

Date	02 November 2025
TeamID	NM2025TMID01453
ProjectName	LaptopRequestCatalogItemusingServiceNow

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.
- **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**
3. GitHub or other repository (optional) for maintaining documentation and exported update sets

RequirementsFunction

alRequirements

- The system must allow the creation of an update set to track changes made for the catalog item.
- Users should be able to create new catalog items specifically for laptop requests.
- The items 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-FunctionalRequirements

- The catalog item forms should load within 2 seconds.
- Request submissions should be processed without noticeable delay.
- The catalog item forms 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 forms 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).

- UseServiceNowcomponentslikeCatalogItem,UIPolicies,andUpdateSets.
- Validateandfinalizerequirementswithstakeholders.

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

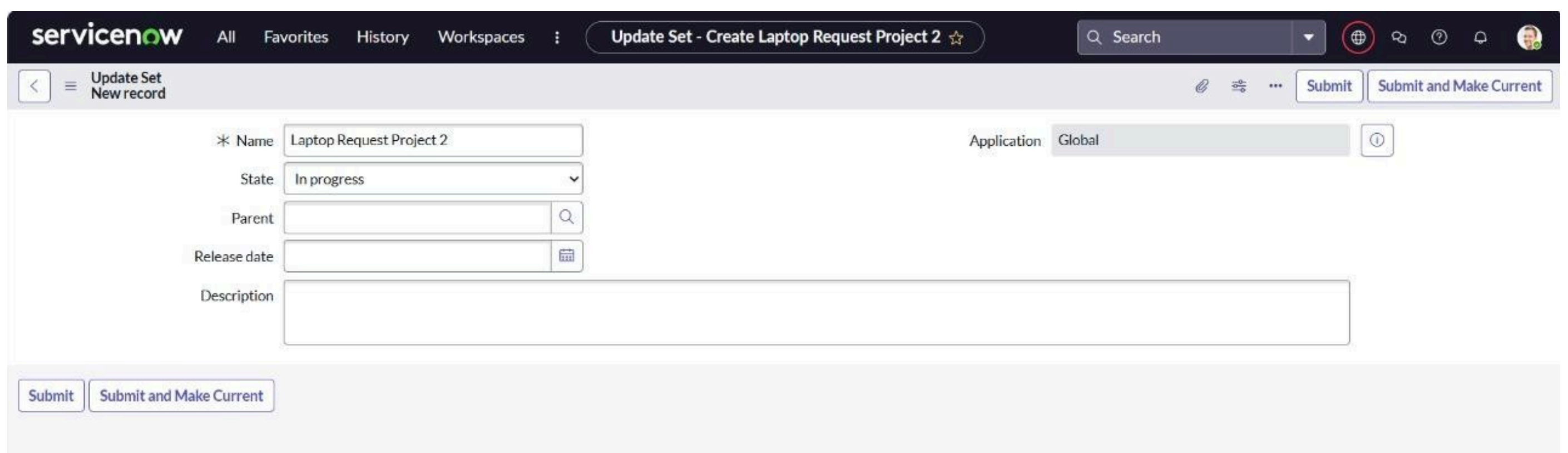
- Click New to open the update set form.
- Enter a meaningful name, e.g., "Laptop Request".

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 header bar includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces), and a search bar. The main form is titled 'Update Set - Create Laptop Request Project 2'. It contains several input fields: 'Name' (Laptop Request Project 2), 'State' (In progress), 'Parent' (with a search icon), 'Release date' (with a calendar icon), and 'Description' (a large text area). The 'Application' dropdown is set to 'Global'. At the bottom, there are two buttons: 'Submit' and 'Submit and Make Current'.

CreateServiceCatalogItem

1. Open servicenow.

2. Click on All >> service catalog

3. Select maintain items under catalog definitions

4. ClickonNew.

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
Request for Apple iPhone 13	true		Service Catalog	Mobiles	\$799.00	Item	2022-05-20 08:30:16
Request for Apple iPhone 13 pro	true		Service Catalog	Mobiles	\$999.00	Item	2022-05-24 03:02:19
For Apple iPhone 4/4S	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'

Catalog Item - Laptop Request

Application scope: Global
Update set: Laptop Request Project [Global]

