Laptop Request Catalog Item

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Team Members: 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:

- Create a catalog item for laptop requests.
- Add fields for laptop model, justification, accessories, and accessories details.
- Make accessories details visible and mandatory only if the user selects "Additional Accessories".
- Add a reset button to clear the shopping cart form.
- Export and import changes using an update set and test everything on another instance.

Skills:

- ServiceNow Administration
- Service Catalog Management
- Form Design with Variables
- UI Policy & Client-Side Logic
- UI Actions (Scripting)
- Update Set Management
- Testing & Validation
- Problem-Solving
- Documentation Skills
- Team Collaboration

TASK INITIATION
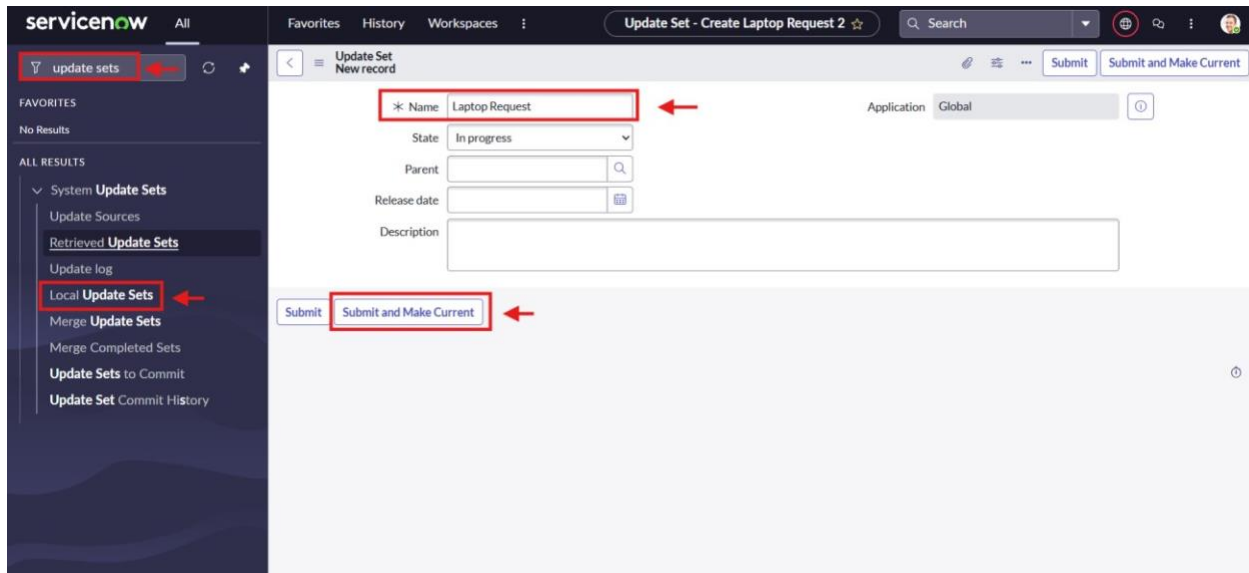
Milestone 1 : Setting Up ServiceNow Instance

Activity 1: Create Instance

1. Go to developer.servicenow.com.
2. Sign up for a free developer account.
3. After logging in, click **Personal Developer Instance**.
4. Click **Request Instance** to create your own ServiceNow space.
5. Fill in the form and submit it.
6. You will get an email with your instance link, username, and password.
7. Log in with those details.
8. Now your ServiceNow instance is ready to use.

