

Laptop Request Catalog Item

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Team Members:

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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.

Objective

Design and implement a ServiceNow catalog item that enables employees to submit laptop requests dynamically with form validations, clear guidance, and governance controls, improving speed, accuracy, and accountability in the process.

Skills

UIPath RPA, Tanzu Application Service

TASK INITIATION

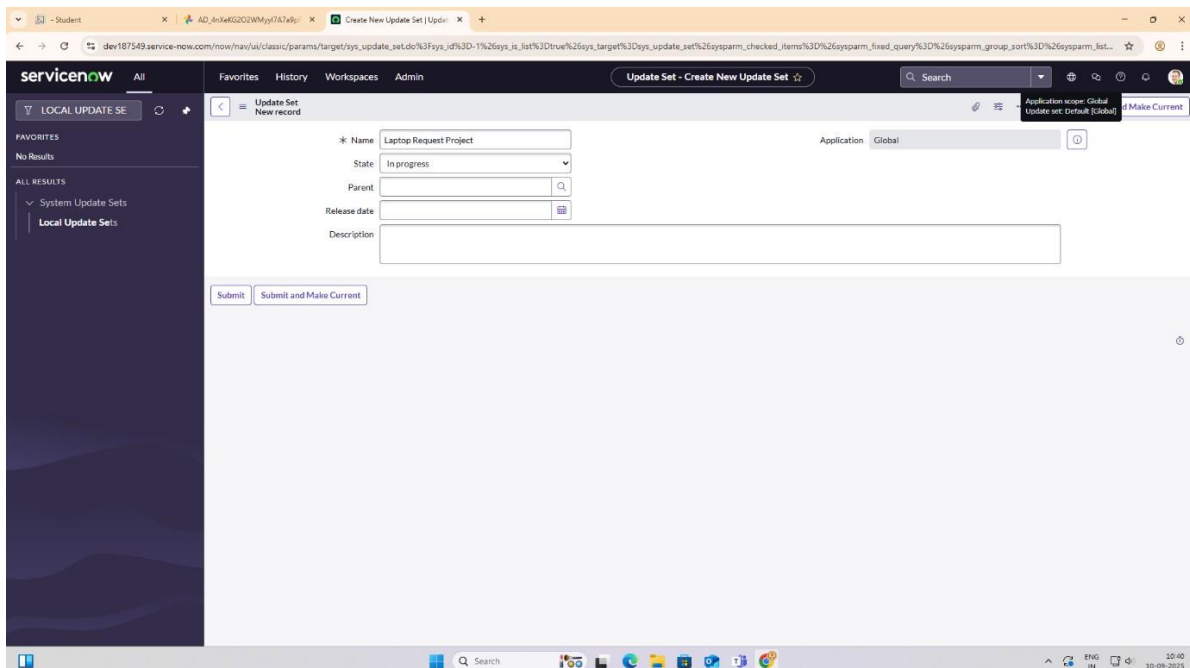
Milestone 1: Create Local Update Set

Activity 1: Create Update Set in ServiceNow

1. Open ServiceNow instance.
2. Click on All → search for Update Sets.
3. Select Local Update Sets under System Update Sets.
4. Click on New.
5. Fill in the following details:

Name: Laptop Request

6. Click Submit and make it Current.
7. By clicking on the button it activates the update set



The screenshot shows the ServiceNow interface for creating a new update set. The browser address bar shows the URL: `dev187549.service-now.com/now/nav/ui/classic/params/target/sys_update_set.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys_update_set%26sysparm_checked_items%3D%26sysparm_fixed_query%3D%26sysparm_group_sort%3D%26sysparm_list...`. The page title is "Update Set - Create New Update Set". The left sidebar shows the navigation menu with "LOCAL UPDATE SET" selected. The main form has the following fields:

