

Team ID	NM2025TMID02656
Project Name	Laptop Request Catalog Item using Service Now

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
- **UI Action:** Add buttons or links (UI actions) for user interactions.
- **Export Update Set:** Export the update set after completing configurations.
- **Login to Another 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.
2. Basic familiarity with:
 - **ServiceNow navigation and configuration**
 - **Tables, forms, and related lists**
 - **Business rules and Flow Designer**
3. 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., IT Admins or Catalog Admins) 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 ServiceNow interface for creating a new update set. The title bar reads "Update Set - Create Laptop Request Project 2". The main form has the following fields:

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

At the bottom of the form, there 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 interface with the 'Catalog Items' page selected. A context menu is open over the first item in the list, which is 'Privacy Filter - X1 Carbon'. The menu includes options such as 'My Catalogs', 'My Categories', 'Maintain Catalogs', 'Maintain Categories', 'Renderers', 'Maintain Dynamic Categories', 'Maintain Items', 'My Content Items', 'Content Items', and 'Ordered Item Links'. The main list displays various catalog items including 'Privacy Filter', 'Microsoft Access', 'Adobe Acrobat', 'This standard change template describes ...', 'Add/Remove users from group', 'Create, edit or convert PDF files', 'More connected ways of creating and shar...', 'Apple iPad 3', 'Request for Apple iPhone 13', 'Apple iPhone 13 pro', 'Apple iPhone 4 Cable', 'Apple iPhone 5', 'Apple iPhone 5 Cable', 'Apple iPhone 6s', and 'Apple iPhone 6s Plus'. The table has columns for short description, Active, Roles, Catalogs, Category, Price, Type, and Updated.

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 highlighted with a red box. Other fields include 'Catalog' set to 'Service Catalog', 'Category' set to 'Hardware', 'State' and 'Checked out' both set to 'None', 'Owner' set to 'System Administrator', 'Application' set to 'Global', and 'Active' checked. The 'Short description' field contains the text 'Use this item to request a new laptop'. Below it is a rich text editor for the 'Description' field.

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' page in ServiceNow. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The search bar contains 'Variable - New Record'. The main form has the following fields:

Application	Global	Active	<input checked="" type="checkbox"/>
Type	Single Line Text	Mandatory	<input type="checkbox"/>
Catalog item	Laptop Request	Readonly	<input type="checkbox"/>
Order	100	Hidden	<input type="checkbox"/>

Below the form, there are tabs: Question, Annotation, Type Specifications, Default Value, Auto-populate, Permission, and Availability. The 'Question' tab is selected. It contains 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: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 'Catalog Item - Laptop Request' page. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The search bar contains 'Catalog Item - Laptop Request'. The main form has a 'Mets' field and a 'Variables' section. The 'Variables' section table lists the following variables:

Type	Question	Order
Single Line Text	Laptop Model	100
Multi Line Text	Justification	200
Checkbox	Additional Accessories	300
Multi Line Text	Accessories Details	400

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]

The screenshot shows the 'Catalog UI Policy - New Record' form in ServiceNow. The 'When to Apply' tab is active. Under 'Catalog Conditions', there is a clause: 'Catalog Item: Laptop Request' and 'Field: additional_accessories' with the condition 'is true'. Other tabs like 'Script', 'Apply on Catalog Item view', and 'On load' are visible.

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.

The screenshot shows the 'Catalog UI Policy Action - New Record' form in ServiceNow. It displays settings for a variable named 'accessories_details': Order: 100, Mandatory: True, and Visible: True. Other fields like Read only, Value action, and Field message type are also present.

Catalog UI Policy - show accessories details

Catalog Conditions: additional_accessories is true

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

Applies on Catalog Tasks:

Applies on Requested Items:

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

* Name: Laptop Request Project

State: Complete

Parent:

Release date:

Install date:

Installed from:

Description:

Application: Global

Created: 2025-06-24 06:51:45

Created by: admin

Merged to:

Customer Updates (10)

Created	Type	View	Target name	Updated by	Remote update set	Action
2025-06-24 06:51:45	Variable	<input type="text"/>	<input type="text"/>	admin	Laptop Request Project	<input type="button" value="Import"/>

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

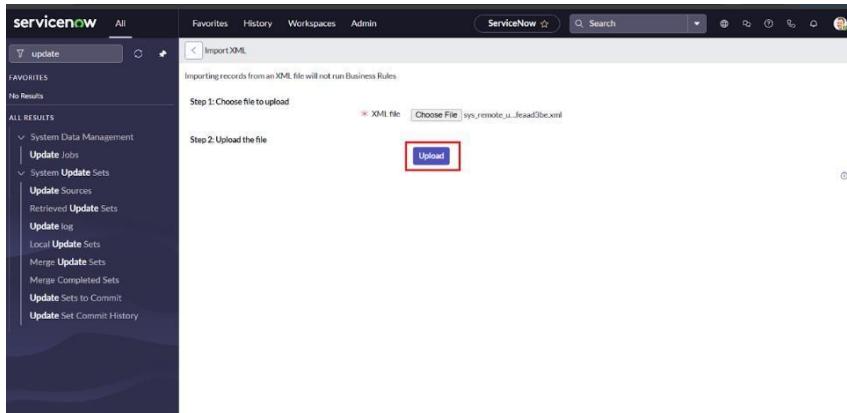
Retrieved Update Set - Laptop Request Project

Customer Updates (10)

Name	Type	Target name	Table	View	Action
catalog_ui_policy_04faab06c522210a99fb1fd4013102	Catalog UI Policy	show accessories details			INSERT_OR_UPDATE
catalog_ui_policy_action_f67dfe46c5522210a99fb1fd4013146	Catalog UI Policy Action	accessories.details			INSERT_OR_UPDATE
item_option_new_1c3997823522210a99fb1fd40131fb	Variable	Accessories.Details			INSERT_OR_UPDATE
item_option_new_4009f6cc0122210a99fb1fd40131ae	Variable	Additional Accessories			INSERT_OR_UPDATE
item_option_new_a676f7d42c3522210a99fb1fd40131ha	Variable	Laptop Model			INSERT_OR_UPDATE
item_option_new_ae16382d3522210a99fb1fd40131223	Variable	Justification			INSERT_OR_UPDATE
sc_cat_item_11669300e3122210a99fb1fd4013199	Catalog Item	Laptop Request			INSERT_OR_UPDATE
sc_cat_item_catalog_b107df02c3522210a99fb1fd640131fe	Catalog Item Catalog	Service Catalog/Laptop Request			INSERT_OR_UPDATE
sc_cat_item_category_7987342c3522210a99fb1fd4013103	Catalog Item Category	Hardware/Laptop Request			INSERT_OR_UPDATE
sys_ui_action_a4ff6fc63522210a99fb1fd40131f1	UI Action	Reset Form	Shopping Cart [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.

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.