

Laptop Request Catalog Item

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Team Size : 4

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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.

Category

ServiceNow System Administrator.

Skills

UIPath RPA, Tanzu Application Service

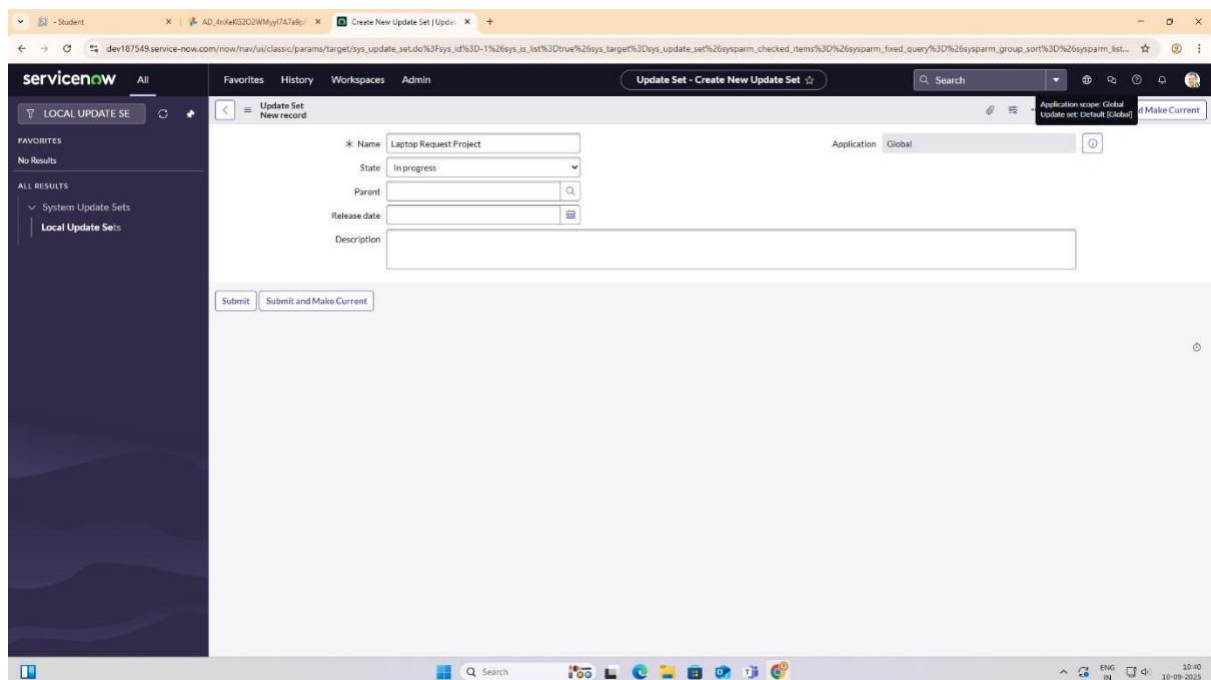
TASK INITIATION Milestone 1: Create Local Update Set

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 displays 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_set%3Dtrue%26sys_target%3Dsys_update_set%26sysperm_checked_items%3D%26sysperm_fixed_query%3D%26sysperm_group_sort%3D%26sysperm_set...`. The page title is "Update Set - Create New Update Set". The left sidebar shows "LOCAL UPDATE SET" and "System Update Sets". The main form area contains the following fields:

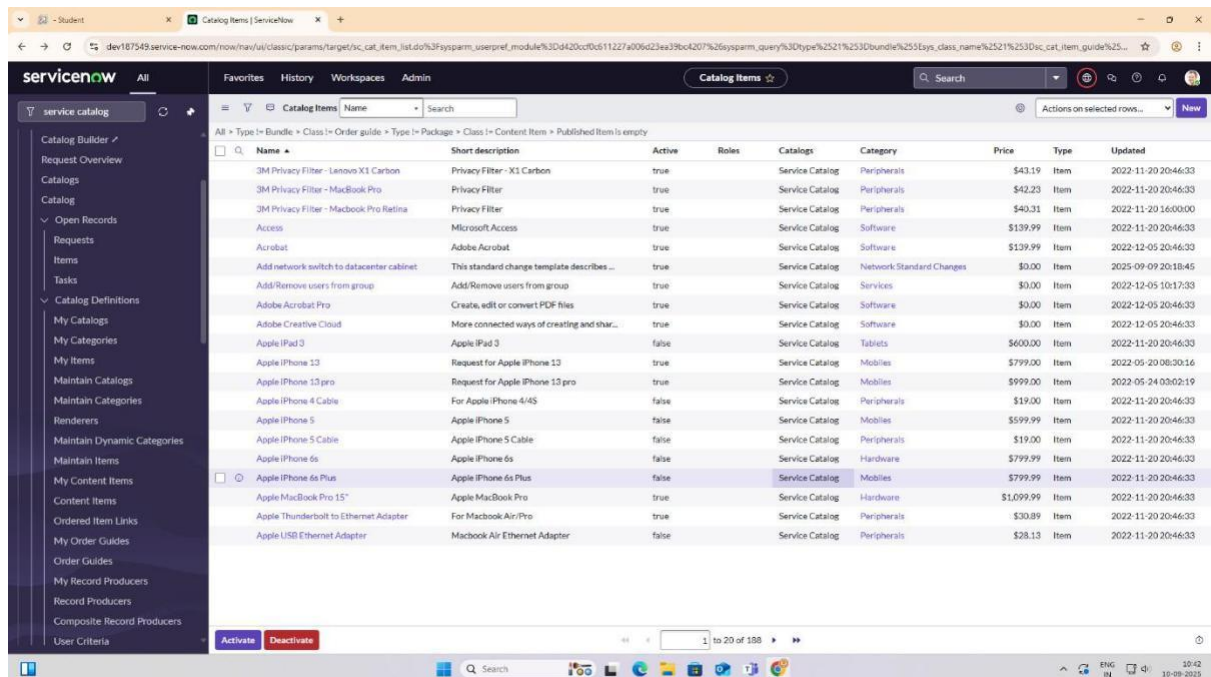
- Name: Laptop Request Project
- State: In progress
- Parent: (empty field with a search icon)
- Release date: (empty field with a calendar icon)
- Description: (empty text area)

