

## Data Flow Diagram (DFD):

A DFD would include entities, processes, data stores, and data flows, typically in a diagram format (with arrows and shapes) showing how data moves through the system — for example:

- Users submitting a request
- Data moving to the Service Catalog
- Approval workflows
- Provisioning and delivery

## Users :

Role	Responsibility
------	----------------

- |                      |  |
|----------------------|--|
| Employee (Requester) |  |
|----------------------|--|

	Initiates the laptop request through the service catalog.
--	---

- |                                 |  |
|---------------------------------|--|
| Service Desk Agent / IT Support |  |
|---------------------------------|--|

	Reviews and processes the request; verifies eligibility or availability.
--	--

- |                       |  |
|-----------------------|--|
| Catalog Administrator |  |
|-----------------------|--|

	Designs and configures the catalog item, UI policies, and UI actions.
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- |                      |  |
|----------------------|--|
| System Administrator |  |
|----------------------|--|

	Creates and manages update sets, exports/imports them between instances.
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Updated set

Service Catalog Item

**Ui policy**

**Ui action**

**Export update set**

**Login to another  
instance**

**Testing**

## MILESTONE 1: UPDATE SET

**Purpose:** Track your changes in ServiceNow.

### Steps:

Create Local Update set

Open service now.

Click on All >> search for update sets

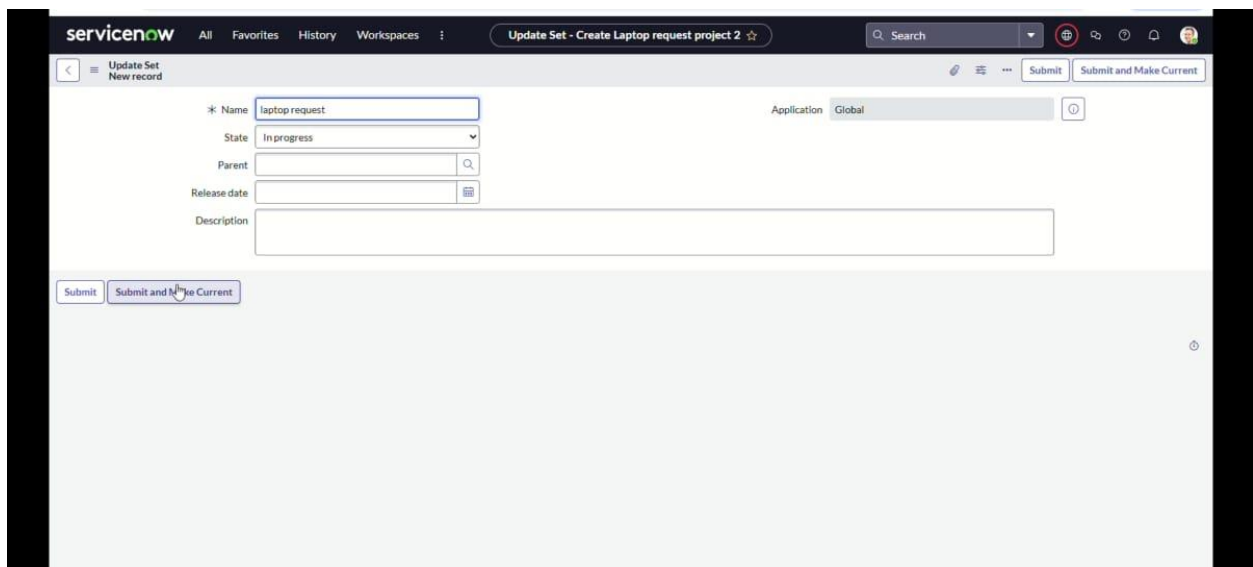
Select local update sets under system update sets

Click on new

Fill the following details to create a update set as: “Laptop Request”

Click on submit and make current

By clicking on the button it activates the update set .



