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LaptopRequest CatalogItem usingServiceNow

Introduction

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.

KeyFeatures

- **UpdateSet:** Create or select an update set to track changes.
- **ServiceCatalogItem:** Create the laptop request item in the Service Catalog.
- **UIPolicy:** Define UI policies to control form behavior
- **UIAction:** Add buttons or links (UI actions) for user interactions.
- **ExportUpdateSet:** Export the update set after completing configurations.
- **LogintoAnotherInstance:** 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**
3. GitHub or other repository (optional) for maintaining documentation and exported update sets

Requirements Function

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 submissions 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

The **Ideation Phase** identifies the need to automate laptop requests using ServiceNow. Stakeholders discuss challenges with manual processes and propose a catalog item with dynamic forms and approvals. Key requirements are outlined, feasibility is assessed, and the idea is approved to move forward.

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 CatalogItem, UI Policies, and UpdateSets.
- Validate and finalize requirements with stakeholders.

ProjectPlanningPhase

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 says "Update Set - Create Laptop Request Project 2". The main area contains the following fields:

- Name: Laptop Request Project 2
- State: In progress
- Parent: (empty)
- Release date: (empty)
- Description: (empty)

At the bottom, there are two buttons: "Submit" and "Submit and Make Current". Above these buttons is a link labeled "Global".

Create Service Catalog Item

1. Open servicenow.
2. Click on All >> servicecatalog
3. Select maintain items under catalog definitions

4. ClickonNew.

The screenshot shows the ServiceNow Catalog Items page. A context menu is open over the first item in the list, "Privacy Filter - X1 Carbon". 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, and Ordered Item Links. The main table lists items such as Privacy Filter, Microsoft Access, Adobe Acrobat, and various iPhone models (iPhone 13, iPhone 13 Pro, iPhone 4 Cable, iPhone 5, iPhone 5 Cable, iPhone 6s, iPhone 6s Plus). The table includes columns for Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated.

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

Fill the following details to create a new catalog item Name:

Laptop Request
Catalog: serviceCatalog
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 Name field is set to "Laptop Request". The Catalog field is set to "Service Catalog". The Category field is set to "Hardware". The Short description field contains the text "Use this item to request a new laptop". Other fields shown include Application (Global), Active (checked), Fulfillment automation level (Unspecified), State (None), Checked out (None), and Owner (System Administrator).

Add variables Step

1:

- After saving the catalog item form scroll down and click on variable (related list)
 - Click on new and enter the details as below
- Variable1:LaptopMode

| Type: Single line text

Name:

laptop_modelOrder:10

0

- Clickonsubmit

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

The screenshot shows the 'Variable - New Record' screen in ServiceNow. At the top, there are tabs for 'Variable' and 'New record'. The main form has the following fields:

- Application:** Global
- Type:** Single Line Text
- Catalog item:** Laptop Request
- Order:** 100
- Active:** checked
- Mandatory:** unchecked
- Read only:** unchecked
- Hidden:** unchecked

Below the main form, there is a tabbed section with 'Question' selected. The 'Question' tab contains the following fields:

- * Question: Laptop Model
- * Name: laptop_model
- Conversational label: (empty)
- Tooltip: (empty)
- Example Text: (empty)

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

2. Variable

2:JustificationType:

Multilinetext Name:

justificationOrder:2

00

3. Variable

3:AdditionalAccessoriesType

: Checkbox

Name:additional_accessoriesOrder:

300

4. Variable4:AccessoriesDet

ails Type: Multi line

textName:accessories_det

ails Order:400

Step2:

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

Servicenow All Favorites History Workspaces Catalog Item - Laptop Request

Mets

Copy Try It Update Edit in Catalog Builder Delete

Related Links Item (2) generic Run Point Scan

Variables (4) Variable Sets Catalog UI Policies Catalog Client Scripts Available For Not Available For Categories (1) Catalogs (1) Catalog Data Lookup Definitions Related Articles Related Catalog Items

Assigned Topics

Catalog Item - Laptop Request

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

1 to 4 of 4

CreateCatalogUiPolicies

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

e Visible : True

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

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

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

①

The screenshot shows the 'Catalog UI Policy - show accessories details' configuration. It includes a 'Catalog Conditions' section with a dropdown for 'additional accessories' set to 'is true'. There are 'AND' and 'OR' buttons. Below this are sections for 'Applies on a Catalog Item view' (checked), 'Applies on Catalog Tasks' (unchecked), and 'Applies on Requested Items' (unchecked). Action sections include 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form' (checked) and 'Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false' (unchecked). A 'Reverse if false' checkbox is also present. At the bottom are 'Update' and 'Delete' buttons.