At the bottom of the form, there are two buttons: "Submit" and "Submit and Make Current". The "Application" field is set to "Global".

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

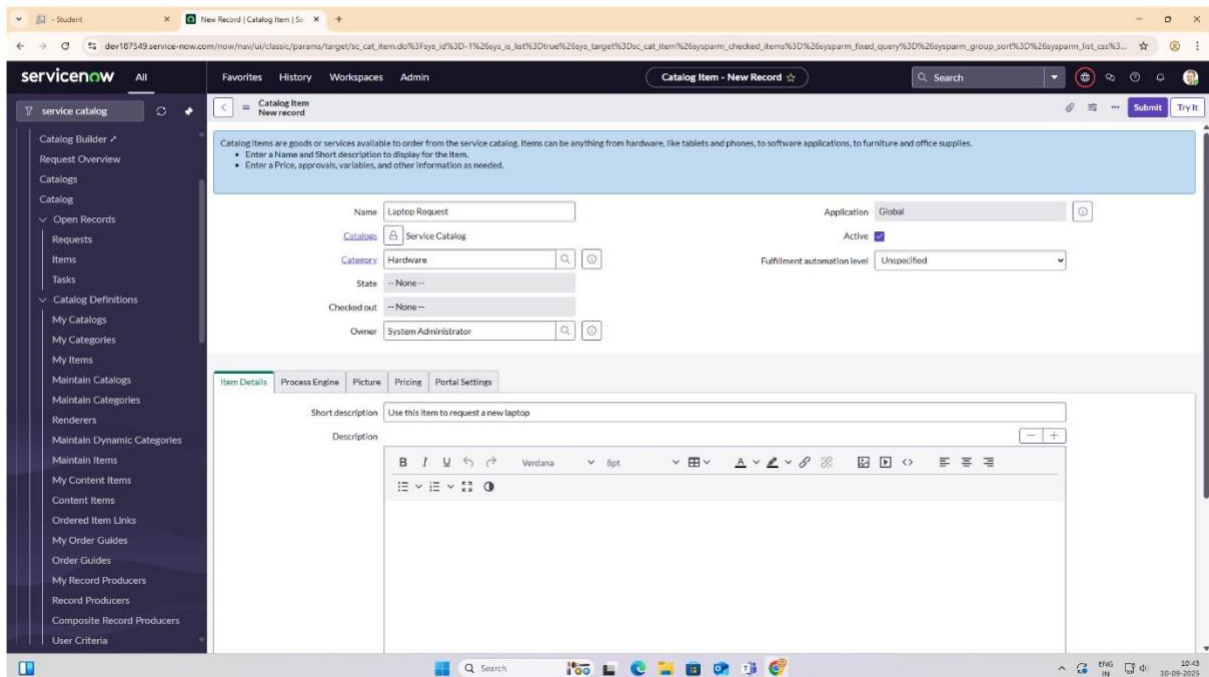
Name: Laptop Request

Catalog: service Catalog

Category: Hardware

