

# Laptop Request Catalog Item in ServiceNow

## Project Documentation Format

### 1.Introduction

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- **Project Name :** Laptop Request Catalog Item
- **Team ID :** LTVIP2025TMD29856
- **Team Leader :** Revathi Bomma
- **Team Members :** Radhika Mala , Sravanthi K , K Supriya

### 2. Project Overview

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- **Objective:**

To simplify and streamline the laptop request process for employees by creating a dynamic ServiceNow catalog item with validation, reset functionality, and audit tracking for governance and deployment.

- **Description:**

- This project creates a user-friendly catalog item within ServiceNow to enable employees to request laptops. It eliminates manual inefficiencies by introducing form logic, guided inputs, dynamic visibility of fields based on user selections, and form reset capability. All submissions are tracked, and the request lifecycle is automated through workflows and approvals.

- **Key features:**

Feature	Description
Catalog Item Creation	Enables users to raise requests via a clean, guided form.
Dynamic Form Behavior	Fields show/hide based on selected laptop type or department.
Form Validation	Mandatory fields and valid options ensure proper data collection.
Reset Button	Clears all fields instantly for re-entry.
Workflow Automation	Routes requests through approval chains based on roles or departments.
Audit & Tracking	All actions logged for traceability and governance.

Notifications	Sends updates to requestor and approvers.
Role-Based Access	Only authorized users can access or approve requests.

### 3. Project Ideation Phase

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- **Project Title:** Laptop Request Catalog Item in ServiceNow
- **Problem Statement:** Employees require a simplified, quick process to request work laptops. The existing manual method causes delays and lacks dynamic validation. This project addresses the need by automating the request process through a ServiceNow catalog item with enhanced user experience, form logic, and audit control.

### 4. Requirement Analysis Phase

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- **Tables:** Use existing sc\_req\_item table to store request records.
- **Catalog Item:** Create a new Service Catalog item for laptop request.
- **Client Scripts & UI Policies:** Implement logic for dynamic field display.
- **Workflow:** Automate approval and fulfillment stages.
- **Reset Button:** Add catalog client script for resetting fields.
- **Access Control:** Restrict visibility of request forms and tasks based on roles.
- **Tracking:** Enable audit logs and activity tracking.
- **Conclusion:** Ensure the form is user-friendly, functional, and audit-compliant.

### 5. Project Planning Phase

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- **Project Timeline:**
  - Ideation
  - Requirement Analysis
  - Design (Form fields, UI policies, Client Scripts)
  - Development (Catalog item, workflows)
  - Testing (Impersonation, field behavior)
  - Review & Finalization

- **Risk Management:**

Risk	Probability	Impact	Mitigation Strategy
Workflow not triggering properly	Medium	High	Test workflows independently in sub-prod
Reset button fails	Low	Medium	Add fallback catalog client script
Field visibility not dynamic	Medium	High	Use combinations of UI Policies and scripts

- **Task Allocation:**

Task	Assigned To	Time Estimate	Tools Required
Catalog Item Design	Developer	1 Day	ServiceNow Studio
Client Script Development	Developer	2 Days	Catalog Client Scripts
Workflow Configuration	Admin	2 Days	Flow Designer
Reset Button Implementation	Developer	1 Day	Catalog UI Script
Testing & Review	QA Analyst	1 Day	User Impersonation

## 6. Project Design Phase

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### 1. Create Catalog Item

- Navigate to **System Update Sets > Local Update Sets**
- Click on **New**, provide a name like Laptop Request Form Update Set
- Save and set it as the current update set
- This will track all changes made during development for easy migration to other instances

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	2025-06-27 09:20:12
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 00:00:00

## 2. Create Service Catalog Item

- Go to **Service Catalog > Maintain Items**
- Click **New** to create a new Catalog Item
- Fill in:
- **Name:** Laptop Request Form
- **Catalog:** Service Catalog
- **Category:** Hardware or Employee Services
- Save the item

**Item Details** | Process Engine | Picture | Pricing | Portal Settings

Name:

Application:

Catalogs:

Category:

State:

Checked out:

Owner:

Active: ☒

Fulfillment automation level:

Short description:

Description: 

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### 3. 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 configuring a variable. The left sidebar contains a navigation menu with options like 'Service Fulfillment Steps Co...', 'Scriptable Order Guide Failu...', 'Execution Plans', 'Properties', 'Request Parent Mapping', 'Fulfillment Groups', 'Catalog Client Scripts', 'Service Catalog Entries', 'Catalog UI Policies', 'Request Reports', 'My Request Filter', 'User Criteria Diagnostics', 'Debug UI Customization', 'Disable UI Customization D...', 'Enable Variable Action Logger', 'Disable Variable Action Log...', 'Catalog Variables', and 'All Variables'. The main content area is titled 'Variable Laptop Model' and includes a search bar and action buttons (Copy, Update, Delete). The configuration fields are as follows:

Field	Value
Application	Global
Map to field	<input type="checkbox"/>
Type	Single Line Text
Catalog Item	Laptop Request
Order	100
Active	<input checked="" type="checkbox"/>
Mandatory	<input type="checkbox"/>
Read only	<input type="checkbox"/>
Hidden	<input type="checkbox"/>
Unique	<input type="checkbox"/>

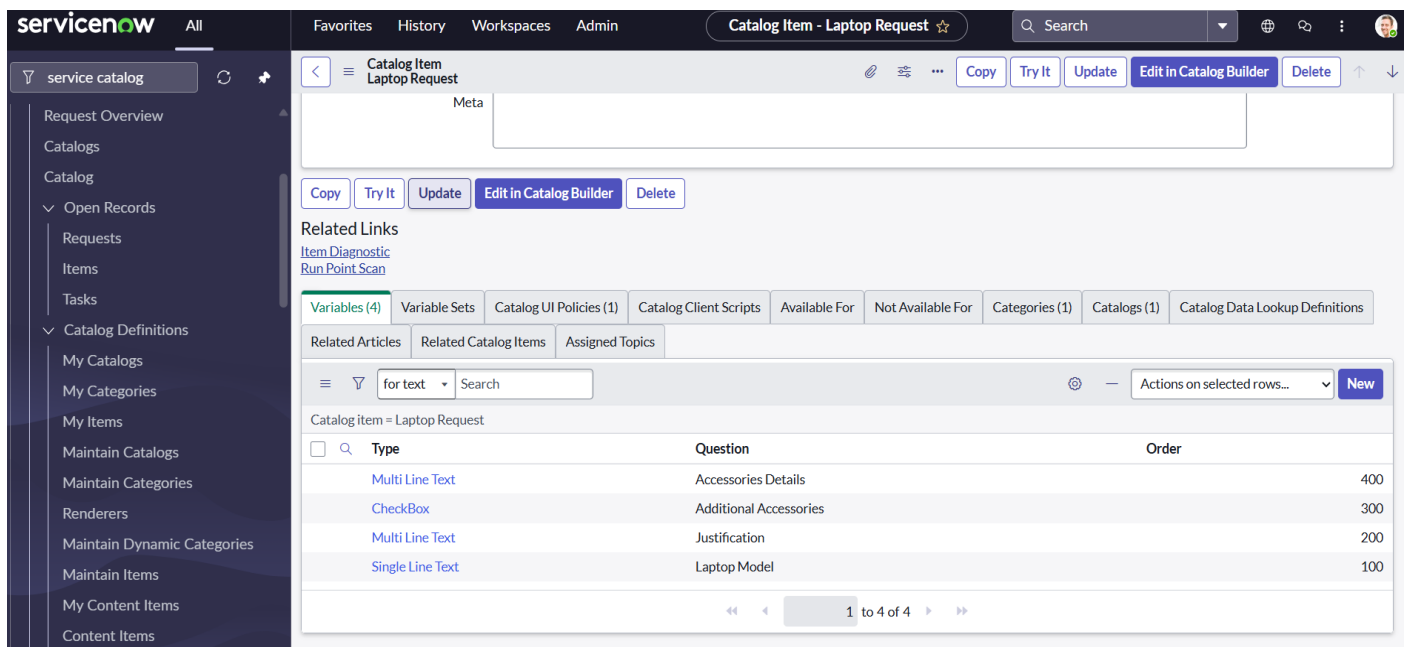
Below the configuration fields, there are tabs for 'Question', 'Annotation', 'Type Specifications', 'Default Value', 'Auto-populate', 'Permission', and 'Availability'. The 'Question' tab is selected, showing the following fields:

Field	Value
* Question	Laptop Model
* Name	laptop_model
Conversational label	
Tooltip	
Example Text	