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.

The screenshot shows the 'Update Set - Laptop Request Project' page. It displays basic information like Name (Laptop Request Project), State (Complete), Application (Global), Created (2025-06-24 06:51:45), and Created by (admin). The 'Customer Updates (10)' tab is selected in the related list, showing a table with columns: Created, Type, View, Target name, Updated by, Remote update set, and Action. The first row shows a created date of 2025-06-24, type of Customer Update, and target name of 'Customer'. At the bottom are 'Update' and 'Back Out' buttons.

Click on export to XML, it download one file

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 opens retrieved update set list and scroll down

6.

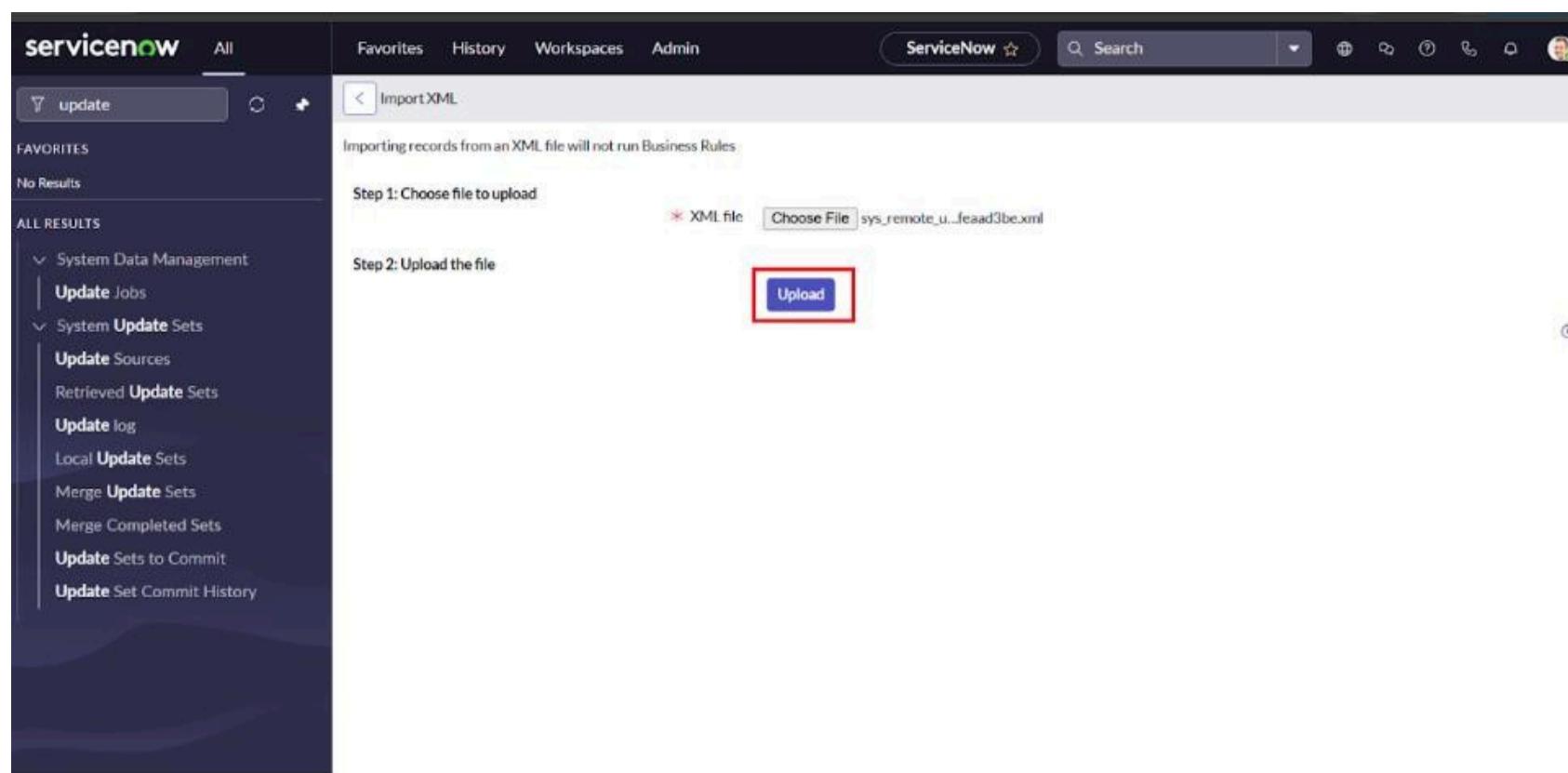
The screenshot shows a ServiceNow interface with the title "Retrieved Update Set - Laptop Request Project". The main area displays a table titled "Customer Updates (10) | Child Update Sets". The table has columns: Name, Type, Target name, Table, View, and Action. The data in the table is as follows:

Name	Type	Target name	Table	Action
catalog_ui_policy_046adb06c3522210a969b1fdd4013102	Catalog UI Policy	show accessories details		INSERT_OR_UPDATE
catalog_ui_policy_action_fd7bd46c3522210a969b1fdd4013146	Catalog UI Policy Action	accessories_details		INSERT_OR_UPDATE
item_option_new_1f399782c3522210a969b1fdd40131fb	Variable	Accessories Details		INSERT_OR_UPDATE
item_option_new_42099bcc3122210a969b1fdd40131ac	Variable	Additional Accessories		INSERT_OR_UPDATE
item_option_new_a8e7d742c3522210a969b1fdd40131df	Variable	Laptop Model		INSERT_OR_UPDATE
item_option_new_aeb85b82c3522210a969b1fdd4013123	Variable	Justification		INSERT_OR_UPDATE
sc_cat_item_11d6930ec3122210a969b1fdd4013199	Catalog Item	Laptop Request		INSERT_OR_UPDATE
sc_cat_item_catalog_b187d02c3522210a969b1fdd40131fe	Catalog Items Catalog	Service Catalog.Laptop Request		INSERT_OR_UPDATE
sc_cat_item_category_75871342c3522210a969b1fdd4013103	Catalog Item Category	Hardware.Laptop Request		INSERT_OR_UPDATE
sys(ui_action_a61d9fc6c3522210a969b1fdd40131f1)	UI Action	Reset Form	Shopping Cart[sc_cart]	INSERT_OR_UPDATE

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 'laptoprequestproject'

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.

Retrieved Update Set - Laptop Request Project

Name: Laptop Request Project
Application: Global
Update source:
Parent:
State: Previewed
Loaded: 2025-06-24 07:39:12
Description:
Committed: 0
Inserted: 0
Updated: 10
Deleted: 0
Collisions: 0
Total: 10
Application name: Global

Update Delete Run Preview Again Commit Update Set

Related Links
Show All Preview Records

Customer Updates (10) Child Update Sets

Name Search Actions on selected rows...

Remote update set = Laptop Request Project

Name	Type	Target name	Table	View	Action
catalog_ui_policy_046ad06c3522210a969b1fd4013102	Catalog UI Policy	show accessories details			INSERT_OR_UPDATE
catalog_ui_action_f7bd46c3522210a969b1fd4013146	Catalog UI Policy Action	accessories.details			INSERT_OR_UPDATE
item_option_new_1f399782c3522210a969b1fd40131fb	Variable	Accessories Details			INSERT_OR_UPDATE
item_option_new_42099b0cc3122210a969b1fd40131ae	Variable	Additional Accessories			INSERT_OR_UPDATE
item_option_new_a8e7d742c3522210a969b1fd40131cf	Variable	Laptop Model			INSERT_OR_UPDATE
item_option_new_aeb85b82c3522210a969b1fd4013123	Variable	Justification			INSERT_OR_UPDATE
sc_cat_item_11d930ec3122210a969b1fd4013199	Catalog Item	Laptop Request			INSERT_OR_UPDATE
sc_cat_item_catalog_b187df02c3522210a969b1fd40131fe	Catalog Items Catalog	Service Catalog.Laptop Request			INSERT_OR_UPDATE
sc_cat_item_category_75871342c3522210a969b1fd4013103	Catalog Item Category	Hardware.Laptop Request			INSERT_OR_UPDATE
sys_ui_action_a61d9fc6c3522210a969b1fd40131f1	UI Action	Reset Form	Shopping Cart[sc_cart]		INSERT_OR_UPDATE

TestCatalogItem

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 field is visible and that should be mandatory

7. Now see the results, it fulfills our requirements.

Conclusion:

The LaptopRequest Catalog Item project successfully streamlines the process of requesting laptops within the organization by leveraging ServiceNow's ServiceCatalog 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.