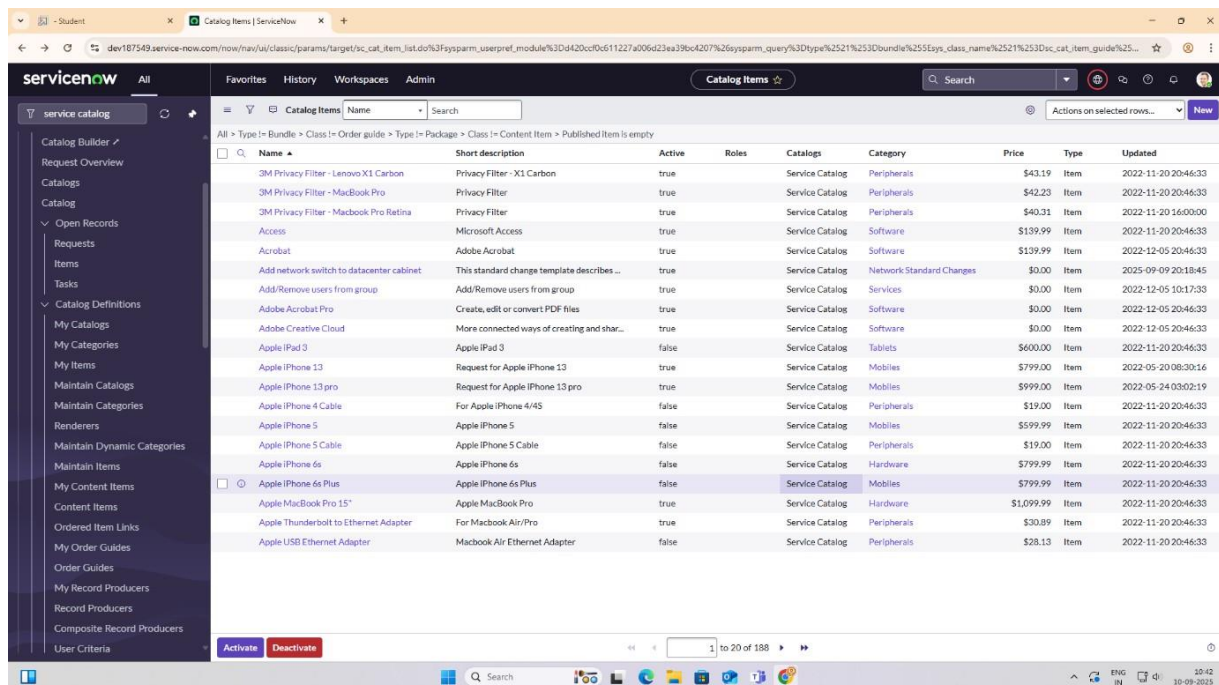
- Name: Laptop Request Project
- State: In progress
- Parent: (empty)
- Release date: (empty)
- Description: (empty)

At the bottom of the form, there are two buttons: "Submit" and "Submit and Make Current". The "Submit and Make Current" button is highlighted. The right sidebar shows the "Application scope: Global" and "Update set: Default (Global)" with a "Make Current" button.

Milestone 2: Create Service Catalog Item

Activity 1: Create New Service Catalog Item in ServiceNow

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



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
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 network switch to datacenter cabinet	This standard change template describes ...	true		Service Catalog	Network Standard Changes	\$0.00	Item	2025-09-09 20:18:45
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 files	true		Service Catalog	Software	\$0.00	Item	2022-12-05 20:46:33
Adobe Creative Cloud	More connected ways of creating and shar...	true		Service Catalog	Software	\$0.00	Item	2022-12-05 20:46:33
Apple iPad 3	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	2022-05-24 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
Apple MacBook Pro 15"	Apple MacBook Pro	true		Service Catalog	Hardware	\$1,099.99	Item	2022-11-20 20:46:33
Apple Thunderbolt to Ethernet Adapter	For MacBook Air/Pro	true		Service Catalog	Peripherals	\$30.89	Item	2022-11-20 20:46:33
Apple USB Ethernet Adapter	Macbook Air Ethernet Adapter	false		Service Catalog	Peripherals	\$28.13	Item	2022-11-20 20:46:33