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

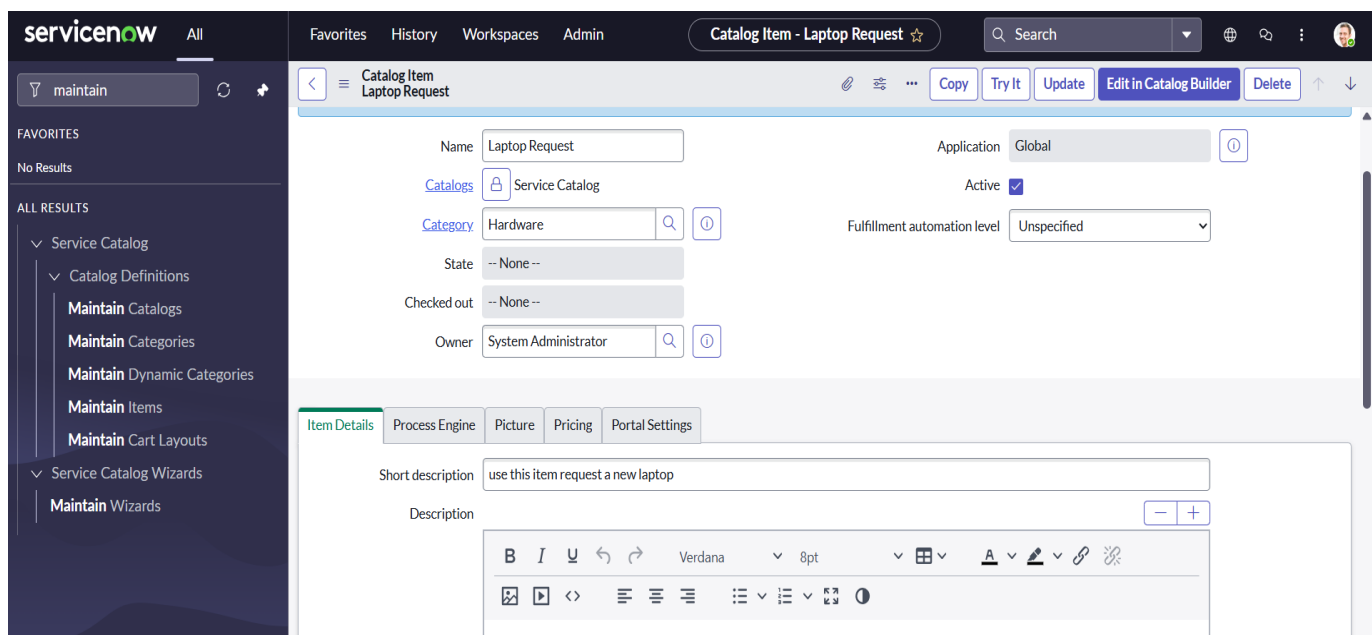
#### Step2:

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



## 4. 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

The screenshot shows the 'Catalog UI Policy - Show Accessories Details' form in ServiceNow. The left sidebar displays the navigation menu with 'Catalog UI Policies' selected. The main form area contains the following fields and options:

- Applies to:** A Catalog Item (dropdown)
- Application:** Global (dropdown)
- \* Catalog item:** Laptop Request (text input)
- \* Short description:** Show Accessories Details (text input)
- Active:** ☒

Below these fields is a section titled 'When to Apply' with a 'Script' tab. It contains a list of conditions that must be met for the policy to apply:

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

The 'Catalog Conditions' section shows a single condition: 'additional\_accessories' is true. Below this, there are checkboxes for 'Applies on a Catalog Item view' (checked), 'Applies on Catalog Tasks' (unchecked), and 'Applies on Requested Items' (unchecked). A note states: 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form'. The 'On load' checkbox is checked.

This screenshot shows the same 'Catalog UI Policy - Show Accessories Details' form, but with the 'Save' button clicked. A dropdown menu is visible over the 'When to Apply' section, listing various actions:

- Save
- Insert
- Insert and Stay
- Insert with Actions
- Analyze Access
- Show File Properties
- Move to Application...
- Show Latest Update
- Configure
- Export
- View
- Create Favorite
- Copy URL
- Copy sys\_id
- Show XML
- History
- Reload form

The form content remains the same as in the previous screenshot, including the conditions and checkboxes.

## 5. 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 form  
Client : checked

Script:

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

6. Click on save

The screenshot shows the ServiceNow interface for creating a new UI Action. The left sidebar contains a navigation menu with 'All' selected, showing a search for 'ui action' with no results. The main area is titled 'UI Action - Reset Form' and contains the following fields:

- 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:**
- 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 --

Buttons for 'Update' and 'Delete' are visible in the top right corner.



## 6. 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 displays the ServiceNow interface for an 'Update Set - Laptop Request'. The left sidebar shows the navigation menu with 'update' selected. The main form contains the following fields:

- Name: Laptop Request
- State: Complete
- Application: Global
- Created: 2025-07-04 10:19:48
- Created by: admin
- Merged to: (empty)
- Release date: (empty)
- Install date: (empty)
- Installed from: (empty)
- Description: (empty text area)

Below the form are 'Update' and 'Back Out' buttons. The 'Related Links' section includes:

- [Export to XML](#)
- [Merge With Another Update Set](#)
- [Scan Update Set](#)

At the bottom, there are tabs for 'Customer Updates (10)', 'Update Set Logs', and 'Child Update Sets'. A search bar with 'Created' and a dropdown for 'Actions on selected rows...' are also visible.