Short Description: Use this item to request a new laptop

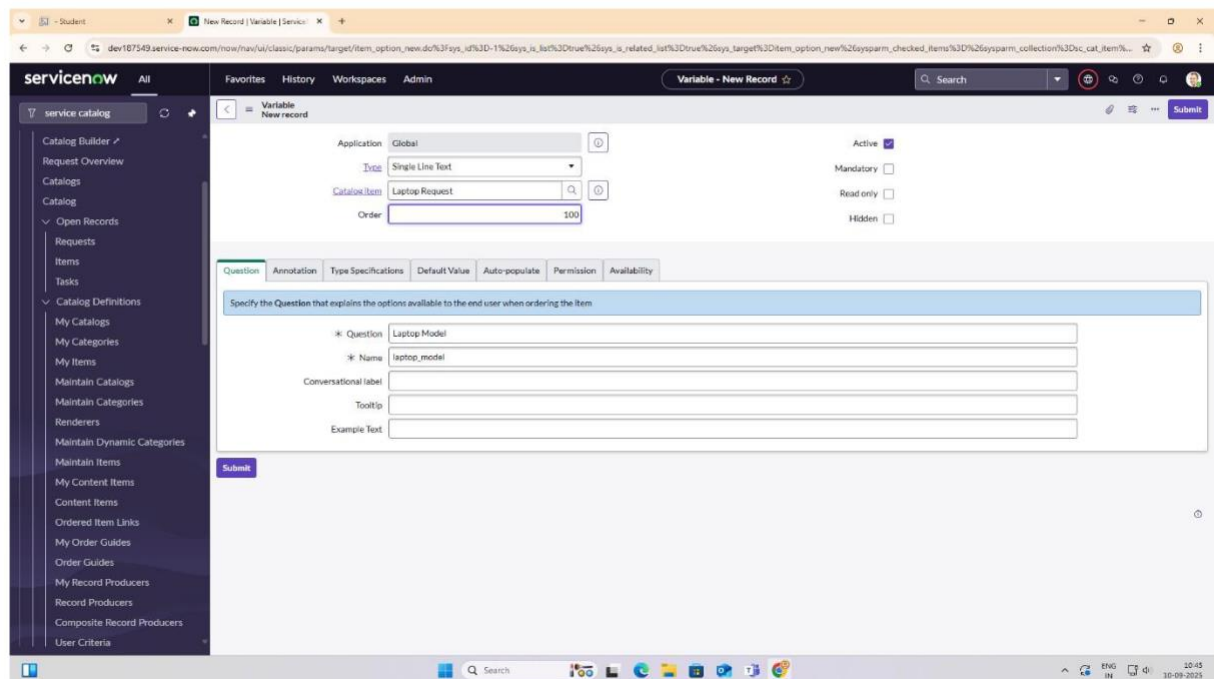
6.Click on 'SAVE'



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

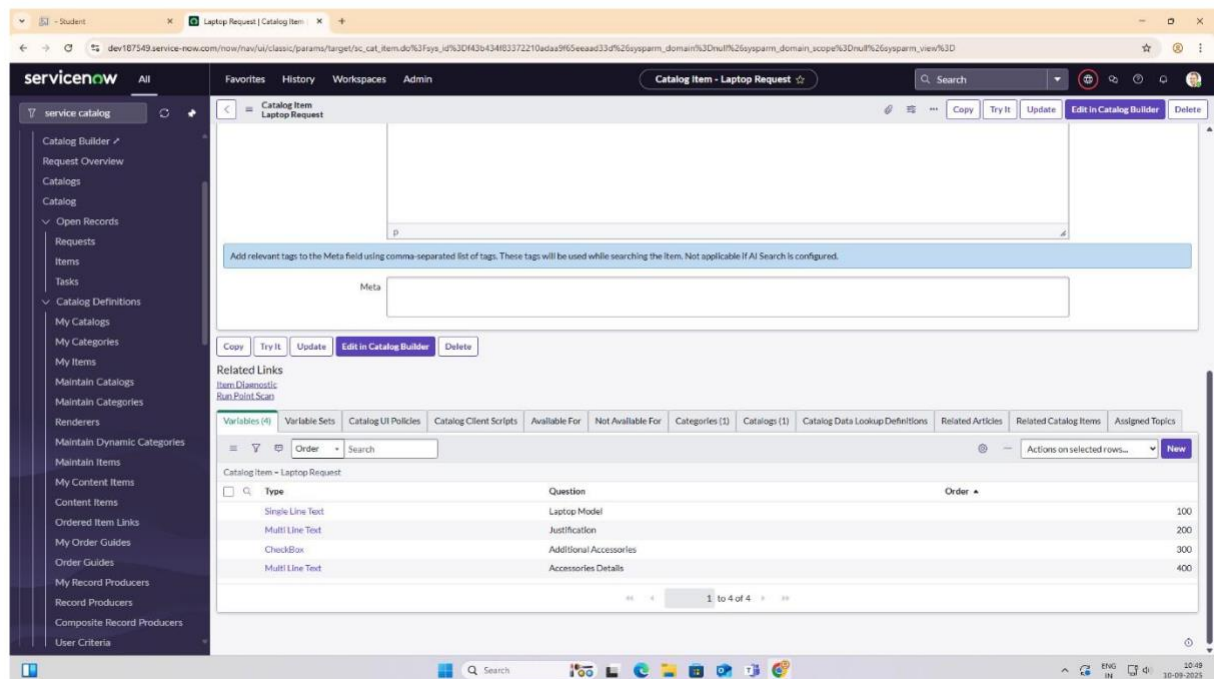
Type: Multi line text

Name:accessories_details

Order:400

Step2:

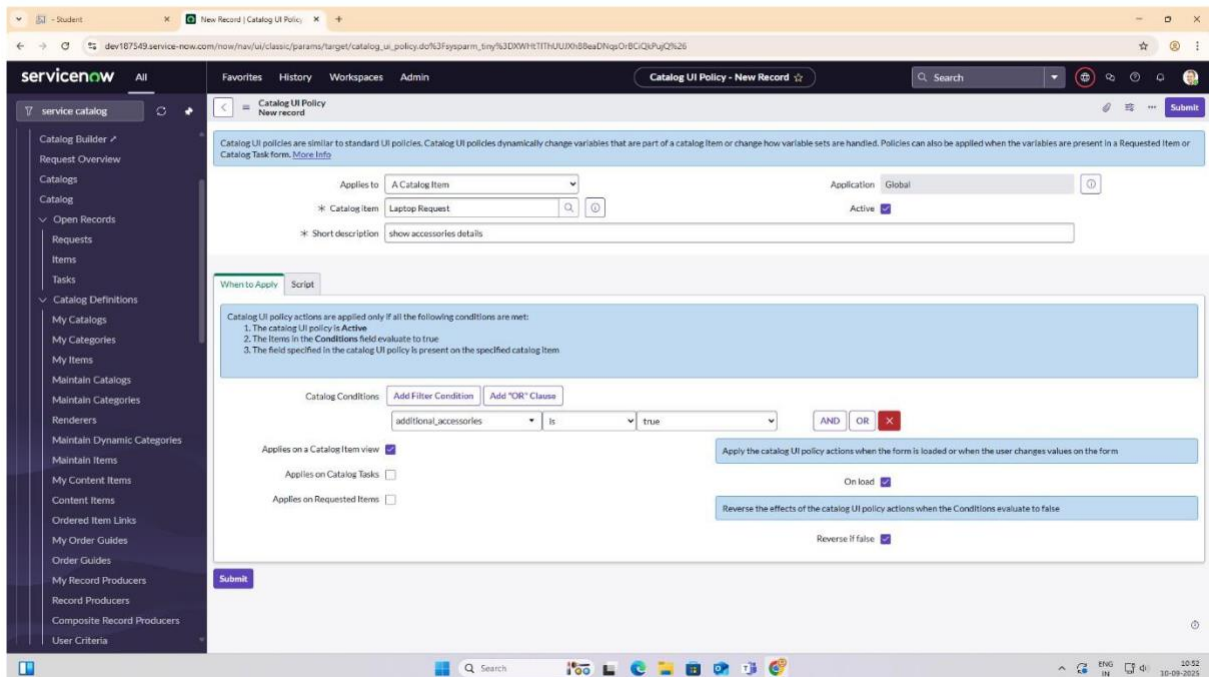
- After adding above variable which are added to newly created catalog item
- Then save the catalog item form



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

0. Click on save and again click save button of the catalog ui policy form

Student | New Record | Catalog UI Policy

dev187549.service-now.com/now/nav/ui/classic/params/target/catalog_ui_policy_action.do%3Fsys_id%3D1%26sys_is_list%3Dtrue%26sys_is_related_list%3Dtrue%26sys_target%3Dcatalog_ui_policy_action%26sysparm_checked_items%3D%26sysparm_collection%3D...

servicenow All

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

[Submit](#)

Student | Reset Form | UI Action | Service

dev187549.service-now.com/now/nav/ui/classic/params/target/sys_ui_action.do%3Fsys_id%3D0e34ec70783b72210adaa9f5eeaad3b8%26sysparm_view%3D%26sysparm_domain%3Dnull%26sysparm_scope%3Dnull

servicenow All

UI Action - Reset Form

UI Action

Reset Form

Name	Reset Form	Application	Global
Table	Shopping Cart [sc_cart]	Form button	<input type="checkbox"/>
Order	100	Form context menu	<input type="checkbox"/>
Action name	Reset Form	Form link	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>	Form style	--None--
Show insert	<input checked="" type="checkbox"/>	List banner button	<input type="checkbox"/>
Show update	<input checked="" type="checkbox"/>	List bottom button	<input type="checkbox"/>
Client	<input checked="" type="checkbox"/>	List context menu	<input type="checkbox"/>
List v2 Compatible	<input checked="" type="checkbox"/>	List choice	<input type="checkbox"/>
List v3 Compatible	<input type="checkbox"/>	List link	<input type="checkbox"/>
Overrides		List style	--None--
Messages			
Comments			
Hint			
OnClick			
Condition			
Script	<pre> 1 function resetForm() { 2 g_form.clearForm(); // Clears all fields in the form 3 alert("The form has been reset."); 4 } </pre>		

[Update](#) [Delete](#)