Short description: Use this item to request a new laptop

Short description: Use this item to request a new laptop

Add variables

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

1. Variable1: Laptop Mode

Type: Single line text

Name:

laptop_modelOrder:10

0

- Clickonsubmit

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

servicenow All Favorites History Workspaces Admin Variable - New Record

Search

Variable - New Record

Submit

Application: Global

Type: Single Line Text

Catalog item: Laptop Request

Order: 100

Active: ☒

Mandatory: ☐

Read only: ☐

Hidden: ☐

Question Annotation Type Specifications Default Value Auto-populate Permission Availability

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: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:

- Afteraddingabovevariablewhichareaddedtonewlycreatedcatalogitem
- Thensavethecatalogitemform

servicenow All Favorites History Workspaces **Catalog Item - Laptop Request**

Q Search [X] [Add] [Refresh] [Help] [User]

< = Catalog Item Laptop Request [Copy] [Try It] [Update] [Edit in Catalog Builder] [Delete]

Meta [Text Area]

[Copy] [Try It] [Update] [Edit in Catalog Builder] [Delete]

Related Links
[Item Diagnostic](#)
[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 [Menu Icon] [Filter Icon] Order [Search Box] [Group Icon] [Minus Icon] Actions on selected rows... [New]

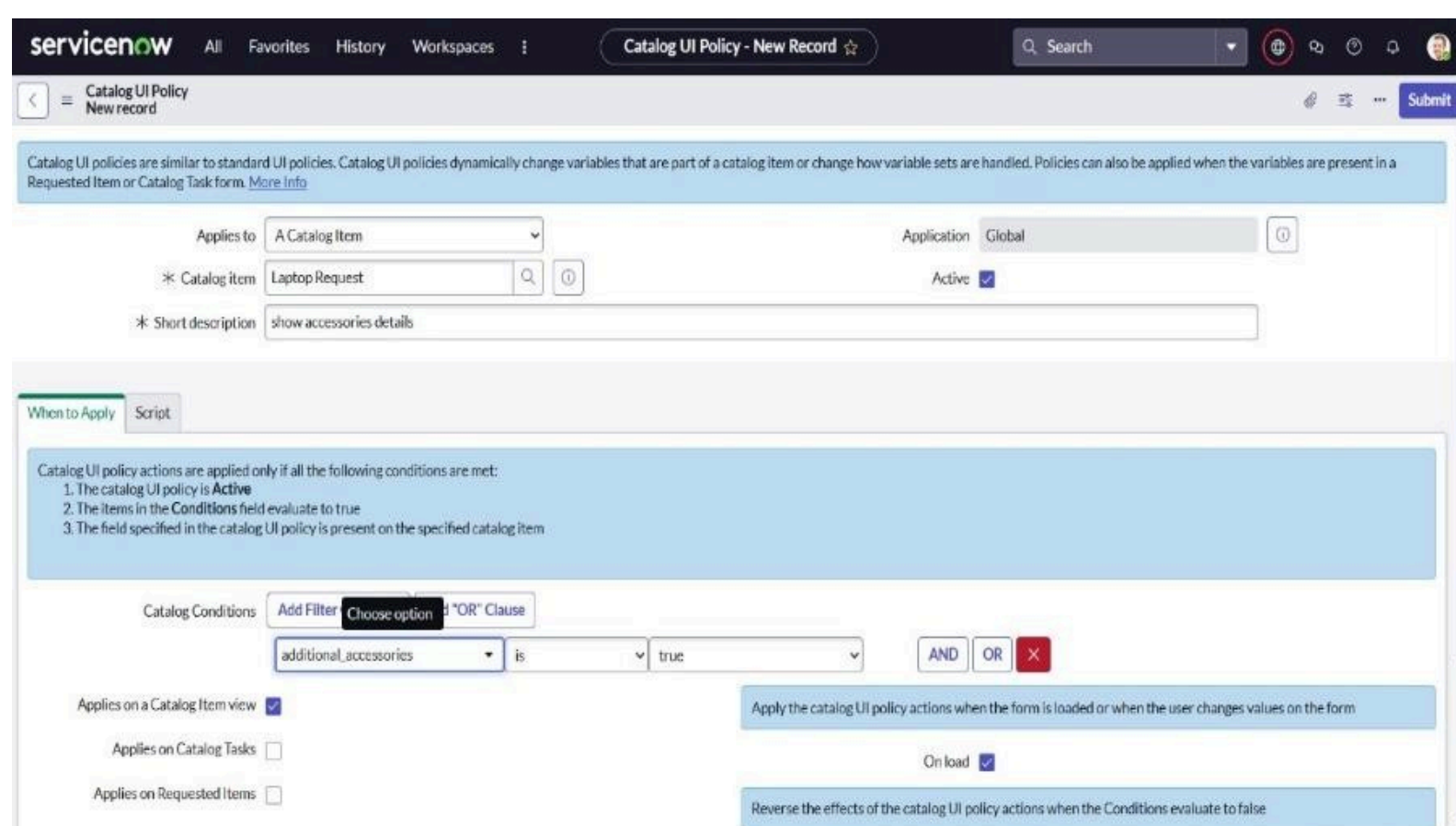
<input type="checkbox"/>	Q Type	Question	Order
<input type="checkbox"/>	Single Line Text	Laptop Model	100
<input type="checkbox"/>	Multi Line Text	Justification	200
<input type="checkbox"/>	CheckBox	Additional Accessories	300
<input type="checkbox"/>	Multi Line Text	Accessories Details	400

