

Date	01 Nov 2025
Team ID	NM2025TMID01308
Project Name	Laptop Request Catalog Item using Service Now
Max mark	4

# Laptop Request Catalog Item using Service Now

## Introduction

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.

## Key Features

- **Update Set :** Create or select an update set to track changes.
- **Service Catalog Item:** Create the laptop request item in the Service Catalog.
- **UI Policy:** Define UI policies to control form behavior
- **UIAction:** Add buttons or links (UI actions) for user interactions.
- **Export Update Set:** Export the update set after completing configurations.
- **Login toAnother Instance:** Access a different ServiceNow instance
- **Testing:** Test the catalog item to ensure all functionality works as expected.
- **Conclusion:** Final thoughts or wrap-up.

## Pre-requisites

1. Active ServiceNow Personal Developer Instance (PDI) obtained from [developer.servicenow.com](https://developer.servicenow.com).
  2. Basic familiarity with:
    - **ServiceNow navigation and configuration**
    - **Tables, forms, and related lists**
    - **Business rules and Flow Designer**
- GitHub or other repository (optional) for maintaining documentation and exported update sets

## Requirements Functional

### Requirements

- The system must allow the creation of an update set to track changes made for the catalog item.
- Users should be able to create a new catalog item specifically for laptop requests.
- The item should include relevant fields such as model, purpose, justification, and approval.
- Show/hide fields based on conditions.
- Make fields mandatory or read-only.
- Add actions like submit, reset, or cancel to the catalog item form for user interaction.
- Ability to export the completed update set for transfer to another instance.

## Non-Functional Requirements

- The catalog item form should load within 2 seconds.
- Request submission should be processed without noticeable delay.
- The catalog item form should be user-friendly and intuitive.
- Field labels and help text must be clear and meaningful.
- Only authorized users (e.g., ITAdmins or CatalogAdmins) should be able to create or modify the catalog item.
- Data in the form should be validated to prevent injection attacks.

## Phases of the Project

### Ideation Phase

The **Ideation Phase** identifies the need to automate laptop requests using ServiceNow. Stakeholders discuss challenges with manual processes and propose a catalog item with dynamic forms and approvals. Key requirements are outlined, feasibility is assessed, and the idea is approved to move forward.

### Requirement Analysis Phase

- Identify required fields (e.g., laptop model, justification).
- Define user roles (requester, approver, fulfiller).
- Document functional and non-functional requirements.
- Set business rules and approval conditions.
- Plan request workflow (submit → approve → fulfill).
- Use ServiceNow components like Catalog Item, UI Policies, and Update Sets.
- Validate and finalize requirements with stakeholders.

### Project Planning Phase

The team executed these milestones:

1. ServiceNow Instance Setup

- Signed up at developer.servicenow.com and requested a Personal Developer Instance (PDI)
- Filled necessary details; received instance access credentials via email
- Logged in and prepared the instance for development.

## 2. Creation of Local Update Set

### 1. Access Navigation

Open ServiceNow and go to All → Update Sets.

### 2. Choose Local Update Sets

Select Local Update Sets under the *System Update Sets* module.

### 3. Create New Update Set

Click New to open the update set form.

Enter a meaningful name, e.g., "Laptop Request".

### 4. Save and Submit

Click Submit to save the new update set.

### 5. Activate the Update Set

- After submission, click Make Current.
- This ensures all your changes are tracked under this update set.

The screenshot shows the 'Update Set - Create Laptop Request Project 2' form in ServiceNow. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and a search bar. The main form area has the following fields:

- Name:** Laptop Request Project 2
- State:** In progress
- Parent:** (empty field with a search icon)
- Release date:** (empty field with a calendar icon)
- Description:** (empty text area)

On the right side of the form, there is an 'Application: Global' label. At the bottom of the form are two buttons: 'Submit' and 'Submit and Make Current'.

## 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 Catalog Items list view. The table has columns: Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated. The data includes items like Privacy Filter - X1 Carbon, Privacy Filter, Privacy Filter, Microsoft Access, Adobe Acrobat, and various iPhone models (iPhone 13, iPhone 13 pro, iPhone 4 Cable, iPhone 5, iPhone 5 Cable, iPhone 6s, iPhone 6s Plus) with their respective details.