The screenshot shows the ServiceNow interface for creating a new update set. The breadcrumb trail is 'Update Set - Create Laptop request project 2'. The form fields are as follows:

- Name:** laptop request
- State:** In progress (dropdown menu)
- Parent:** (empty field with a search icon)
- Release date:** (empty field with a calendar icon)
- Description:** (empty text area)
- Application:** Global

At the bottom of the form, there are two buttons: 'Submit' and 'Submit and Make Current'. The 'Submit and Make Current' button is highlighted with a mouse cursor.

## MILESTONE 2:

### ACTIVITY 1: SERVICE CATALOG ITEM

**Purpose: Create the actual item that end-users will request.**

**Steps:**

Create Service Catalog Item

Open service now.

Click on All >> service catalog

Select maintain items under catalog definitions

Click on New.

Fill the following details to create a new catalog item

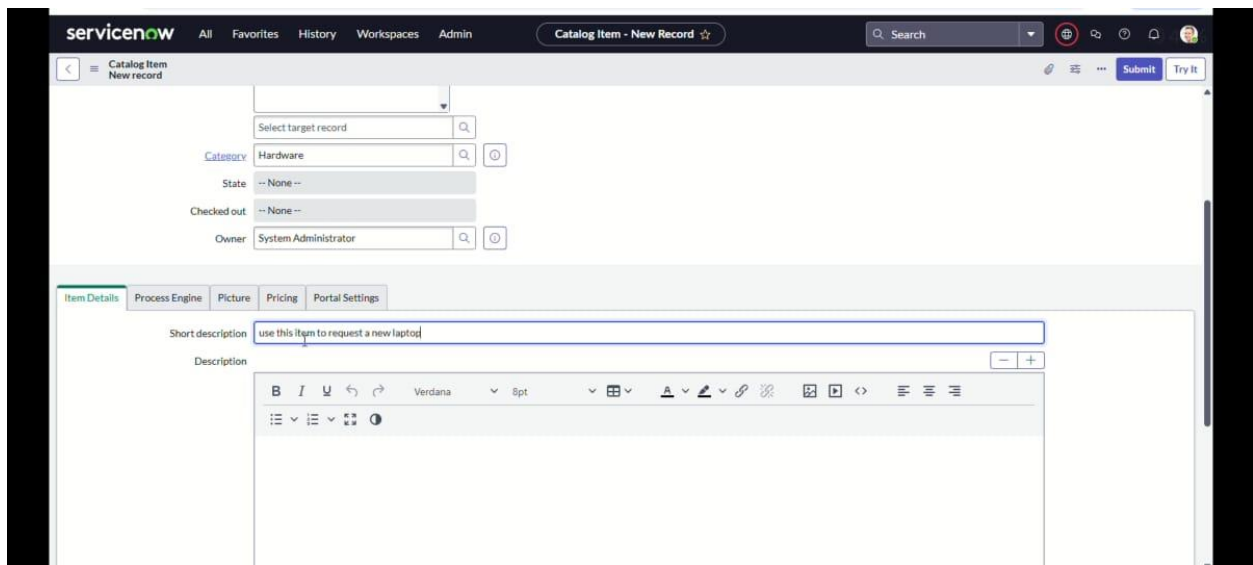
Name: Laptop Request

Catalog: service Catalog

Category: Hardware

Short Description: Use this item to request a new laptop

Click on 'SAVE'



The screenshot shows the ServiceNow 'Catalog Item - New Record' form. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', 'Admin', and a search bar. The main form area has a 'Catalog Item - New Record' header with a 'Submit' button. Below the header, there are several input fields: 'Select target record' (with a search icon), 'Category' (set to 'Hardware'), 'State' (set to '-- None --'), 'Checked out' (set to '-- None --'), and 'Owner' (set to 'System Administrator'). Below these fields, there are tabs for 'Item Details', 'Process Engine', 'Picture', 'Pricing', and 'Portal Settings'. The 'Item Details' tab is active, showing a 'Short description' field with the text 'use this item to request a new laptop' and a 'Description' field with a rich text editor toolbar.

