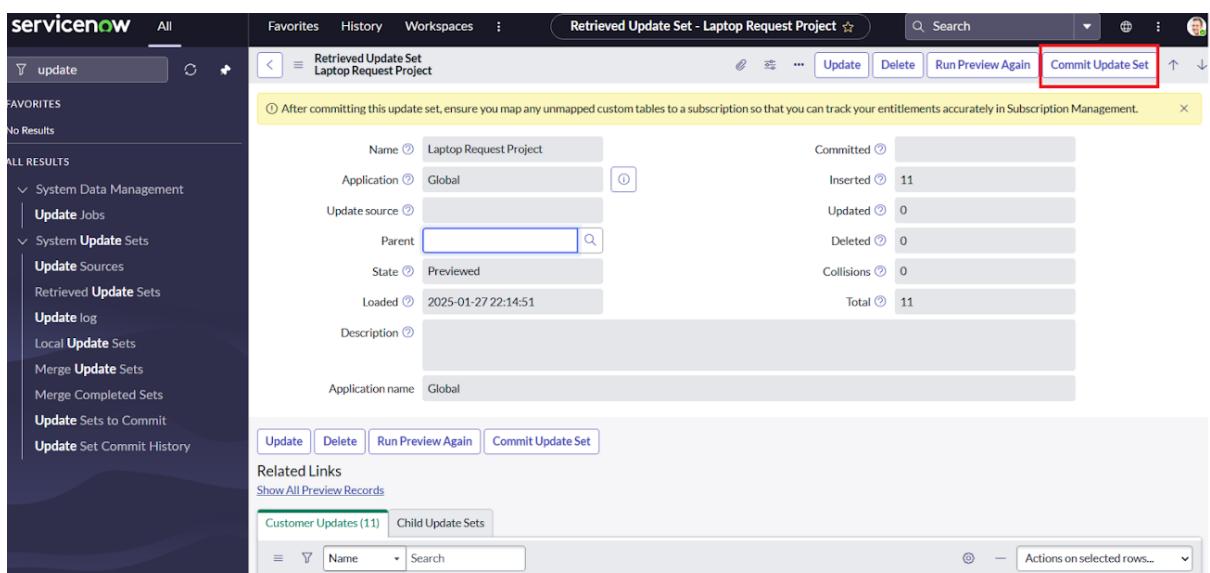
9. Open retrieved update set 'laptop request project'

10. Click on preview update set

11. And click on commit update set

12. And also see the related tab updates

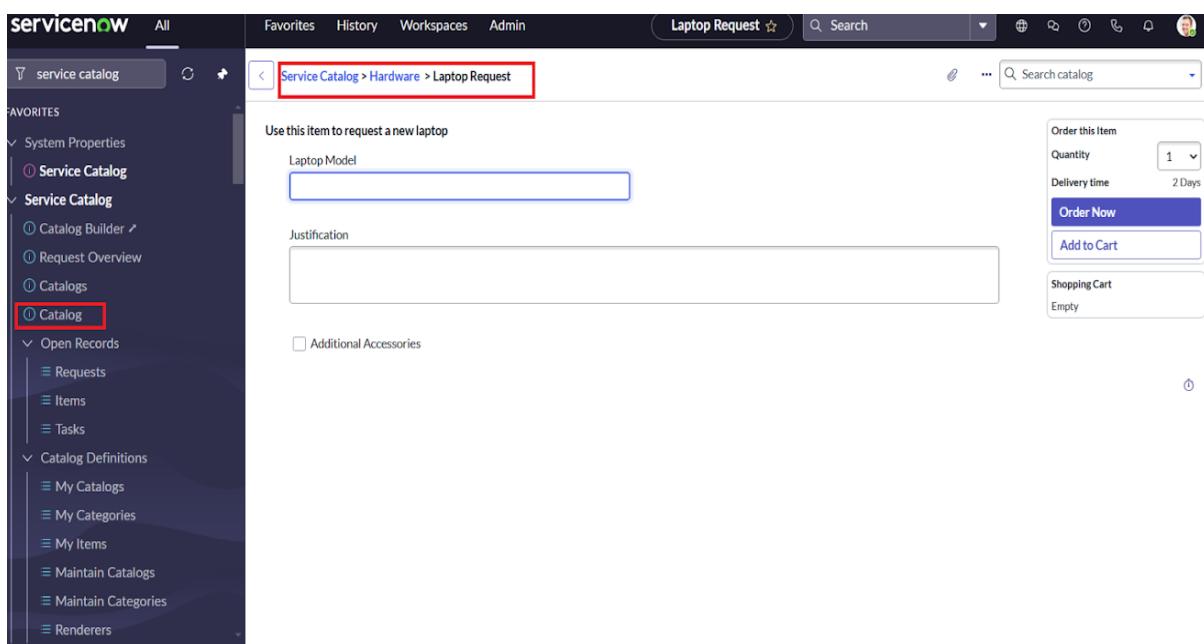
13. After committing update set in this instance we get all updates which are done in the previous instance



