

Laptop Request Catalog Item

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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: To develop a digital Laptop Request Catalog system that simplifies laptop requests, ensures accurate data entry, and improves transparency in approvals.

Skills: UI Path RPA, Tanzu Application Service.

TASK INITIATION

Milestone 1: Update Set

Activity 1: Create Local Update set

1. Open service now.
2. Click on All >> search for update sets
3. Select local update sets under system update sets
4. Click on new
5. Fill the following details to create a update set as: “Laptop Request”
6. Click on submit and make current
7. By clicking on the button it activates the update set

The screenshot shows the ServiceNow interface for creating a new update set. The left sidebar displays the 'System Update Sets' menu, with 'Local Update Sets' highlighted. The main form is titled 'Update Set - Create Laptop Request Project 2' and contains the following fields:

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

At the bottom of the form, there are three buttons: 'Submit', 'Save', and 'Submit and Make Current'. The 'Submit and Make Current' button is highlighted with a red box.

NOTE: Perform all actions under this newly created update set only.

Milestone 2: Service Catalog Item

Activity 1: Create Service Catalog Item

1. Open service now.
2. Click on All >> service catalog
3. Select maintain items under catalog definitions
4. Click on New.

The screenshot shows the ServiceNow 'Catalog Items' page. The left sidebar contains a navigation menu with 'Catalog Definitions' and 'Maintain Items' highlighted. The main area displays a table of catalog items. The table has columns: Name, Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated. The table contains several rows of items, including '3M Privacy Filter - Lenovo X1 Carbon', '3M Privacy Filter - MacBook Pro', '401(k) Plan Enrollment', '401(k) Plan Enrollment Inquiry', '401(k) Retirement Plan Inquiry', 'Access', 'Acrobat', 'Add Beneficiaries', 'Add network switch to datacenter cabinet', and 'Add/Remove users from group'. A 'New' button is located in the top right corner of the table area.

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
401(k) Plan Enrollment	Enroll in or modify your 401(k) plan	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-08-18 10:52:30
401(k) Plan Enrollment Inquiry	Ask a question about your retirement pla...	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-05-20 17:59:55
401(k) Retirement Plan Inquiry	Ask a question about your existing plan	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-05-20 17:59:55
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 Beneficiaries	Add or modify your beneficiaries	true		Human Resources Catalog	Benefits	\$0.00	Item	2016-06-13 16:48:57
Add network switch to datacenter cabinet	This standard change template describes ...	true		Service Catalog	Network Standard Changes	\$0.00	Item	2024-10-21 07:20:03
Add/Remove users from group	Add/Remove users from group	true		Service Catalog	Services	\$0.00	Item	2022-12-05 10:17:33
Arlohub, Arlohub Dev	Create, edit or convert PDF	true		Service Catalog	Confidence	\$0.00	Item	2022-12-05

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'

The screenshot shows the ServiceNow 'Catalog Item - Laptop Request' form. The left sidebar contains navigation links for 'Service Catalog', 'Catalog Definitions', and 'Maintain Items'. The main form area includes fields for 'Name' (Laptop Request), 'Catalog' (Service Catalog), 'Category' (Hardware), 'Application' (Global), 'Active' (checked), 'Fulfillment automation level' (Unspecified), 'State' (None), 'Checked out' (None), and 'Owner' (System Administrator). Below these fields 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.

Activity 2: 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

The screenshot shows the ServiceNow 'Variable - New Record' form. The form is for creating a new variable. The 'Application' is set to 'Global'. The 'Type' is set to 'Single Line Text'. The 'Catalog Item' is set to 'Laptop Request'. The 'Order' is set to '100'. The 'Active' checkbox is checked. The 'Mandatory', 'Read only', and 'Hidden' checkboxes are unchecked. The 'Question' tab is selected, showing a question definition for 'Laptop Model' with the name 'laptop_model'. The 'Submit' and 'Save' buttons are at the bottom.