## ACTIVITY 2: VARIABLES

**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

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

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

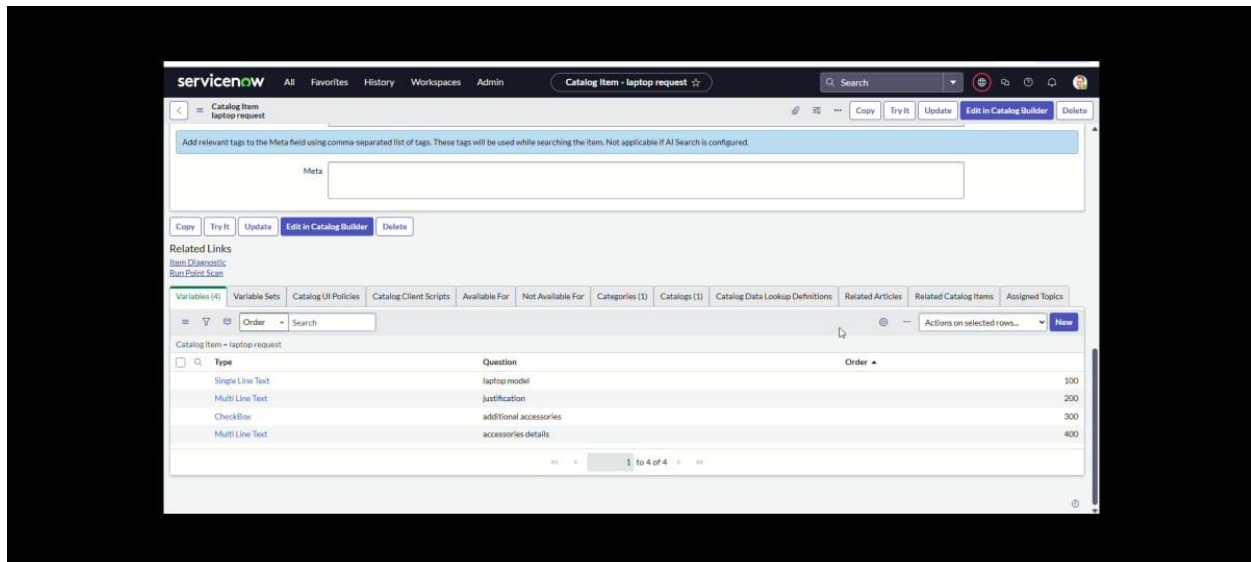
Name: Accessories\_details

Order:400

### Step2:

After adding above variable which are added to newly created catalog item

Then save the catalog item form



## MILESTONE 3: UI POLICY

### Steps:

Click on all>> search for service catalog

Select maintain item under catalog definition

Search for 'laptop request' which is created before

Select 'laptop request' and scroll down click on "Catalog UI policies"

In the catalog ui policies related list tab click on new

Give short description as: show accessories details

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 - show accessories details' configuration page in ServiceNow. The page is divided into several sections:

- Header:** Includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces), and a search bar.
- Additional actions:** A section with a description: 'Additional actions 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](#)'. It includes fields for 'Applies to' (A Catalog Item), 'Application' (Global), 'Catalog item' (laptop request), 'Active' (checked), and 'Short description' (show accessories details).
- When to Apply:** A tabbed section with 'Script' selected. It contains a list of conditions: '1. The catalog UI policy is Active', '2. The items in the Conditions field evaluate to true', and '3. The field specified in the catalog UI policy is present on the specified catalog item'.
- Catalog Conditions:** A section with 'Add Filter Condition' and 'Add OR Clause' buttons. It shows a condition: 'additional\_accessories' is 'true'.
- Applies on a Catalog Item view:** A checkbox that is checked.
- Applies on Catalog Tasks:** A checkbox that is unchecked.
- Applies on Requested Items:** A checkbox that is unchecked.
- Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form:** A section with 'On load' checked and 'Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false' unchecked.
- Reverse if false:** A checkbox that is checked.