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

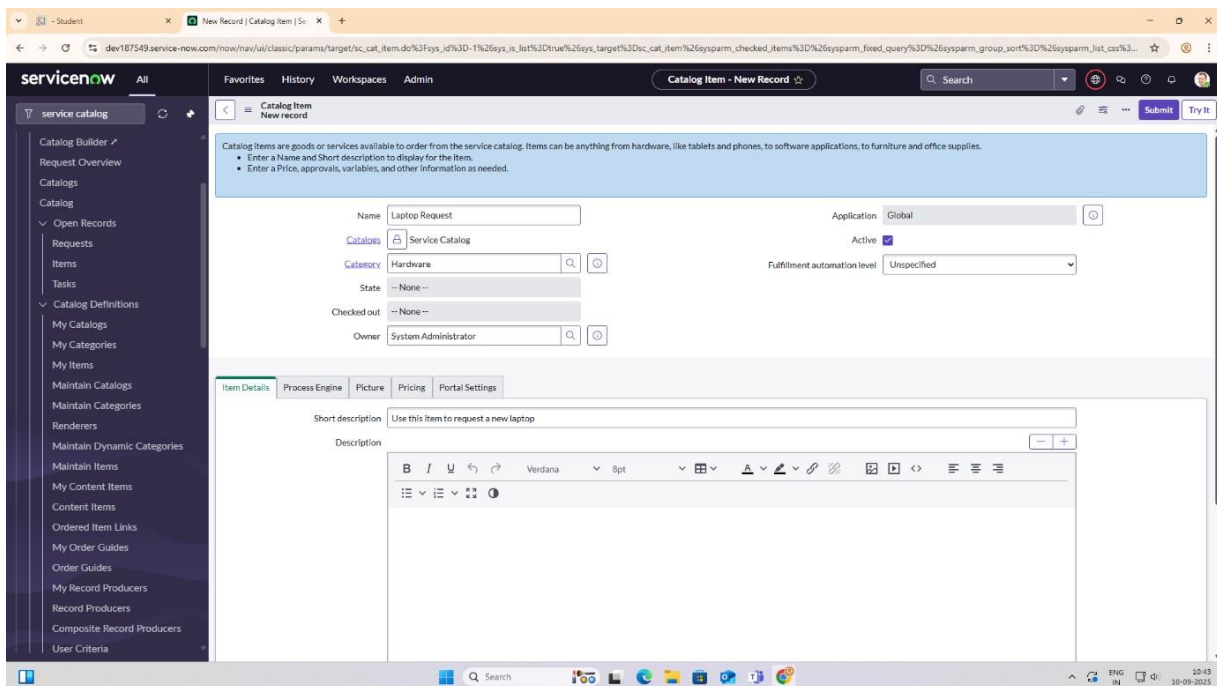
Name: Laptop Request

Catalog: service Catalog

Category: Hardware

Short Description: Use this item to request a new laptop

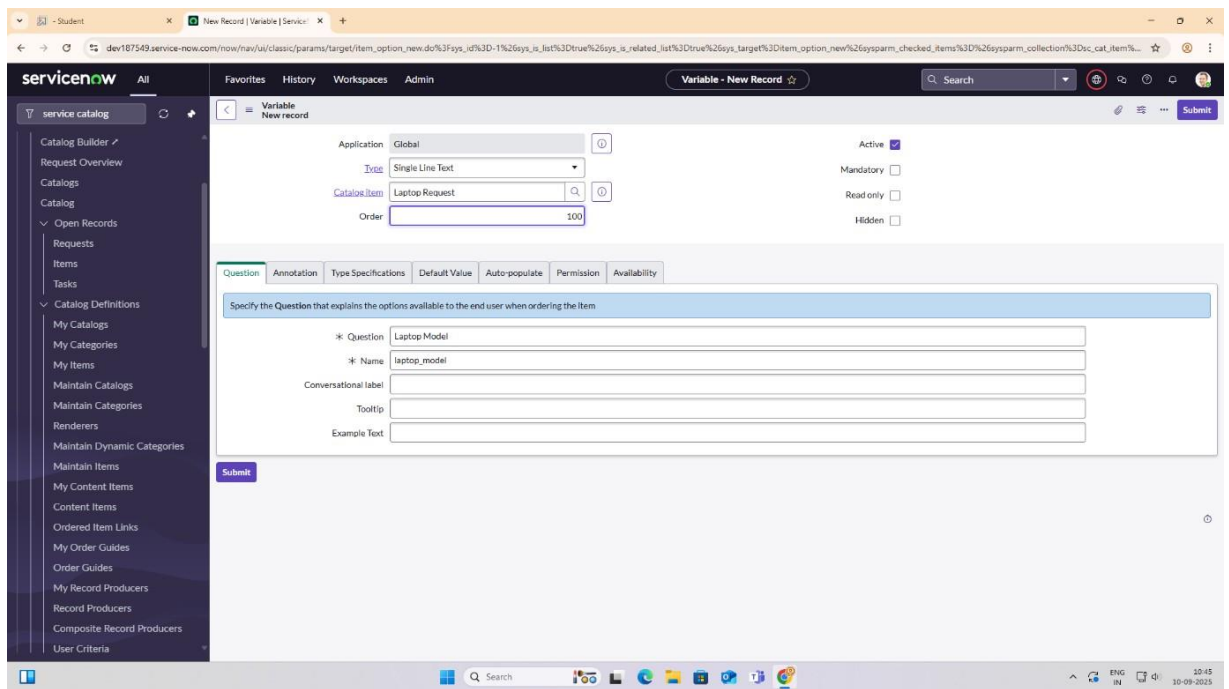
6.Click on 'SAVE'