Testing:

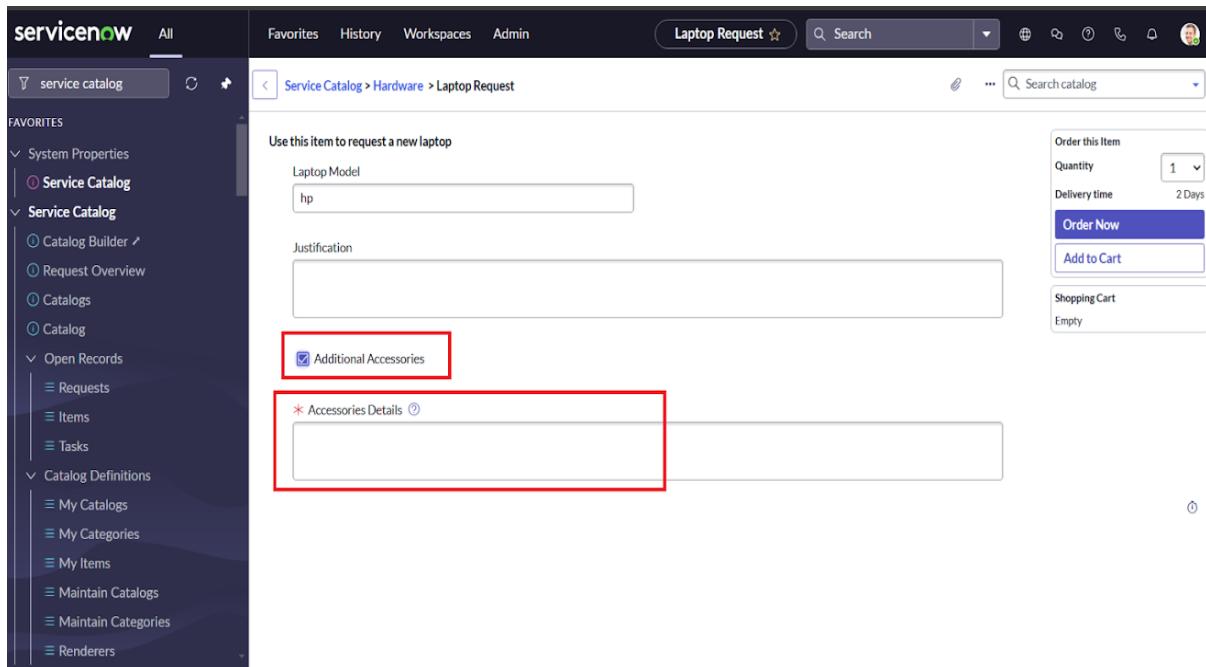
Test Catalog Item

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



6. As per our scenario, when we click on additional accessories checkbox then accessories details fields is visible and that should be mandatory

7. 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.