Short description	Active	Roles	Catalogs	Category	Price	Type	Updated
Privacy Filter - X1 Carbon	true		Service Catalog	Peripherals	\$43.19	Item	2022-11-20 20:46:33
Privacy Filter	true		Service Catalog	Peripherals	\$42.23	Item	2022-11-20 20:46:33
Privacy Filter	true		Service Catalog	Peripherals	\$40.31	Item	2022-11-20 16:00:00
Microsoft Access	true		Service Catalog	Software	\$139.99	Item	2022-11-20 20:46:33
Adobe Acrobat	true		Service Catalog	Software	\$139.99	Item	2022-12-05 20:46:33
This standard change template describes ...	true		Service Catalog	Network Standard Changes	\$0.00	Item	2025-03-31 02:15:56
Add/Remove users from group	true		Service Catalog	Services	\$0.00	Item	2022-12-05 10:17:33
Create, edit or convert PDF files	true		Service Catalog	Software	\$0.00	Item	2022-12-05 20:46:33
More connected ways of creating and shar...	true		Service Catalog	Software	\$0.00	Item	2022-12-05 20:46:33
Apple iPad 3	false		Service Catalog	Tablets	\$600.00	Item	2022-11-20 20:46:33
Apple iPhone 13	Request for Apple iPhone 13	true	Service Catalog	Mobiles	\$799.00	Item	2022-05-20 08:30:16
Apple iPhone 13 pro	Request for Apple iPhone 13 pro	true	Service Catalog	Mobiles	\$999.00	Item	2023-05-24 03:02:19
Apple iPhone 4 Cable	For Apple iPhone 4/4S	false	Service Catalog	Peripherals	\$19.00	Item	2022-11-20 20:46:33
Apple iPhone 5	Apple iPhone 5	false	Service Catalog	Mobiles	\$599.99	Item	2022-11-20 20:46:33
Apple iPhone 5 Cable	Apple iPhone 5 Cable	false	Service Catalog	Peripherals	\$19.00	Item	2022-11-20 20:46:33
Apple iPhone 6s	Apple iPhone 6s	false	Service Catalog	Hardware	\$799.99	Item	2022-11-20 20:46:33
Apple iPhone 6s Plus	Apple iPhone 6s Plus	false	Service Catalog	Mobiles	\$799.99	Item	2022-11-20 20:46:33

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

Click on 'SAVE'

The screenshot shows the Catalog Item - Laptop Request creation form. The Name field is set to 'Laptop Request'. The Catalog dropdown is set to 'Service Catalog'. The Category is set to 'Hardware'. The Short description field contains the text 'Use this item to request a new laptop'. The Description field is a rich text editor.

## 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 'Variable - New Record' screen for a catalog item named 'Laptop Request'. The 'Type' is set to 'Single Line Text' and the 'Order' is 100. The 'Question' tab is selected, displaying fields for Question (Laptop Model), Name (laptop\_model), Conversational label, Tooltip, and Example Text. A 'Submit' button is at the bottom.

## 2. Variable 2:Justification

Type: Multi line text

Name: justification

Order:200

## 3. Variable 3:AdditionalAccessories

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 'Catalog Item - Laptop Request' screen. The 'Variables' section lists four variables: 'Laptop Model' (Single Line Text, Order 100), 'Justification' (Multi Line Text, Order 200), 'Additional Accessories' (Checkbox, Order 300), and 'Accessories Details' (Multi Line Text, Order 400). The 'Edit in Catalog Builder' button is visible at the top right of the variables table.

## 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]

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 Requested Item or Catalog Task form. [More Info](#)

Applies to: A Catalog Item  
Catalog Item: Laptop Request  
Short description: show accessories details

When to Apply:

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.

Catalog Conditions: Add Filter Choose option: "OR" Clause  
additional\_accessories IS true AND OR X

Applies on a Catalog Item view  Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form  
Applies on Catalog Tasks  On load   
Applies on Requested Items  Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false

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 - New Record

Catalog Item: Laptop Request  
Variable name: accessories\_details  
Order: 100

Application: Global  
Mandatory: True  
Visible: True  
Read only: Leave alone  
Value action: Leave alone  
Field message type: None

Submit

Catalog UI Policy - show accessories details

Conditions:

- 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

Actions:

- Applies on Catalog Item view:  Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form (On load: )
- Applies on Catalog Tasks:
- Applies on Requested Items:

Related Links: Run Point Scan

Catalog UI Policy Actions

Name	Read only	Mandatory	Visible	Order
accessories.details	Leave alone	True	True	100

## 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

Update Set - Laptop Request Project

Customer Updates (10)

Created	Type	View	Target name	Updated by	Remote update set	Action
2025-06-24 06:51:45	Variable	Laptop Model	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Variable	Justification	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Variable	Additional Accessories	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Variable	Accessories	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Catalog Item	Laptop Request	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Catalog Item	Service Catalog Laptop Request	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	Catalog Item Category	Hardware Laptop Request	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	UI Action	Reset Form	laptop	admin	Laptop Request	INSERT_OR_UPDATE
2025-06-24 06:51:45	UI Action	Shopping Cart [sc.cart]	laptop	admin	Laptop Request	INSERT_OR_UPDATE