Activity 2: Add Variables to the Catalog Item

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



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

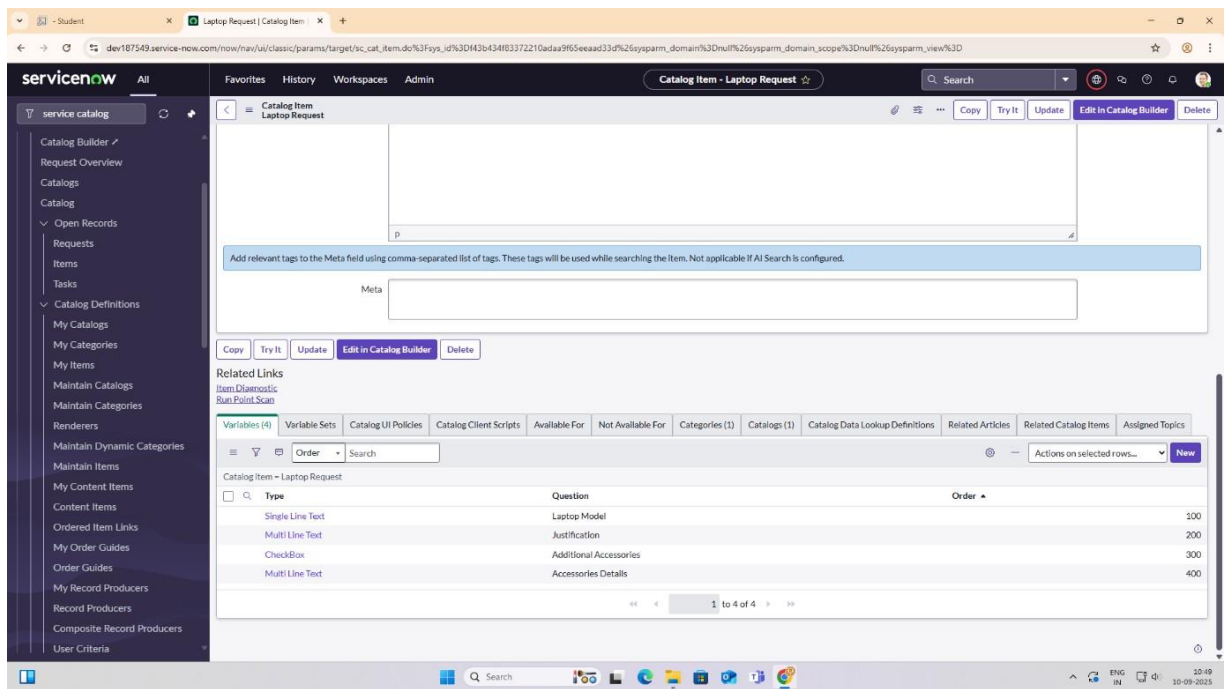
Type: Multi line text

Name:accessories_details

Order:400

Step2:

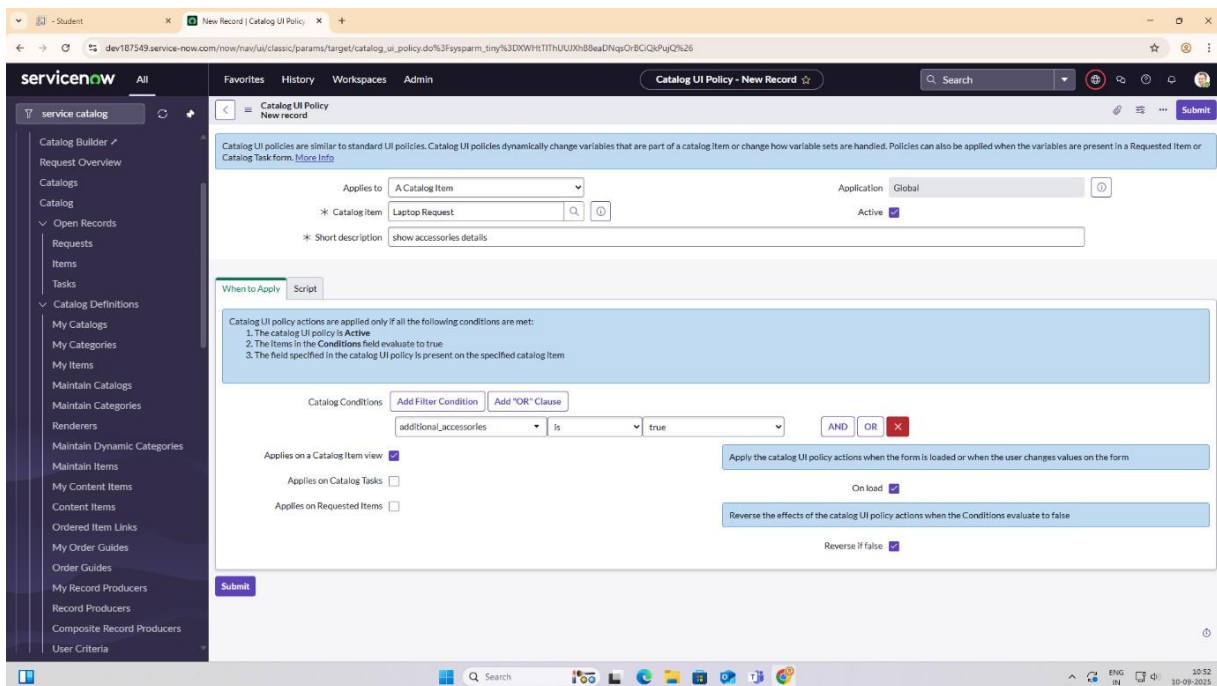
- After adding above variable which are added to newly created catalog item
- Then save the catalog item form