Milestone 4: Create UI Action

Activity 1: Create Reset Form UI Action

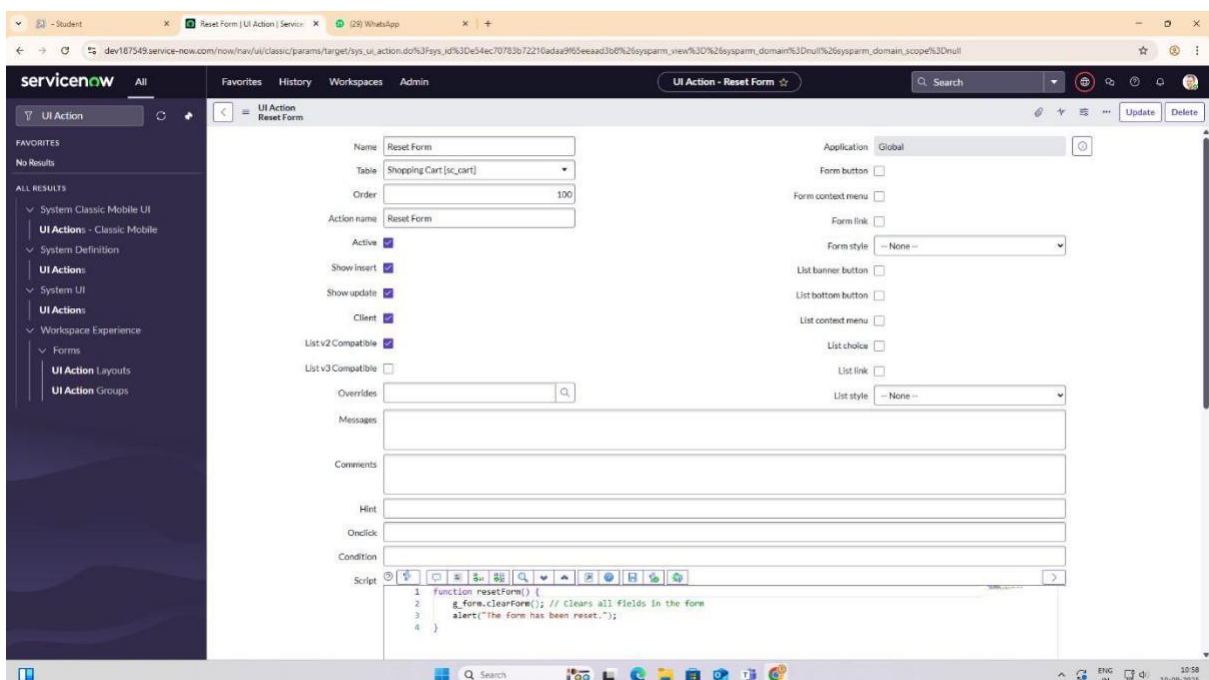
1. Open service now.
2. Click on All >> search for ui action
3. Select ui actions under system definition
4. Click on new
5. Fill the following details to create ui
action Table: shopping cart(sc_cart)
Order:100
Action name: Reset form

Client : checked

Script:

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

Click on save



The screenshot shows the ServiceNow 'UI Action - Reset Form' configuration page. The left sidebar contains a navigation menu with 'UI Action' selected. The main form has 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: (empty)
- Messages: (empty)
- Comments: (empty)
- Hint: (empty)
- OnClick: (empty)
- Condition: (empty)
- Script:

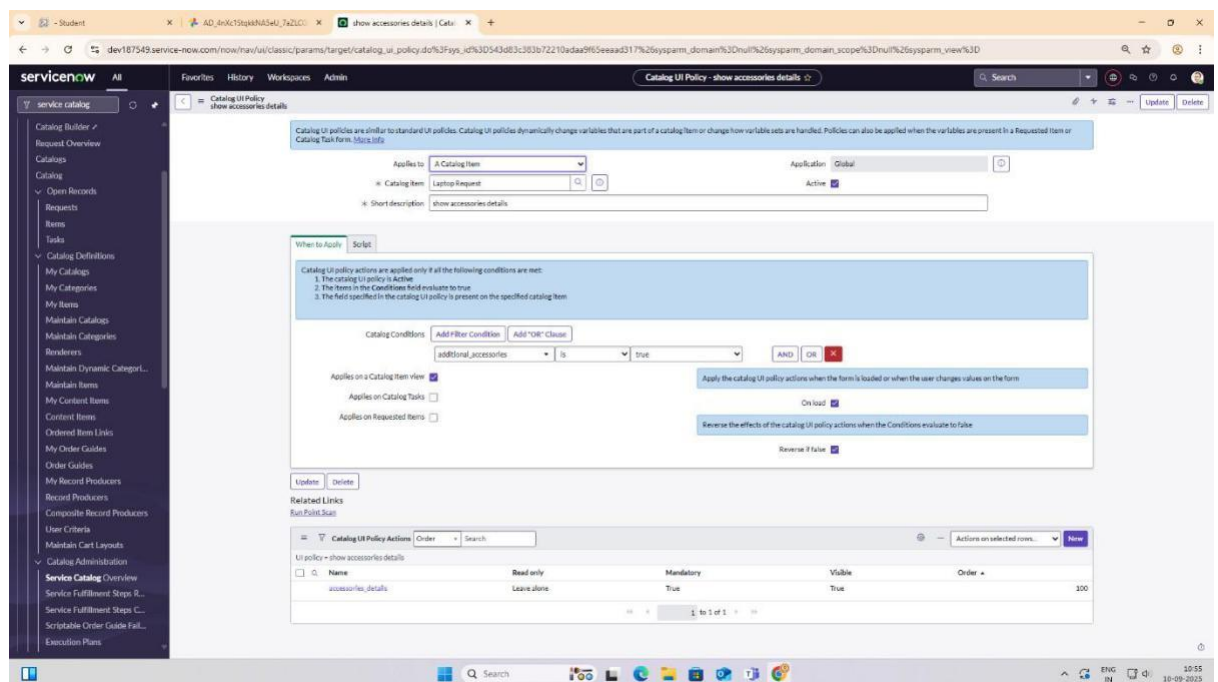
```
1 function resetForm() {  
2   g_form.clearForm(); // Clears all fields in the form  
3   alert("The form has been reset.");  
4 }
```
- Application: Global
- Form button: ☐
- Form context menu: ☐
- Form link: ☐
- Form style: -- None --
- List banner button: ☐
- List bottom button: ☐
- List context menu: ☐
- List choice: ☐
- List link: ☐
- List style: -- None --