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

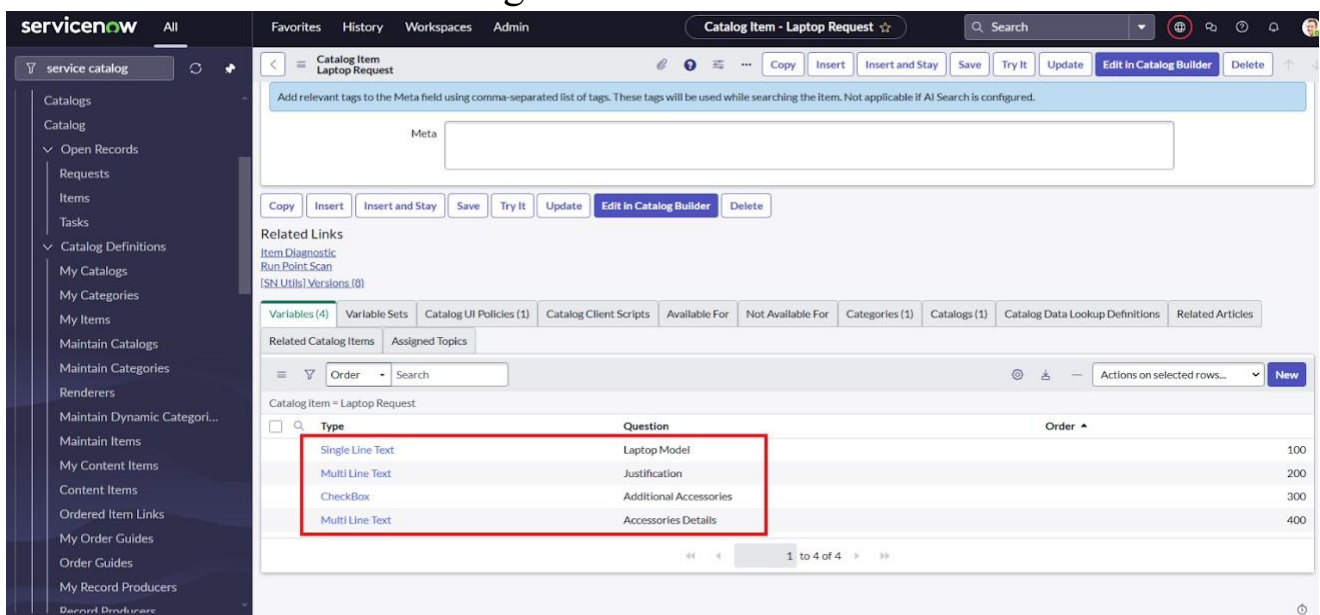
Type: Multi line text

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

Activity 1: 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]

The screenshot shows the ServiceNow interface for configuring a Catalog UI Policy. The left sidebar shows the navigation menu with 'Service Catalog' > 'Catalog Definitions' > 'Maintain Items' selected. The main area is titled 'Catalog UI Policy - Show Accessories Details'. It includes fields for 'Applies to' (A Catalog Item), 'Catalog item' (Laptop Request), 'Short description' (Show Accessories Details), and 'Application' (Global). The 'When to Apply' tab is active, showing 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'. Below this, the 'Catalog Conditions' section shows a filter for 'additional_accessories' with the operator 'is' and value 'true'. There are also checkboxes for 'Applies on a Catalog Item view' (checked), 'Applies on Catalog Tasks' (unchecked), and 'Applies on Requested Items' (unchecked). At the bottom, there are checkboxes for 'On load' (checked) and 'Reverse if false' (checked).

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 ServiceNow interface for configuring a Catalog UI Policy Action. The left sidebar contains navigation links for 'service catalog', 'Request Overview', 'Catalogs', 'Open Records', 'Requests', 'Items', 'Tasks', 'Catalog Definitions', 'My Catalogs', 'My Categories', 'My Items', 'Maintain Catalogs', 'Maintain Categories', 'Renderers', 'Maintain Dynamic Categories', 'Maintain Items', and 'My Content Items'. The main content area is titled 'Catalog UI Policy Action - accessories_details'. It includes a search bar, a 'Catalog Item' dropdown set to 'Laptop Request', a 'Variable name' dropdown set to 'accessories_details', and an 'Order' field set to '100'. To the right, there are several configuration options: 'Application' (Global), 'Mandatory' (True), 'Visible' (True), 'Read only' (Leave alone), 'Value action' (Leave alone), and 'Field message type' (None). At the bottom, there are buttons for 'Insert', 'Insert and Stay', 'Save', 'Update', and 'Delete'. The 'Save' button is highlighted with a red box. Below the buttons, there is a 'Related Links' section with links to 'Run Point Scan' and '(SN Utils) Versions (1)'. The top navigation bar includes 'Favorites', 'History', 'Workspaces', 'Admin', and a search bar.