1 to 4 of 4

CreateCatalogUipolicies

1. Clickonall>>searchforservicecatalog
2. Selectmaintainitemundercatalogdefinition
3. Searchfor ‘laptoprequest’ whichiscreatedbefore
4. Select ‘laptoprequest’ andscrolldownclickon “CatalogUipolicies”
5. Inthecataloguipoliciesrelatedlisttabclickonnew
6. Giveshortdescriptionas:showaccessoriesdetails
7. SettheCatalogConditionintherelatedlisttab

‘whentoapply’ [field: additional_ accessories,
operator: is, value: true]



8. Clickonsave.(donotclickonsubmit)
9. Scrolldownandselect ‘cataloguiaction’
10. Thenclickonnewbutton
11. Selectvariablenameas:accessories_details

Order:100

Mandatory:Tru

e Visible : True

12. Clickonsaveandagainclicksavebuttonofthecataloguipolicyform.

servicenow

AllFavoritesHistoryWorkspaces

Catalog UI Policy Action - New Record

Search

<

=

Catalog UI Policy Action

New record

Submit

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

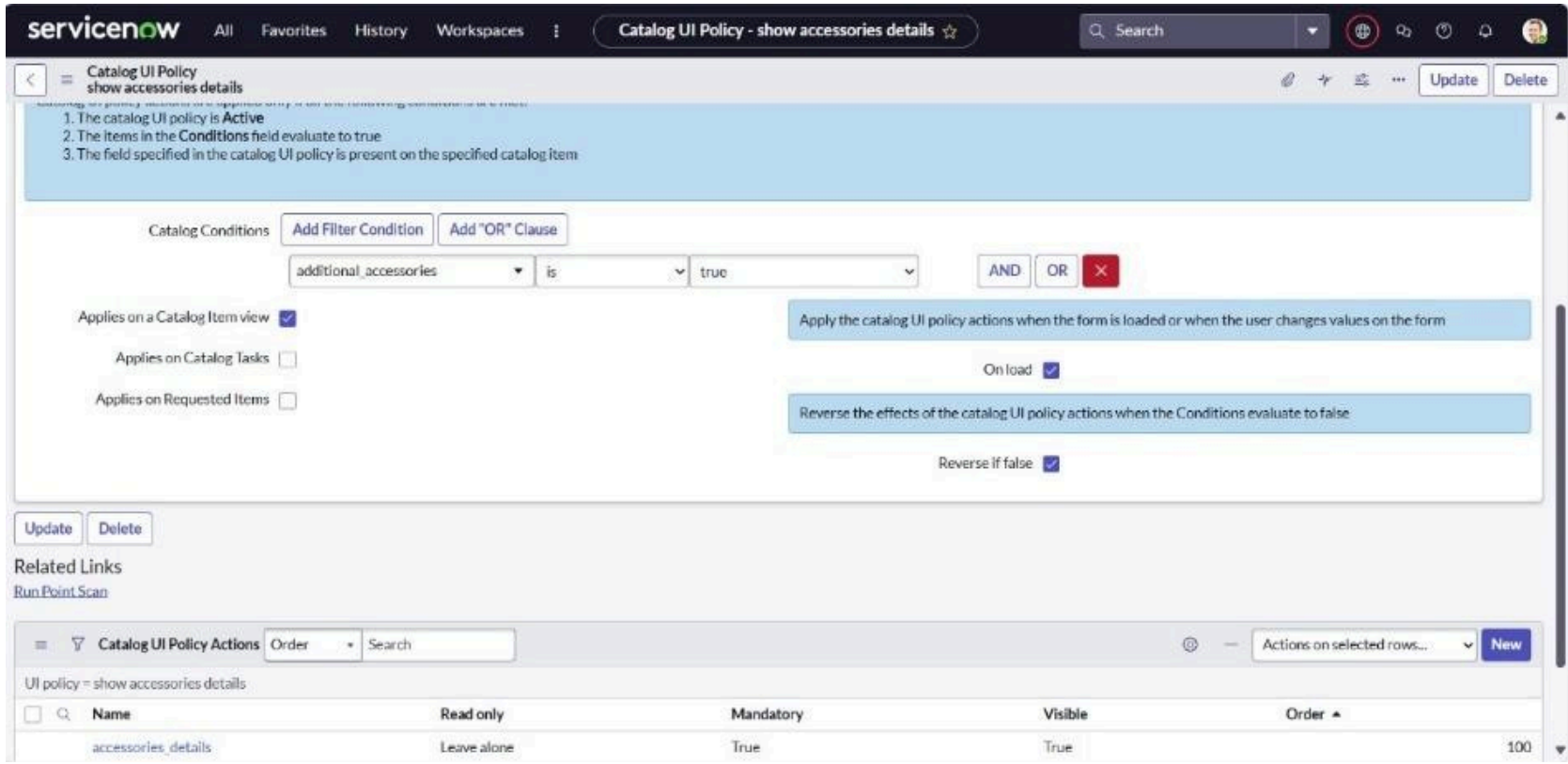
Value action

Leave alone

Field message type

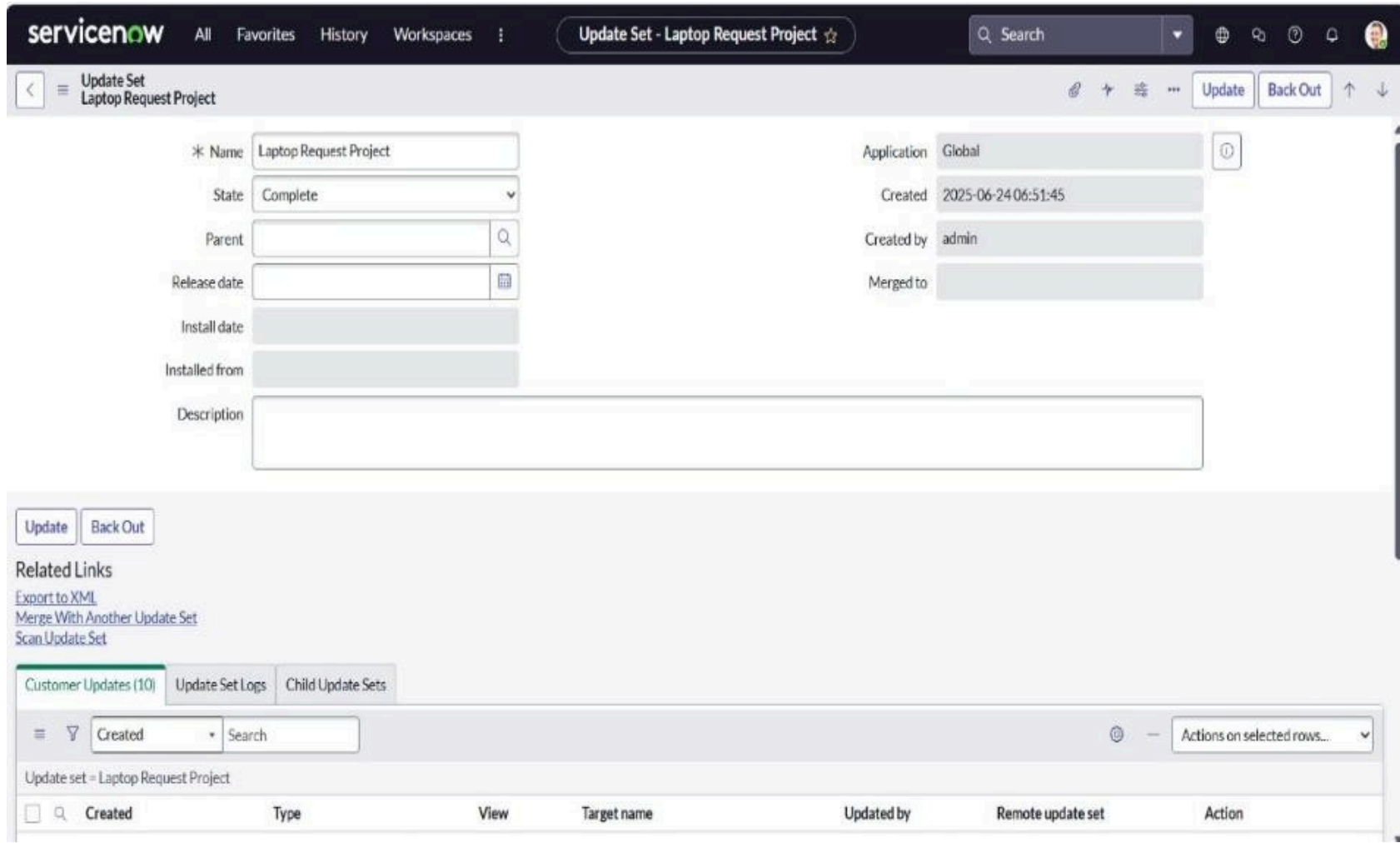
None

Submit



Exporting changes to another instance

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.