The bottom of the page shows the Windows taskbar with the time 10:58 and date 10-09-2023.

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



The screenshot shows the ServiceNow Catalog UI Policy configuration page for the policy named 'show accessories details'. The left sidebar contains the navigation menu with options like Catalog Builder, Request Overview, Catalogs, Open Records, Requests, Items, Tasks, Catalog Definitions, My Catalogs, My Categories, My Items, Maintain Catalogs, Maintain Categories, Renderers, Maintain Dynamic Catalogs, Maintain Items, My Content Items, Content Items, Ordered Item Links, My Order Guides, Order Guides, My Record Producers, Record Producers, Composite Record Producers, User Criteria, Maintain Cart Layouts, Catalog Administration, Service Catalog Overview, Service Fulfillment Steps, Scriptable Order Guide Failures, and Execution Plans.

The main content area displays the policy configuration. At the top, it states: 'Catalog UI policies are similar to standard UI policies. Catalog UI policies dynamically change variables that are part of a catalog item or change how variables are handled. Policies can also be applied when the variables are present in a Requested item or Catalog Task Item.' Below this, there are fields for 'Applies to' (set to 'A Catalog Item'), 'Application' (set to 'Global'), and 'Active' (checked). A 'Short description' field contains 'show accessories details'.

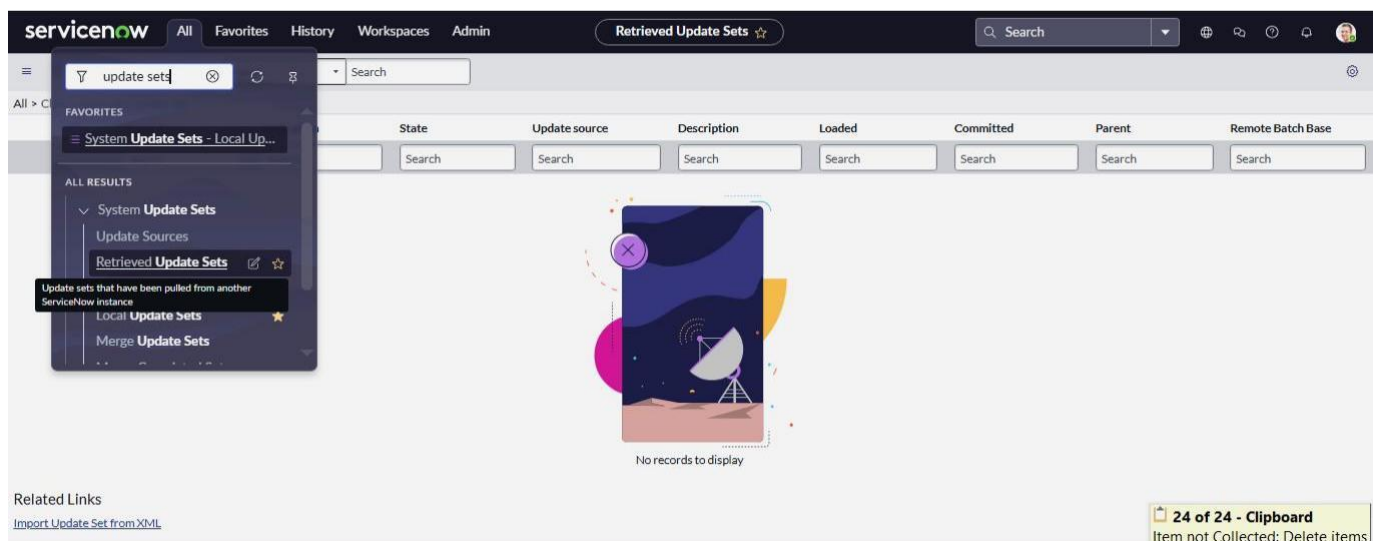
The 'When to Apply' section is set to 'Script'. It lists three conditions: '1. The Catalog UI policy is Active', '2. The item in the Candidate field evaluates to true', and '3. The field specified in the catalog UI policy is present on the specified catalog item'. Below these conditions, there are checkboxes for 'Applies on a Catalog item view' (checked), 'Applies on Catalog Tasks' (unchecked), and 'Applies on Requested Items' (unchecked). There are also buttons for 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form', 'On load' (checked), 'Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false', and 'Reverse if false' (checked).