Milestone 3: Create Catalog UI Policies

Activity 1: Configure Catalog UI Policy for Dynamic Behavior

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

dev187549.service-now.com/now/nav/ui/classic/params/target/catalog_ui_policy_action.do%3Fsys_id%3D%26sys_is_list%3Dtrue%26sys_is_related_list%3Dtrue%26sys_target%3Dcatalog_ui_policy_action%26sysparm_checked_items%3D%26sysparm_collection%3D...

servicenow All Favorites History Workspaces Admin Catalog UI Policy Action - New Record

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](#)

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

dev187549.service-now.com/now/nav/ui/classic/params/target/sys_ui_action.do%3Fsys_id%3D%54ec70763b72210adaa9f65eead368%26sysparm_view%3D%26sysparm_domain%3Dnull%26sysparm_domain_scope%3Dnull

servicenow All Favorites History Workspaces Admin UI Action - Reset Form

Name: Reset Form

Table: Shopping Cart [sc_cart]

Order: 100

Action name: Reset Form

Active: ☒

Show insert: ☒

Show update: ☒

Client: ☒

List v2 Compatible: ☒

List v3 Compatible: ☐

Overrides:

Messages:

Comments:

Hint:

OnClick:

Condition:

Script:

```
1 function resetForm() {
2   g_form.clearForm(); // Clears all fields in the form
3   alert("The form has been reset.");
4 }
```

Application: Global

Form button: ☐

Form context menu: ☐

Form link: ☐

Form style: -- None --

List banner button: ☐

List bottom button: ☐

List context menu: ☐

List choice: ☐

List link: ☐

List style: -- None --

Update Delete

Milestone 4: Create UI Action

Activity 1: Create Reset Form UI Action

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

Table: shopping cart(sc_cart)