## 7. 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

ServiceNow

Retrieved Update Sets

Name	Application	State	Update source	Description	Loaded	Committed	Parent	Remote Batch Base
Laptop Request	Global	Committed	(empty)		2025-07-04 10:54:11	2025-07-04 10:55:11	(empty)	(empty)

Related Links

[Import Update Set from XML](#)

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

ServiceNow

Import XML

Importing records from an XML file will not run Business Rules

Step 1: Choose file to upload

\* XML file  No file chosen

Step 2: Upload the file

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

**servicenow** All

Favorites History Workspaces Retrieved Update Set - Laptop Request

update

FAVORITES  
No Results

ALL RESULTS

- System Data Management
- Update Jobs
- System Update Sets
- Update Sources
- Retrieved Update Sets
- Update log
- Local Update Sets
- Merge Update Sets
- Merge Completed Sets
- Update Sets to Commit
- Update Set Commit History

Retrieved Update Set  
Laptop Request

Name: Laptop Request  
Application: Global  
Update source:  
Parent:  
State: Committed  
Loaded: 2025-07-04 10:54:11  
Description:  
Application name: Global

Committed: 2025-07-04 10:55:11  
Inserted: 0  
Updated: 10  
Deleted: 0  
Collisions: 0  
Total: 10

Update Delete

Related Links  
[Show Commit Log](#)  
[Show All Preview Records](#)

Customer Updates (10) Child Update Sets

Name Search

Actions on selected rows...

Remote update set = Laptop Request

**servicenow** All

Favorites History Workspaces Retrieved Update Set - Laptop Request

ServiceNow Service Management

FAVORITES  
No Results

ALL RESULTS

- System Data Management
- Update Jobs
- System Update Sets
- Update Sources
- Retrieved Update Sets
- Update log
- Local Update Sets
- Merge Update Sets
- Merge Completed Sets
- Update Sets to Commit
- Update Set Commit History

Retrieved Update Set  
Laptop Request

Name Search

Actions on selected rows...

Remote update set = Laptop Request

Name	Type	Target name	Table	View	Action
catalog_ui_policy_action_9e0a6b1983a222106cc356d6feaad35b	Catalog UI Policy Action	accessories_details			INSERT_OR_UPDATE
catalog_ui_policy_b849abd583a222106cc356d6feaad352	Catalog UI Policy	Show Accessories Details			INSERT_OR_UPDATE
item_option_new_0df7239583a222106cc356d6feaad333	Variable	Accessories Details			INSERT_OR_UPDATE
item_option_new_12b7eb5583a222106cc356d6feaad3b9	Variable	Additional Accessories			INSERT_OR_UPDATE
item_option_new_2396671583a222106cc356d6feaad37c	Variable	Laptop Model			INSERT_OR_UPDATE
item_option_new_cf17eb1583a222106cc356d6feaad3d2	Variable	Justification			INSERT_OR_UPDATE
sc_cat_item_catalog_6f16ebd183a222106cc356d6feaad347	Catalog Items Catalog	Service Catalog.Laptop Request			INSERT_OR_UPDATE
sc_cat_item_category_6f16ebd183a222106cc356d6feaad34c	Catalog Item Category	Hardware.Laptop Request			INSERT_OR_UPDATE
sc_cat_item_f7c567d183a222106cc356d6feaad3b6	Catalog Item	Laptop Request			INSERT_OR_UPDATE
sys_ui_action_397aa35983a222106cc356d6feaad3a1	UI Action	Reset Form	Shopping Cart [sc_cart]		INSERT_OR_UPDATE

1 to 10 of 10

## 7. 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

The screenshot shows the ServiceNow interface for a 'Laptop Request' item. The left sidebar contains a search bar with 'service catalog' and a list of results under 'ALL RESULTS'. The main content area is titled 'Service Catalog > Hardware > Laptop Request'. It features a form with the following fields:

- Laptop Model:** A text input field.
- Justification:** A large text area.
- Additional Accessories:** A checkbox that is currently unchecked.

On the right side, there is a summary section titled 'Order this Item' with the following details:

- Quantity:** 1
- Delivery time:** 2 Days
- Order Now:** A button.
- Add to Cart:** A button.
- 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.

This screenshot shows the same ServiceNow interface as the previous one, but with the 'Additional Accessories' checkbox checked. This action has triggered the display of a new field:

- \* Accessories Details:** A new text input field that appears below the 'Additional Accessories' checkbox.

The other fields and the right-hand summary section remain the same as in the previous screenshot.

## 8. Conclusion

- The *Laptop Request Catalog Item* was successfully developed and tested using best practices. It features dynamic input handling, reset functionality, and secure deployment using update sets. This ensures fast, error-free laptop requests with complete visibility and audit tracking, improving both user experience and IT governance.