servicenow

All

Request Overview

Catalogs

Catalog

Open Records

Requests

Items

Tasks

Catalog Definitions

My Catalogs

My Categories

My Items

Maintain Catalogs

Maintain Categories

Renderers

Maintain Dynamic Catego...

Maintain Items

My Content Items

Content Items

Ordered Item Links

My Order Guides

Order Guides

My Record Producers

Record Producers

Composite Record Produc...

User Criteria

Maintain Cart Layouts

Catalog Administration

Service Catalog Overview

Service Fulfillment Steps R...

Service Fulfillment Steps C...

Service Catalog Administration

Catalog UI Policy

Show Accessories Details

UI policy - Show Accessories Details

More Info

Applies to

A Catalog Item

Application

Global

* Catalog item

Laptop Request

Active

* Short description

Show Accessories Details

When to Apply

Script

Catalog UI policy actions are applied only if all the following conditions are met:
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

Catalog Conditions

Add Filter Condition

Add "OR" Clause

additional_accessories

is

true

AND

OR

Applies on a Catalog item view

Applies on Catalog Tasks

Applies on Requested Items

Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form

On load

Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false

Reverse if false

Insert

Insert and Stay

Save

Update

Delete

Related Links

Run Point Scan

[SN.Untib] Versions [1]

Catalog UI Policy Actions

Order

Search

Actions on selected rows...

New

UI policy - Show Accessories Details

Name	Read only	Mandatory	Visible	Order
accessories_details	Leave alone	True	True	100

1 to 1 of 1

Milestone

Activity 1:

4: Ui action

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.");
}
```

Click on save

Milestone

Activity 1:

The screenshot shows the ServiceNow 'UI Action - Reset Form' configuration page. The left sidebar contains a navigation menu with 'UI Action' selected. The main content area is divided into two columns. The left column contains fields for 'Name' (Reset Form), 'Table' (Shopping Cart [sc_cart]), 'Order' (100), and 'Action name' (Reset Form). Below these are checkboxes for 'Active', 'Show insert', 'Show update', 'Client' (checked), 'List v2 Compatible', and 'List v3 Compatible'. The right column contains a search bar and buttons for 'Insert', 'Insert and Stay', 'Save', 'Update', and 'Delete'. The 'Save' button is highlighted with a red box. Below the main configuration area are sections for 'Overrides', 'Messages', 'Comments', 'Hint', 'OnClick', and 'Condition'.

5: Export Update Set

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

Milestone

Activity 1:

Update Set - Laptop Request Project

Name: Laptop Request Project

State: Complete

Application: Global

Created: 2025-01-26 22:20:46

Created by: admin

Merged to:

Parent:

Release date:

Install date:

Installed from:

Description:

Update Back Out Insert Insert and Stay Save

Related Links

[Export to XML](#)

[Merge your update set](#)

[Scan Update Set](#)

[\[SN Utils\] Versions \(0\)](#)

Customer Updates (11) Update Set Logs Child Update Sets

Created	Type	View	Target name	Updated by	Remote update set	Action
2025-01-26 22:40:32	Catalog UI Policy		Show Accessories Details	admin	(empty)	INSERT_OR_UPDATE
2025-01-26 22:43:26	Catalog UI Policy Action		accessories_details	admin	(empty)	INSERT_OR_UPDATE

6: Login To Another Instance

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

Milestone

Activity 1:

6. Click on Import update set from XML

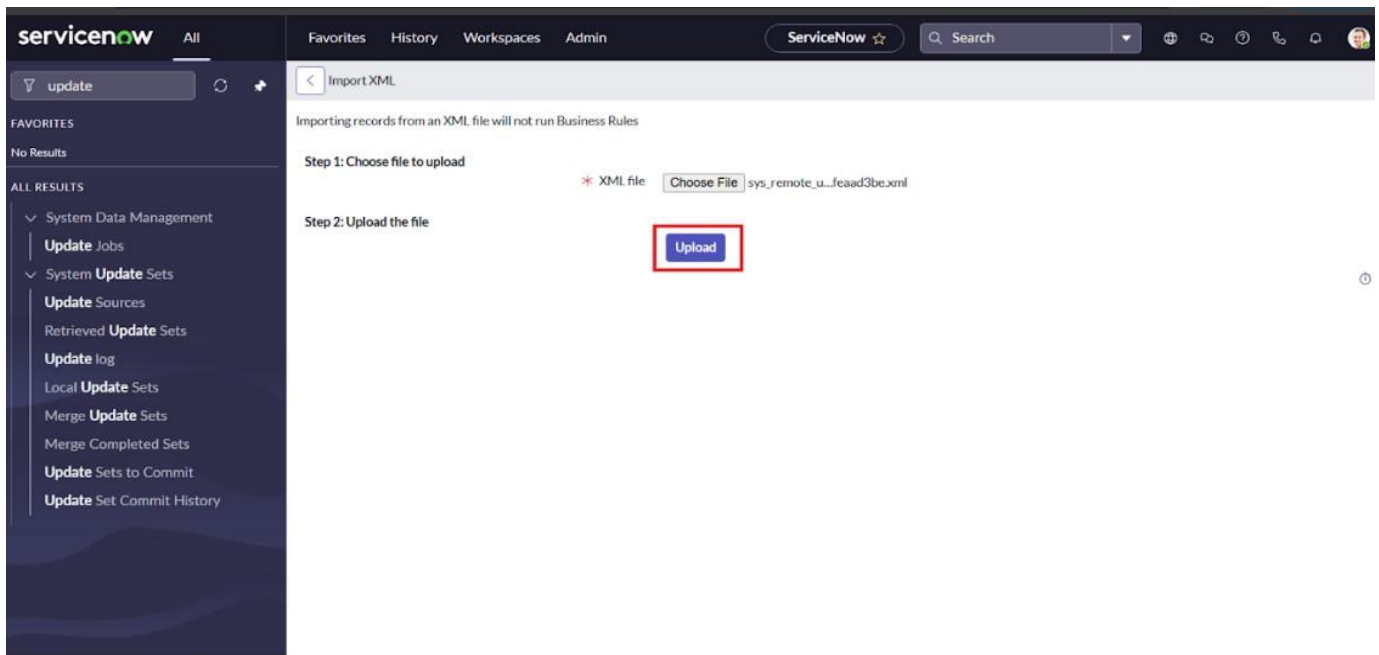
The screenshot shows the ServiceNow interface for 'Retrieved Update Sets'. The left sidebar contains a navigation menu with the following items: 'update', 'System Data Management', 'Update Jobs', 'System Update Sets', 'Update Sources' (highlighted with a red box), 'Update log', 'Local Update Sets', 'Merge Update Sets', 'Merge Completed Sets', 'Update Sets to Commit', and 'Update Set Commit History'. The main content area displays