Order:100

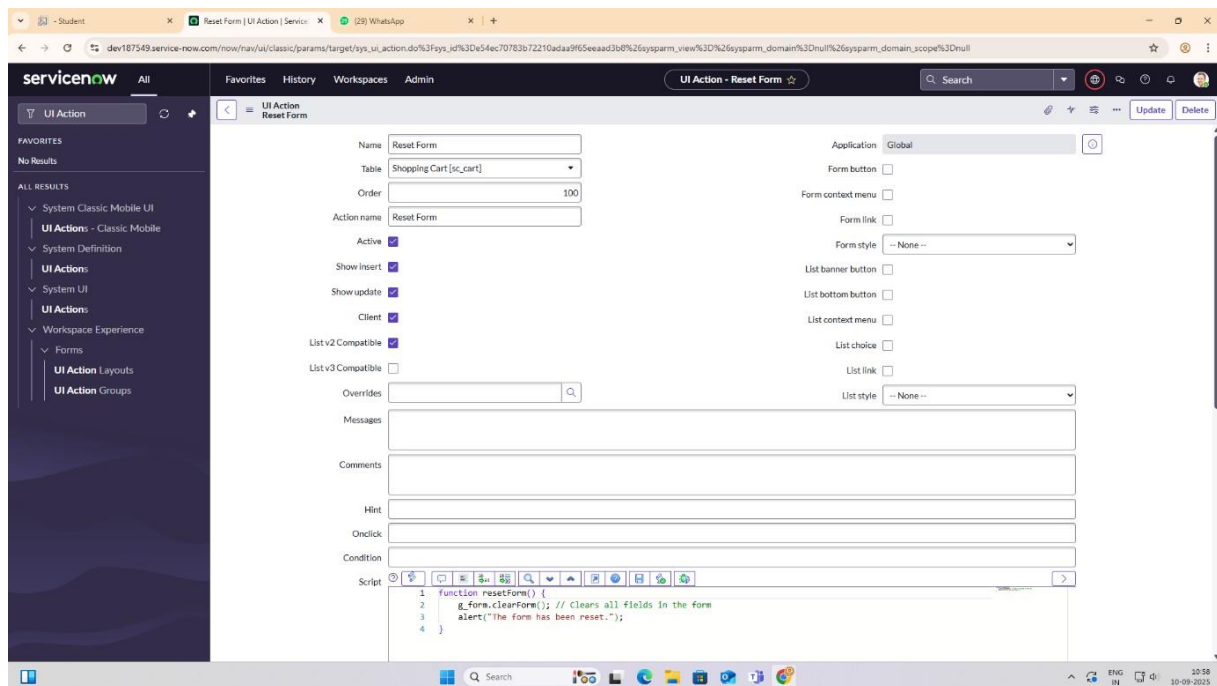
Action name: Reset form

Client : checked

Script:

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

Click on save



Milestone 5: Exporting Changes to Another Instance

Activity 1: Export Update Set as XML

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

ServiceNow Catalog UI Policy Configuration for 'show accessories details'.

Applies to: A Catalog Item
Application: Global
Active: ☒

When to Apply: Script

Conditions: additional_accessories is true

Applies on: ☒ Catalog Item view
☐ Catalog Tasks
☐ Applies on Requested Items

Actions: On load, Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false.