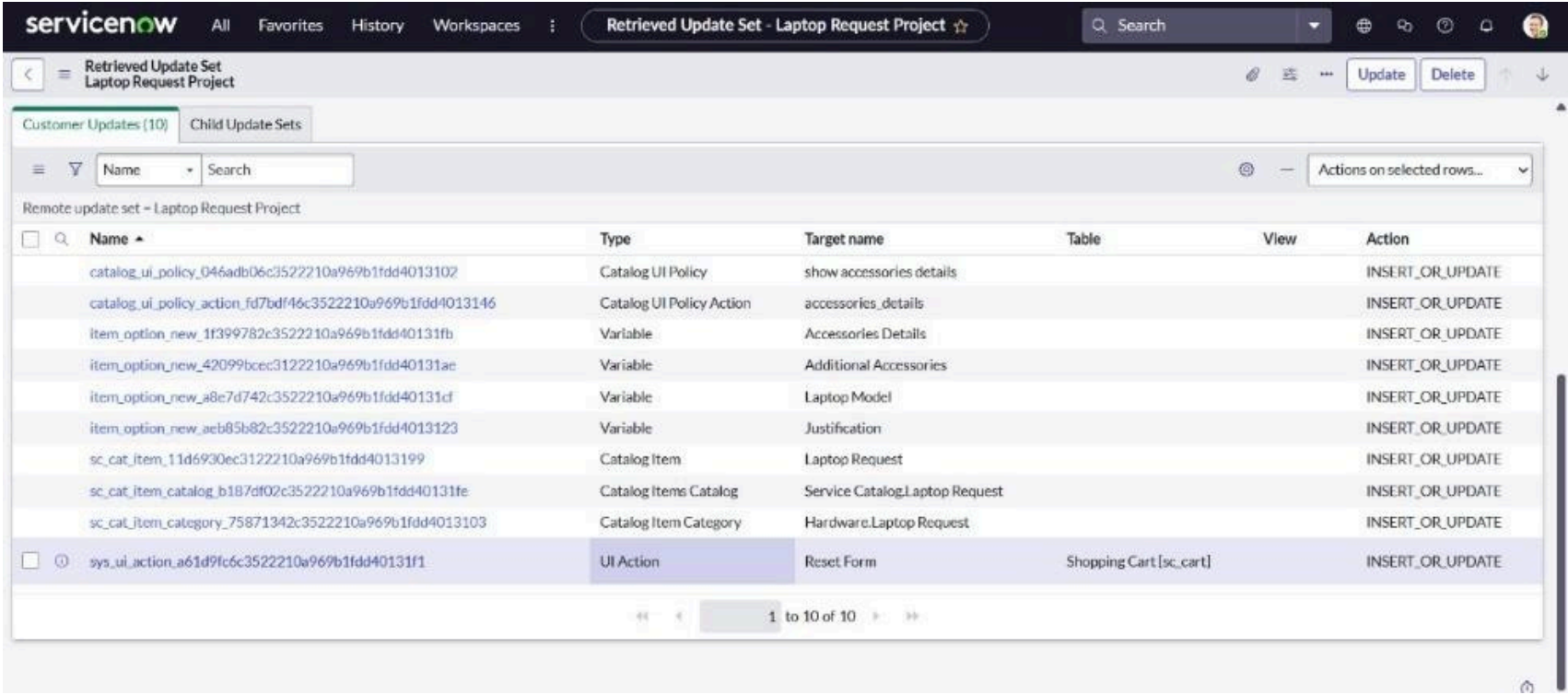


Click on export to XML, it download one file