## 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

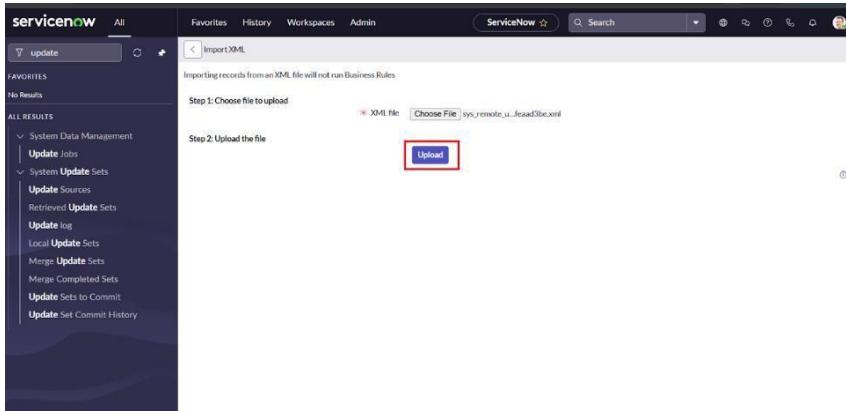
Retrieved Update Set - Laptop Request Project

Customer Updates (10)

Name	Type	Target name	Table	View	Action
catalog_ui_policy_04faab06c552210a9fb1fd4013102	Catalog UI Policy	show accessories details			INSERT_OR_UPDATE
catalog_ui_policy_action_f67dfe4c552210a9fb1fd4013146	Catalog UI Policy Action	accessories.details			INSERT_OR_UPDATE
item_option_new_ae199782c352210a9fb1fd40131fb	Variable	Accessories			INSERT_OR_UPDATE
item_option_new_ae199782c352210a9fb1fd40131ac	Variable	Additional Accessories			INSERT_OR_UPDATE
item_option_new_ae199782c352210a9fb1fd40131a	Variable	Laptop Model			INSERT_OR_UPDATE
item_option_new_ae199782c352210a9fb1fd401313	Variable	Justification			INSERT_OR_UPDATE
sc_cat_item_1166900ec012210a9fb1fd4013199	Catalog Item	Laptop Request			INSERT_OR_UPDATE
sc_cat_item_catalog_b317df002c352210a9fb1fd40131fe	Catalog Item Catalog	Service Catalog Laptop Request			INSERT_OR_UPDATE
sc_cat_item_category_sc_cat_item_category_b317df002c352210a9fb1fd4013103	Catalog Item Category	Hardware Laptop Request			INSERT_OR_UPDATE
sys_ui_action_a49f6fc352210a9fb1fd40131f1	UI Action	Reset Form	sc.cart		INSERT_OR_UPDATE

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.

Name	Value
Name	Laptop Request Project
Application	Global
Update source	
Parent	
State	Previewed
Loaded	2025-06-24 07:39:12
Description	
Application name	Global

Customer Updates (10)	Child Update Sets
Customer Updates (10)	Child Update Sets
<input type="text" value="Name"/> <input type="button" value="Search"/> <span style="float: right;">Actions on selected rows...</span>	
Remote update set = Laptop Request Project	

Name	Type	Target name	Table	View	Action
catalog_ui_policy_046ad06c352210a969b1f6d4013102	Catalog UI Policy	show accessories details			INSERT_OR_UPDATE
catalog_ui_policy_action_f07bdff46c352210a969b1f6d4013146	Catalog UI Policy Action	accessories.details			INSERT_OR_UPDATE
item_option_new_1f399702c352210a969b1f6d40131515	Variable	Accessories Details			INSERT_OR_UPDATE
item_option_new_4209fbcc3122210a969b1f6d40131ae	Variable	Additional Accessories			INSERT_OR_UPDATE
item_option_new_a8e70742c3522210a969b1f6d40131df	Variable	Laptop Model			INSERT_OR_UPDATE
item_option_new_ae8582c3522210a969b1f6d4013123	Variable	Justification			INSERT_OR_UPDATE
sc_cat_item_11d6930ec03122210a969b1f6d4013199	Catalog Item	Laptop Request			INSERT_OR_UPDATE
sc_cat_item_catalog_b187f02c3522210a969b1f6d40131fe	Catalog Item Catalog	Service Catalog.Laptop Request			INSERT_OR_UPDATE
sc_cat_item_category_75871342c3522210a969b1f6d401303	Catalog Item Category	Hardware.Laptop Request			INSERT_OR_UPDATE
sys_ui_action_a61d9fc3522210a969b1f6d40131f1	UI Action	Reset Form	Shopping Cart[sc_cart]		INSERT_OR_UPDATE

## 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.

Use this item to request a new laptop

Laptop Model

Justification

Additional Accessories

Order this Item

Quantity: 1

Delivery time: 2 Days

**Order Now**

**Add to Cart**

Shopping Cart  
Empty

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.

Use this item to request a new laptop

Laptop Model

Justification

Additional Accessories

Accessories Details

## 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.