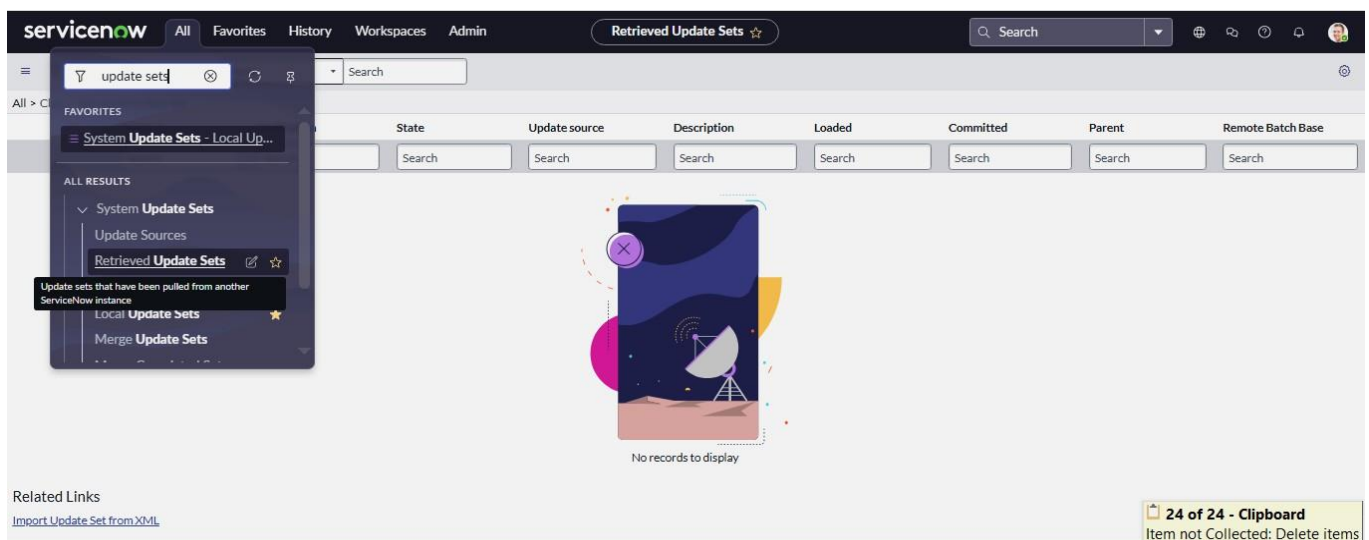
Related Links: Run Policy Script

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

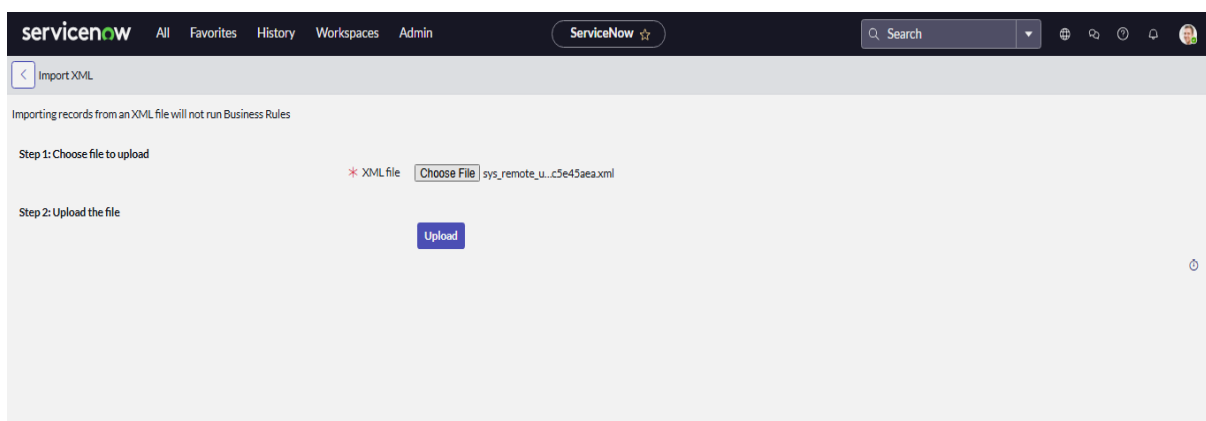
Milestone 6: Retrieving the Update Set

Activity 1: Import Update Set from XML into Another Instance

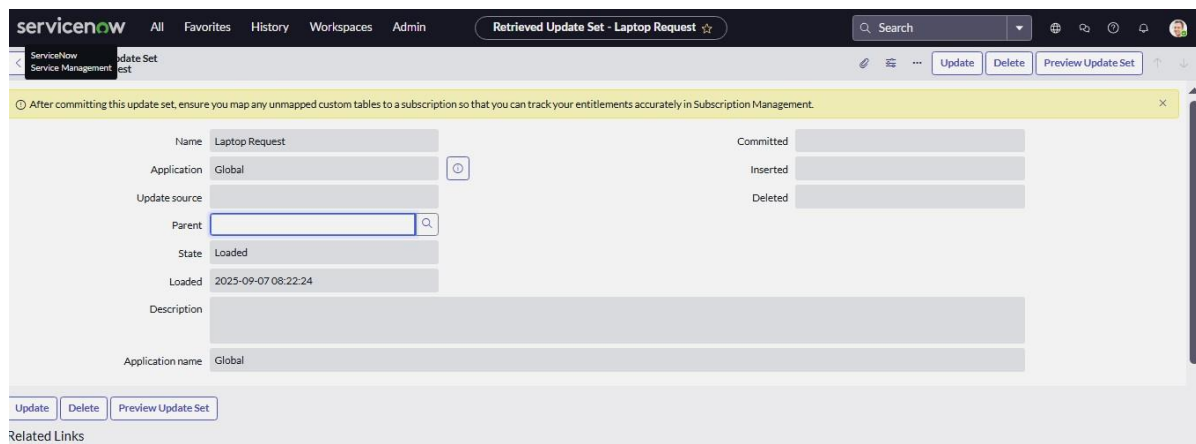
1. Open another instance in incognito window
2. Login with credentials
3. Click on all>> search for update sets
4. Select “Retrieved update set” under system update set
5. It open retrieved update set list and scroll down
6. Click on Import update set from XML