At the bottom, there is a table titled 'Catalog UI Policy Actions' with columns for Name, Read only, Mandatory, Visible, and Order. The table contains one row with the name 'accessories_details', Read only set to 'Leave alone', Mandatory set to 'True', Visible set to 'True', and Order set to '100'.

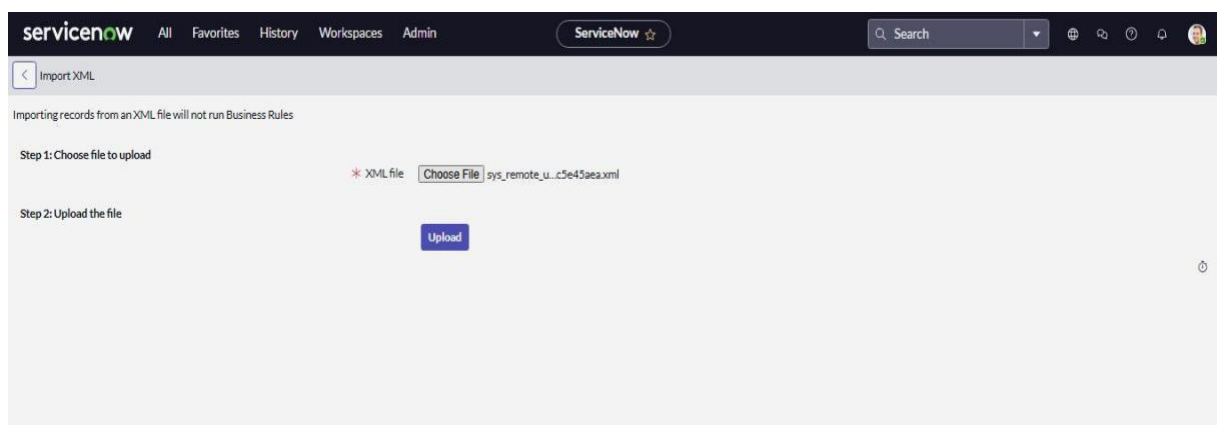
Milestone 6: Retrieving the Update Set

Activity 1: Import Update Set from XML into Another Instance

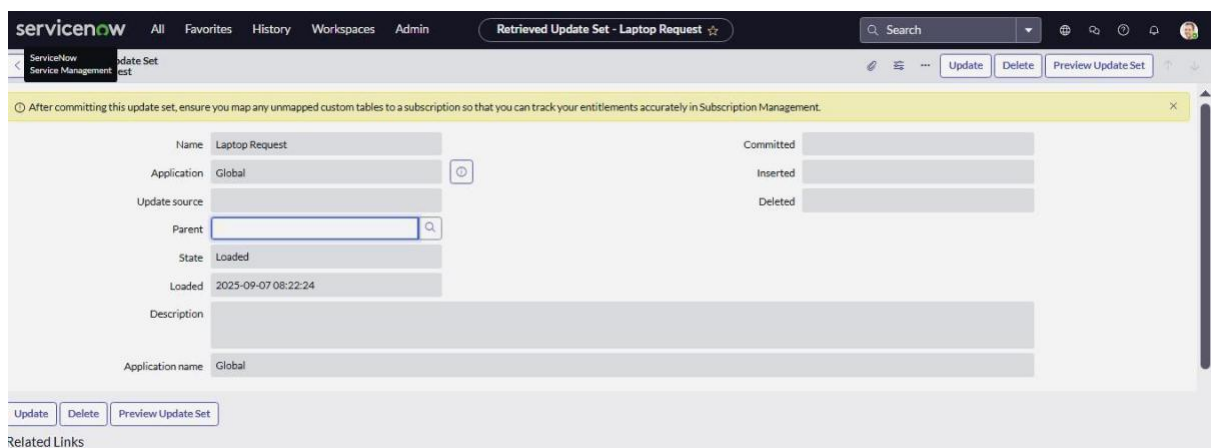
1. Open another instance in incognito window
2. Login with credentials
3. Click on all>> search for update sets
4. Select “Retrieved update set” under system update set
5. It open retrieved update set list and scroll down
6. Click on Import update set from XML