Click on save.(do not click on submit)

Scroll down and select 'catalog ui action'

Then click on new button

Select variable name as: accessories\_details

Order:100

Mandatory: True

Visible : True

Click on save and again click save button of the catalog Ui policy form

## MILESTONE 4:UI ACTION

**Steps:**

**Open service now.**

## Click on All >> search for Ui action

Select ui actions under system definition

Click on new

Fill the following details to create ui action

Table: shopping cart(sc\_cart)

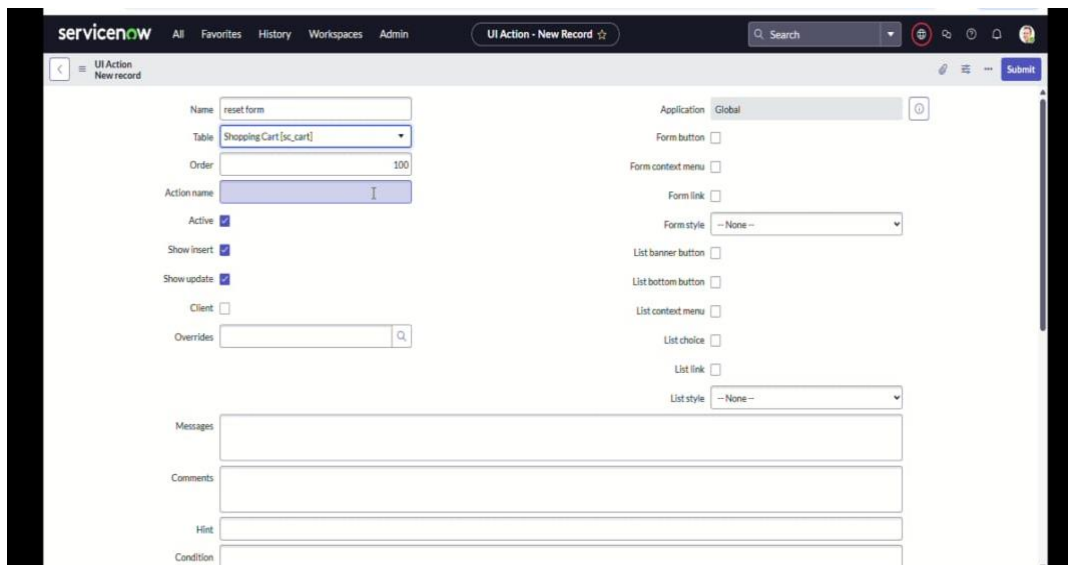
Order:100

Action name: Reset form

Client : checked

Script:

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



The screenshot shows the 'UI Action - New Record' form in ServiceNow. The form is divided into two main sections: 'Form' and 'List'. The 'Form' section includes fields for 'Name' (reset form), 'Table' (Shopping Cart [sc\_cart]), 'Order' (100), 'Action name' (Reset form), 'Active' (checked), 'Show insert' (checked), 'Show update' (checked), 'Client' (checked), and 'Overrides' (empty). The 'List' section includes fields for 'Application' (Global), 'Form button' (unchecked), 'Form context menu' (unchecked), 'Form link' (unchecked), 'Form style' (None), 'List banner button' (unchecked), 'List bottom button' (unchecked), 'List context menu' (unchecked), 'List choice' (unchecked), 'List link' (unchecked), and 'List style' (None). At the bottom, there are text areas for 'Messages', 'Comments', 'Hint', and 'Condition'.