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

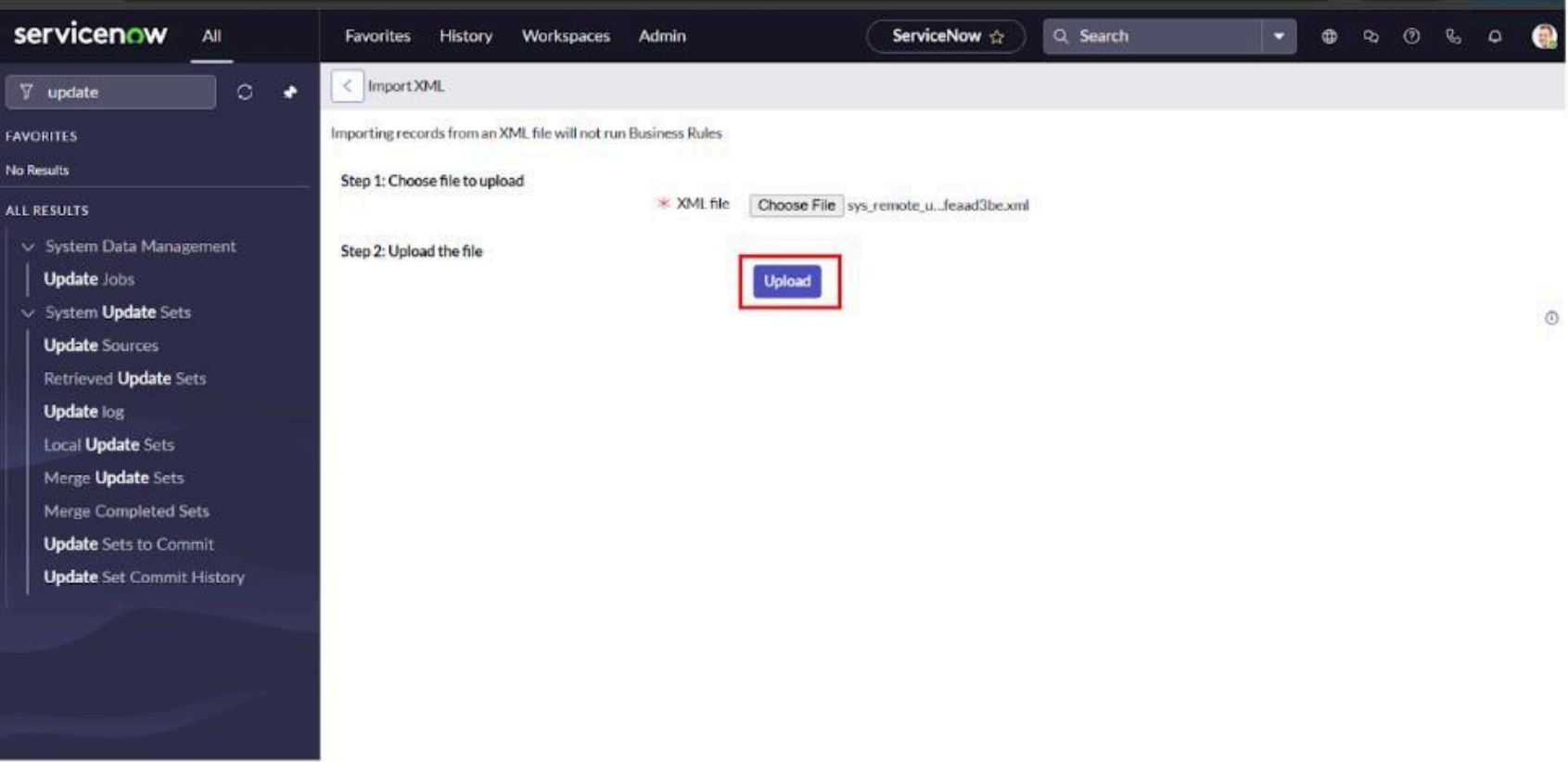
6.



