

LAPTOP REQUEST CATALOG ITEM USING SERVICE NOW

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Team ID	LTVIP2026TMIDS41339
Project Name	Laptop Request Catalog Item using Service Now
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Introduction:

Employees of the company need a quick and efficient way to request laptops for work. The process is currently manual and prone to delays, and there is no dynamic form behavior to guide users or ensure accurate data gathering. A Service Catalog item that makes it easy for customers to request a laptop must be created in order to address this. It should include clear instructions, dynamic fields, and additional features like the option to reset the form if needed. The solution must also ensure that all changes are tracked for governance and deployment purposes.

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**
 - 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:

During the ideation phase, it is determined that ServiceNow should be used to automate laptop requests. Stakeholders talk about the difficulties with manual procedures and suggest a catalog item that requires permissions and dynamic forms. After outlining the essential needs and evaluating its viability, the concept is given the go-ahead to proceed.

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 "servicenow All Favorites History Workspaces : Update Set - Create Laptop Request Project 2". The main area contains fields for Name (Laptop Request Project 2), State (In progress), Parent (empty), Release date (empty), and Description (empty). Below the form are two buttons: "Submit" and "Submit and Make Current". The top right of the screen shows standard ServiceNow navigation icons.

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 page. A context menu is open over the 'service catalog' item in the list. The menu options include: My Catalogs, My Categories, My Items, Maintain Catalogs, Maintain Categories, Renderers, Maintain Dynamic Categories, Maintain Items, My Content Items, Content Items, Ordered Item Links, Apple iPhone 13, Request for Apple iPhone 13, Apple iPhone 13 pro, Request for Apple iPhone 13 pro, Apple iPhone 4 Cable, For Apple iPhone 4/4S, Apple iPhone 5, Apple iPhone 5, Apple iPhone 5 Cable, Apple iPhone 6s, Apple iPhone 6s Plus, and Apple iPad 3.

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	true		Service Catalog	Mobiles	\$799.00	Item	2022-05-20 08:30:16
Apple iPhone 13 pro	true		Service Catalog	Mobiles	\$999.00	Item	2022-05-24 03:02:19
Apple iPhone 4 Cable	false		Service Catalog	Peripherals	\$19.00	Item	2022-11-20 20:46:33
Apple iPhone 5	false		Service Catalog	Mobiles	\$599.99	Item	2022-11-20 20:46:33
Apple iPhone 5 Cable	false		Service Catalog	Peripherals	\$19.00	Item	2022-11-20 20:46:33
Apple iPhone 6s	false		Service Catalog	Hardware	\$799.99	Item	2022-11-20 20:46:33
Apple iPhone 6s Plus	false		Service Catalog	Mobiles	\$799.99	Item	2022-11-20 20:46:33

Buttons at the bottom: Activate, Deactivate, and a search bar.

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 fields filled are:

- Name: Laptop Request
- Catalog: Service Catalog
- Category: Hardware
- Active: checked
- Fulfillment automation level: Unspecified
- Short description: Use this item to request a new laptop

Below the form, there 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

Catalog Item - Laptop Request

Mets

Related Links: Item Overview, Run Prior Scan

Assigned Topics

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

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

Variable - New Record

Variable New record

Application: Global

Type: Single Line Text

Catalog Item: Laptop Request

Order: 100

Active:

Mandatory:

Read only:

Hidden:

Question: Specify the Question that explains the options available to the end user when ordering the item

* Question: Laptop Model

* Name: laptop_model

Conversational label:

Tooltip:

Example Text:

Submit

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 UI Policy Action - New Record' page in ServiceNow. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', a search bar, and various icons. The main title is 'Catalog UI Policy Action - New Record'. Below the title, it says 'New record'. The page displays configuration for a variable named 'accessories_details'. The configuration fields are as follows:

Catalog Item	Laptop Request	Application	Global
Variable name	accessories_details	Mandatory	True
Order	100	Visible	True
		Read only	Leave alone
		Value action	Leave alone
		Field message type	None

A 'Submit' button is located at the bottom left of the form.