Click on save

## Export Update Set

**Purpose: Package all changes to migrate to another instance.**

## MILESTONE 5: EXPORT UPDATE SET



**Steps:**

**Click on All >> search for update sets**

**Select local update set**

**Select created update set i.e. 'Laptop Request Project'**

**Set the state to 'Complete'**

**In the related list Update tab, updates are visible which we perform under this update set.**

**Click on export to XML ,it download one file**

**Purpose: Transfer changes to a test or production instance.**

## **MILESTONE 6: LOGIN TO ANOTHER INSTANCE**

**Steps:**

**Open another instance in incognito window**

**Login with credentials**

**Click on all>> search for update sets**

**Select "Retrieved update set" under system update set**

**It open retrieved update set list and scroll down**

**Click on Import update set from XML**

**Upload the downloaded file in XML file**

**Click on Upload and it gets uploaded.**

**Open retrieved update set 'laptop request project'**

**Click on preview update set**

**And click on commit update set**

**And also see the related tab updates**

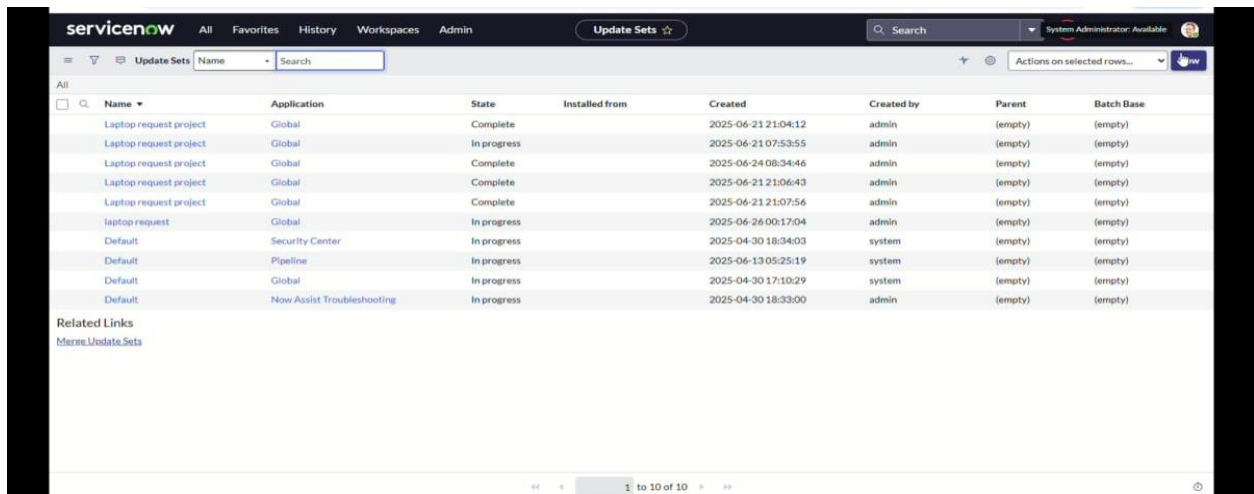
After committing update set in this instance we get all updates which are done in the previous instance

Log into another ServiceNow instance

Navigate to Retrieved Update Sets

Import XML file

Preview & Committee



Name	Application	State	Installed from	Created	Created by	Parent	Batch Base
Laptop request project	Global	Complete		2025-06-21 21:04:12	admin	(empty)	(empty)
Laptop request project	Global	In progress		2025-06-21 07:53:55	admin	(empty)	(empty)
Laptop request project	Global	Complete		2025-06-24 08:34:46	admin	(empty)	(empty)
Laptop request project	Global	Complete		2025-06-21 21:06:43	admin	(empty)	(empty)
Laptop request project	Global	Complete		2025-06-21 21:07:56	admin	(empty)	(empty)
Laptop request	Global	In progress		2025-06-26 00:17:04	admin	(empty)	(empty)
Default	Security Center	In progress		2025-04-30 18:34:03	system	(empty)	(empty)
Default	Pipeline	In progress		2025-06-13 05:25:19	system	(empty)	(empty)
Default	Global	In progress		2025-04-30 17:10:29	system	(empty)	(empty)
Default	Now Assist Troubleshooting	In progress		2025-04-30 18:33:00	admin	(empty)	(empty)

Related Links

[Merge Update Sets](#)

## 7. Testing

Purpose: Ensure the form works properly.

## MILESTONE 7: TESTING

Steps:

Search for service catalog in application navigator in target instance

Select catalog under service catalog

Select hardware category and search for 'laptop request' item

Select laptop request item and open it

It shows three variables only

As per our scenario, when we click on additional accessories checkbox then accessories details fields is visible and that should be mandatory

Now see the results, it fulfills our requirements.

servicenow

AllFavoritesHistoryWorkspacesAdmin

laptop request

Search

Search catalog

Service Catalog > Top Requests > laptop request

Use this item to request a new laptop

Exists in categories

laptop model

Justification

Additional Accessories

Accessories details

Order this Item

Quantity1

Delivery time2 Days

Order Now

Add to Cart

Shopping Cart

Empty