7. Upload the downloaded file in XML file
8. Click on Upload and it gets uploaded.



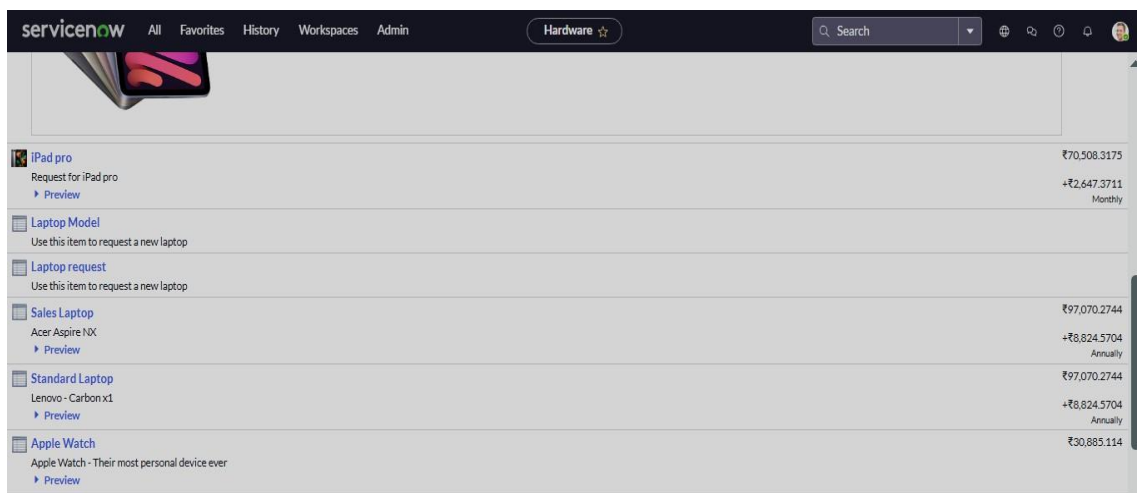
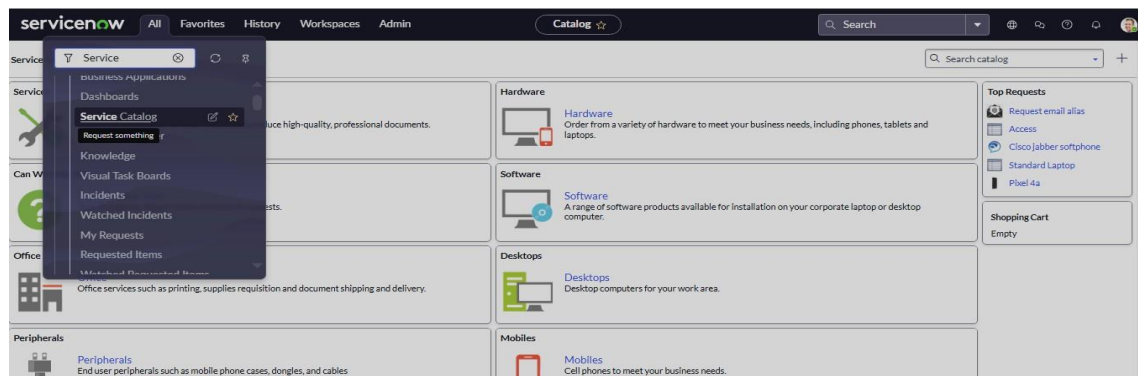
9. Open retrieved update set 'laptop request project'
10. Click on preview update set
11. And click on commit update set
12. And also see the related tab updates
13. After committing update set in this instance we get all updates which are done in the previous instance



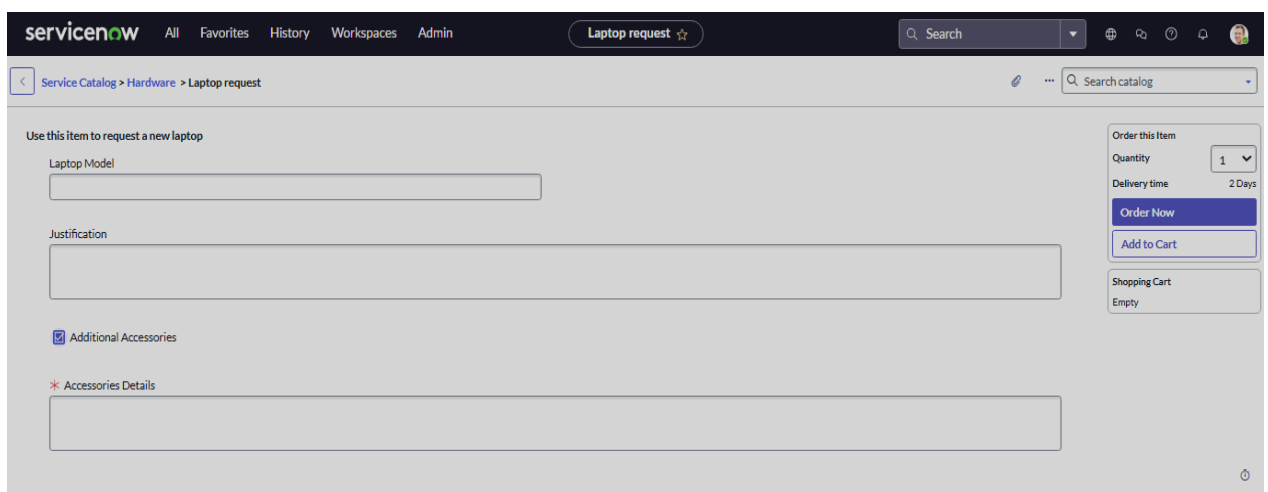
Milestone 7: Test Catalog Item

Activity 1: Verify Functionality of the Laptop Request 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.