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' page in ServiceNow. At the top, there are navigation links for All, Favorites, History, Workspaces, and a search bar. Below the header, there's a note about Catalog UI policies being similar to standard UI policies. The main form fields include 'Applies to' (set to 'A Catalog Item' with 'Catalog Item' set to 'Laptop Request'), 'Application' (set to 'Global'), and 'Active' (checkbox checked). The 'Short description' field contains 'show accessories details'. The 'When to Apply' tab is selected, showing a table with one condition: 'Catalog Conditions' with 'Choose option' set to 'FOR Clause', 'Field' to 'additional_accessories', 'Operator' to 'is', and 'Value' to 'true'. Other tabs like 'Script', 'Apply on Catalog Item view', 'On Load', and 'Reverse effects' are also 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:10

0 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 configuration for the 'accessories_details' view. It includes sections for Catalog Conditions (with options like 'additional_accessories' being true), UI policy actions (like 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form'), and Catalog UI Policy Actions (listing 'accessories_details' with various properties like Name, Read only, Mandatory, Visible, and Order).

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 'Update Set - Laptop Request Project' page. It displays basic information like Name (Laptop Request Project), State (Complete), and Application (Global). Below this is a table for 'Customer Updates' showing rows for various update items.

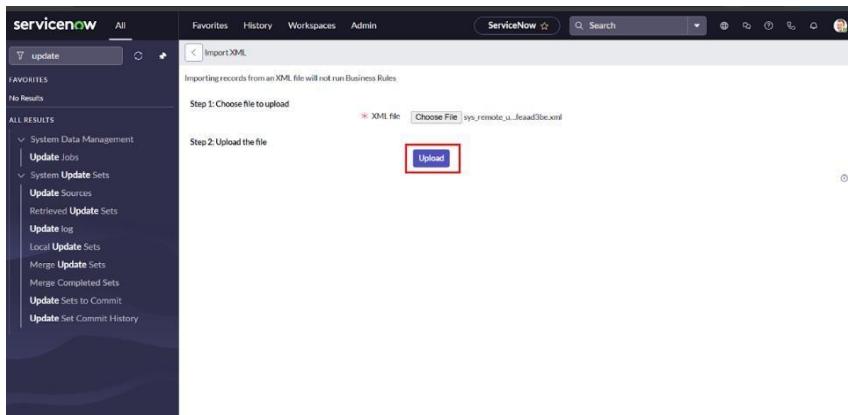
Retrieving the update set

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 'Retrieved Update Set - Laptop Request Project' page. It lists 'Customer Updates' imported from XML, showing various update items and their details.

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

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

- 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.

The screenshot shows the ServiceNow service catalog interface. At the top, there's a navigation bar with 'servicenow' and links for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The title bar says 'Laptop Request'. Below the title, the URL is 'Service Catalog > Hardware > Laptop Request'. The main area has a heading 'Use this item to request a new laptop'. It contains fields for 'Laptop Model' (with 'hp' typed in) and 'Justification'. To the right, there's a sidebar with 'Order this Item' settings: 'Quantity' set to 1, 'Delivery time' set to 2 days, and a large blue button labeled 'Order Now'. Below the sidebar is a 'Shopping Cart' section showing 'Empty'. At the bottom left, there's a checkbox for 'Additional Accessories' which is currently unchecked.

- 1.As per our scenario, when we click on additional accessories checkbox then accessories details fields is visible and that should be mandatory
2. Now see the results,it fulfills our requirements.

This screenshot shows the same ServiceNow interface as the previous one, but with a key difference: the 'Additional Accessories' checkbox is now checked. As a result, a new field labeled 'Accessories Details' has appeared below the 'Justification' field. All other elements, including the sidebar with 'Order Now' and the empty shopping cart, remain the same.

Conclusion :

By utilizing ServiceNow's Service Catalog features, the Laptop Request Catalog Item project effectively expedites the organization's laptop request process. Through the installation of a dynamic catalog item, the project ensures that users have an intuitive and user-friendly interface, decreasing errors and enhancing productivity. This project shows how automated, effective, and user-centric solutions may be utilized to replace manual, error-prone operations with ServiceNow. By offering a contemporary and efficient request process, it not only raises employee happiness but also improves service delivery.