a table of update sets. The table has the following columns: Name, Application, State, Update source, Description, Loaded, Committed, Parent, and Remote Batch Base. The table contains several rows, including 'first update set', 'first update set 2', 'Migration of 'AI Search Profile', 'AI Se...', 'program', 'project', 'Rathan's Snow', 'second', 'sunny', and 'sunny gujja'. A red box highlights the 'Import Update Set from XML' link in the 'Related Links' section at the bottom of the page.

Name	Application	State	Update source	Description	Loaded	Committed	Parent	Remote Batch Base
first update set	Global	Previewed	sandeep		03:00:03	(empty)	(empty)	(empty)
first update set 2	Global	Previewed	sandeep		2024-08-30 03:00:07	(empty)	(empty)	(empty)
Migration of 'AI Search Profile', 'AI Se...	Advanced AI Search Management Tools	Loaded	(empty)	Automatically created by the migration s...	2023-06-30 15:09:18	(empty)	(empty)	(empty)
program	Global	Previewed	sandeep		2024-08-30 03:00:03	(empty)	(empty)	(empty)
project	Global	Committed	sandeep		2024-08-30 03:00:05	2024-08-30 03:01:03	(empty)	(empty)
Rathan's Snow	Global	Loaded	(empty)	Testing purpose	2024-07-10 23:32:45	(empty)	(empty)	(empty)
second	Global	Previewed	sandeep		2024-08-30 03:00:01	(empty)	(empty)	(empty)
sunny	Global	Previewed	sandeep		2024-08-30 03:00:02	(empty)	(empty)	(empty)
sunny gujja	Global	Previewed	sandeep		2024-08-30 03:00:00	(empty)	(empty)	(empty)

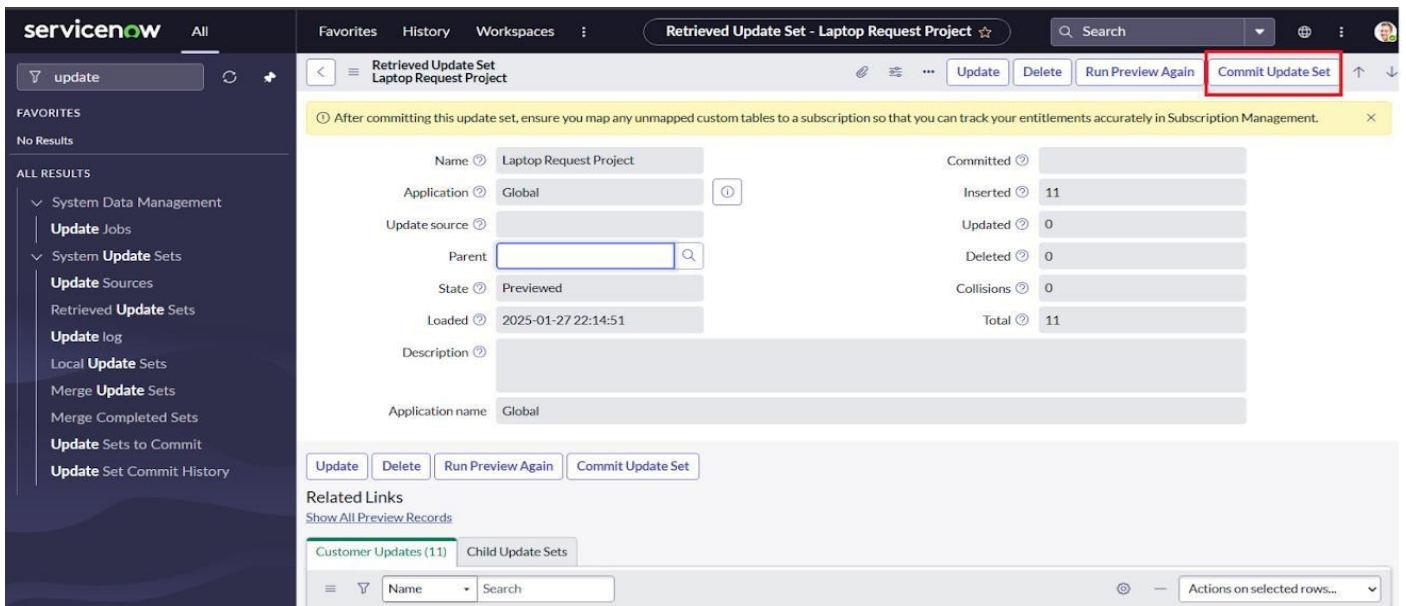
Related Links
[Import Update Set from XML](#)

7. Upload the downloaded file in XML file

8. Click on Upload and it gets uploaded.



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: Testing

Activity 1: 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

ServiceCatalog > Hardware > Laptop Request

Use this item to request a new laptop

Laptop Model

Justification

☐ Additional Accessories

Order this Item

Quantity 1

Delivery time 2 Days

Order Now

Add to Cart

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.

ServiceCatalog > Hardware > Laptop Request

Use this item to request a new laptop

Laptop Model

hp

Justification

☒ Additional Accessories

* Accessories Details

Order this Item

Quantity 1

Delivery time 2 Days

Order Now

Add to Cart

Shopping Cart

Empty

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.