Click on Import update set from XML

7. Upload the downloaded file in XML file

8. Click on Upload and it gets uploaded.



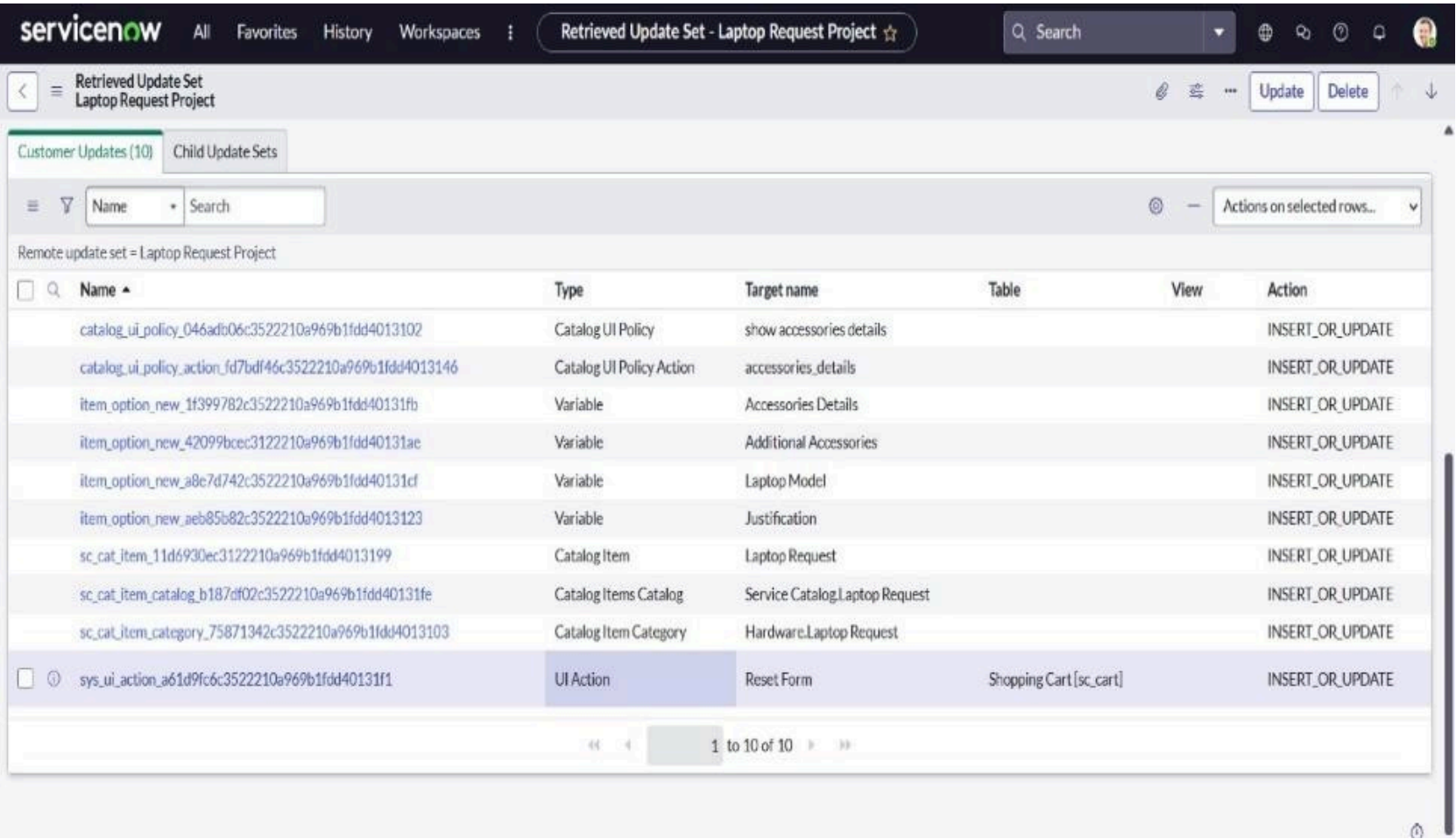
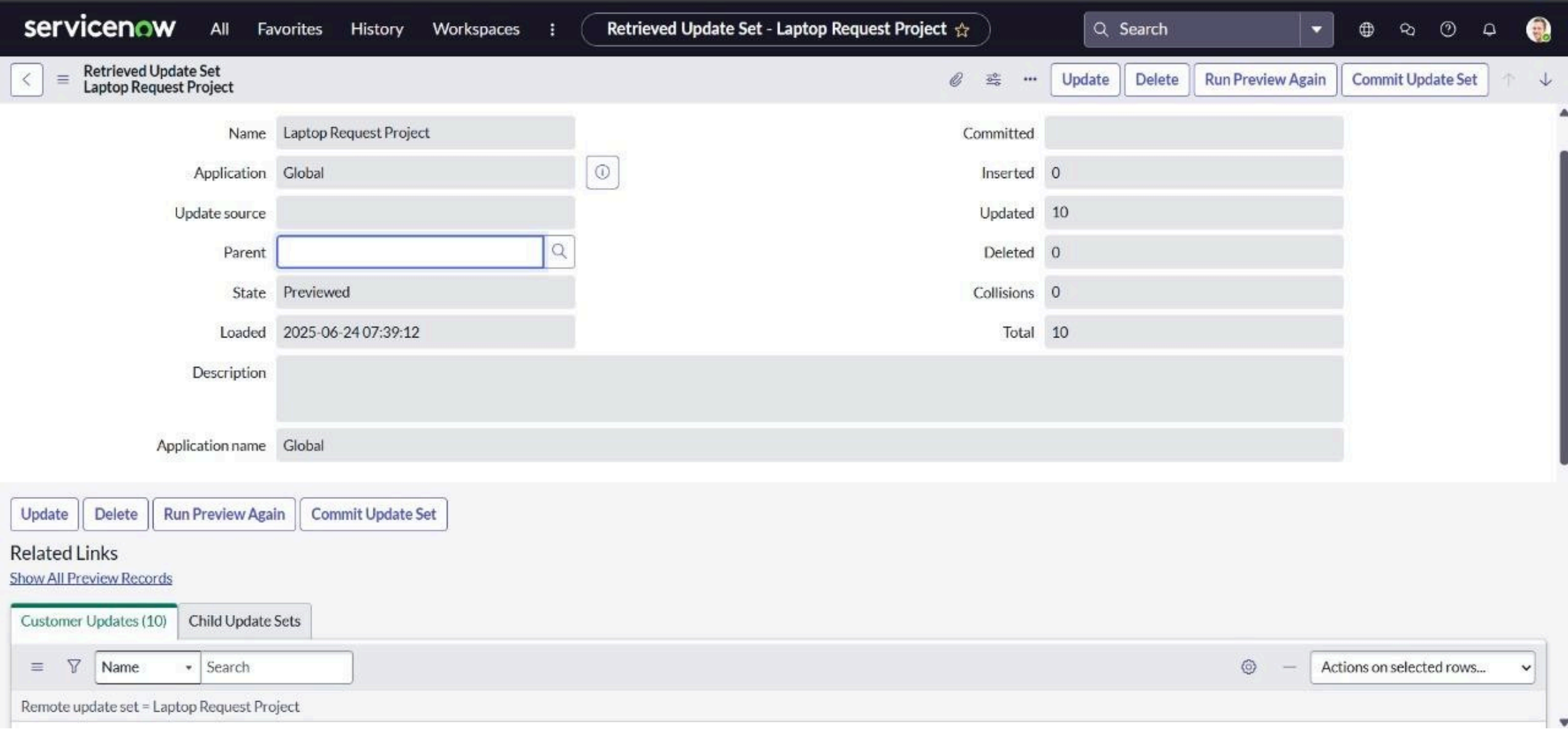
9. Open retrieved updateset 'laptoprequestproject'

10. Click on preview updateset

11. And click on commit updateset

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.



TestCatalogItem

1. Searchforservicecataloginapplicationnavigatorintargetinstance
2. Selectcatalog underservicecatalog
3. Selecthardwarecategoryand search for ‘laptoprequest’ item
4. Selectlaptoprequestitemandopenit
5. Itshowsthreevariablesonly.

6. Asperoursenario,whenweclickonadditionalaccessoriescheckboxthenaccessoriesdetailsfield is visible and that should be mandatory

7.Nowsee theresults,itfulfillsourrequirements.

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.