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



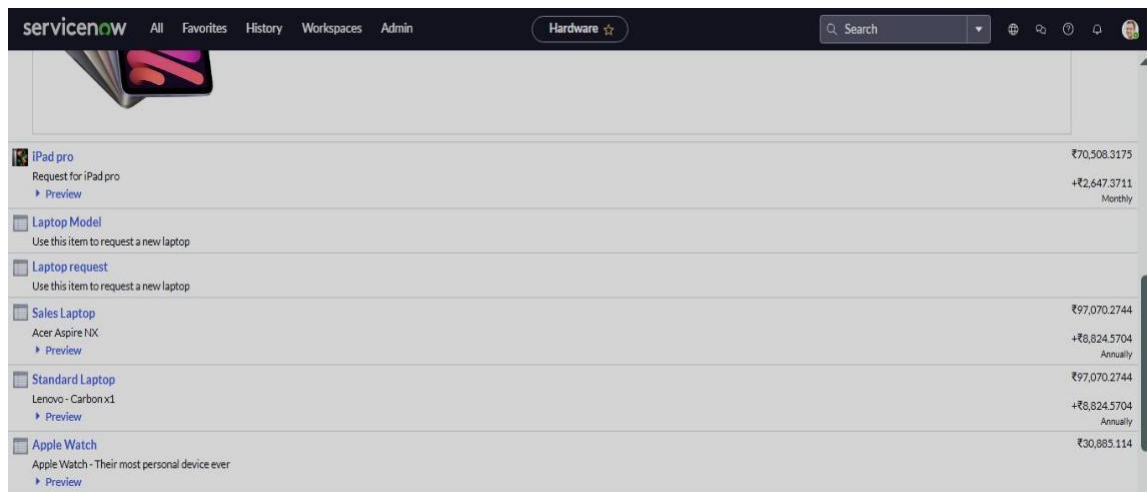
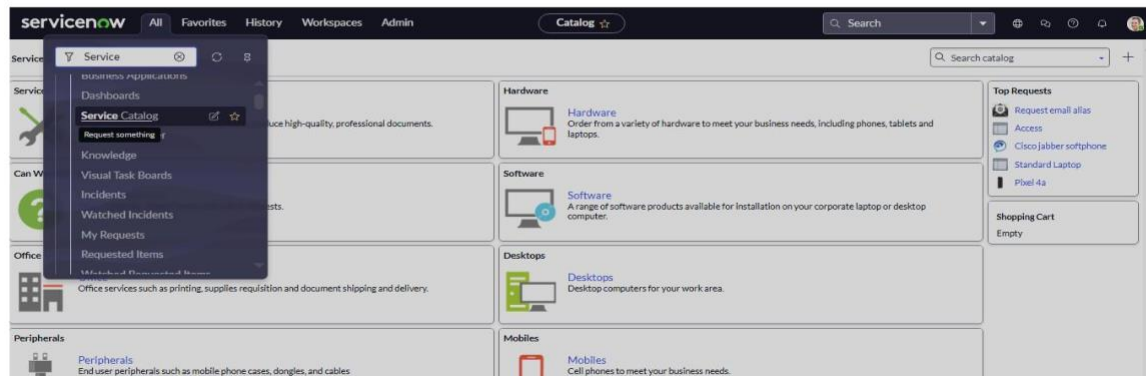
9. Open retrieved update set 'laptop request project'
10. Click on preview update set
11. And click on commit update set
12. And also see the related tab updates
13. After committing update set in this instance we get all updates which are done in the previous instance



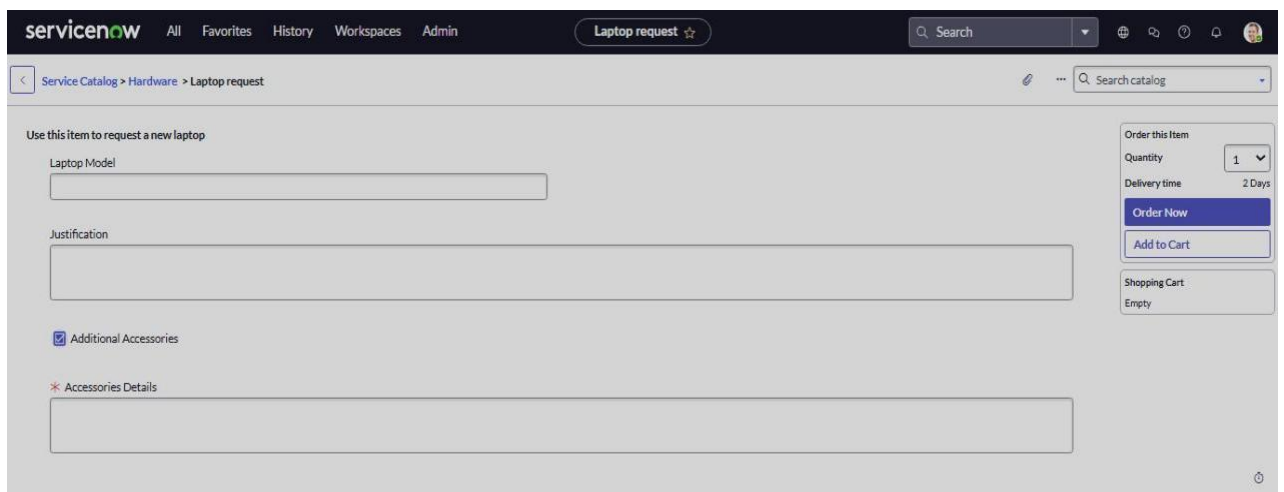
Milestone 7: Test Catalog Item

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.