Milestone 2 : Update Set

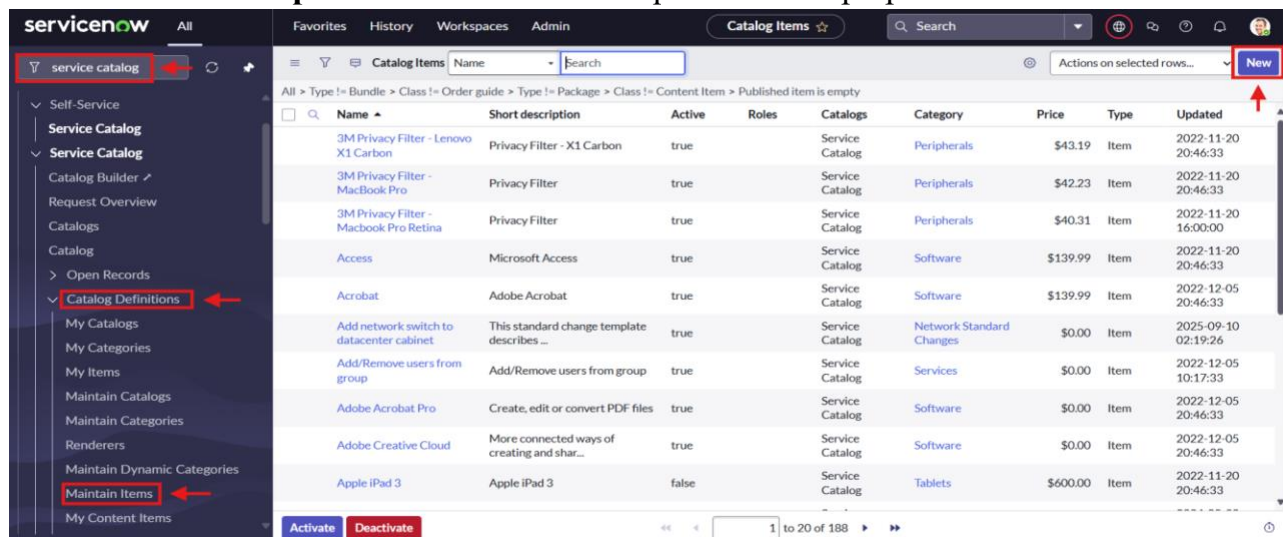### Activity 1: Create Local Update Set (Name: "Laptop Request")

- Open ServiceNow → click **All** → search **Update Sets**.
- Choose **Local Update Sets** (under System Update Sets).
- Click **New**. Enter **Name:** Laptop Request.
- Click **Submit** and then **Make Current** (this activates the update set so changes are saved into it).
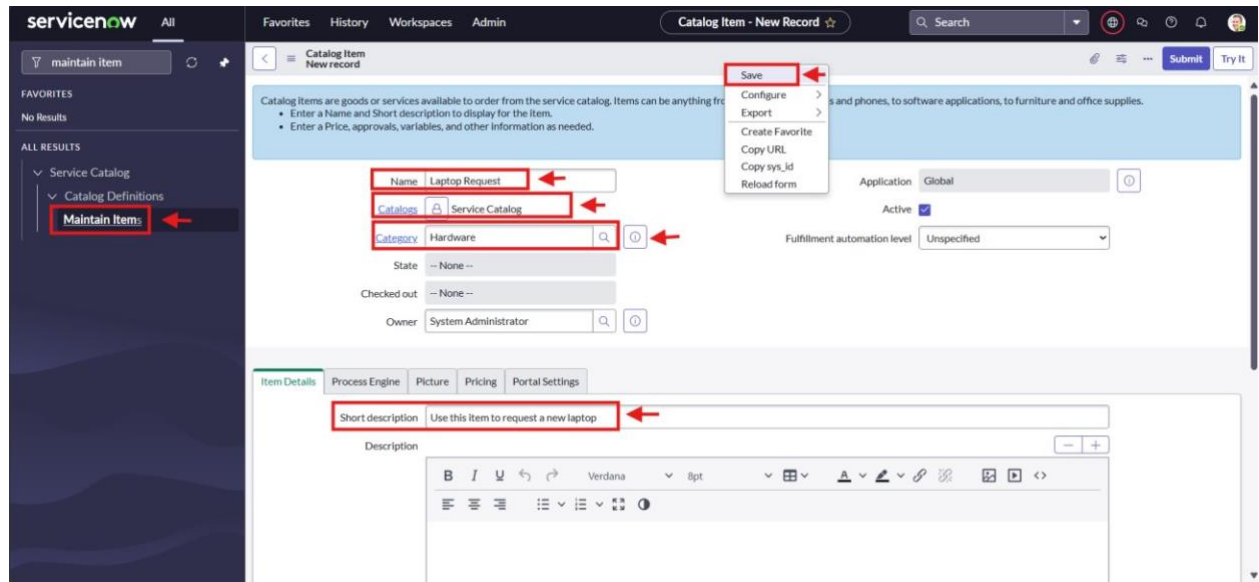
Milestone 3 : Service Catalog Item

Activity 1: Create Catalog Item

1. Open ServiceNow → **All** → search **Service Catalog**.
2. Under *Catalog Definitions* select **Maintain Items**.
3. Click **New** and fill:
   - **Name:** Laptop Request
   - **Catalog:** Service Catalog
   - **Category:** Hardware
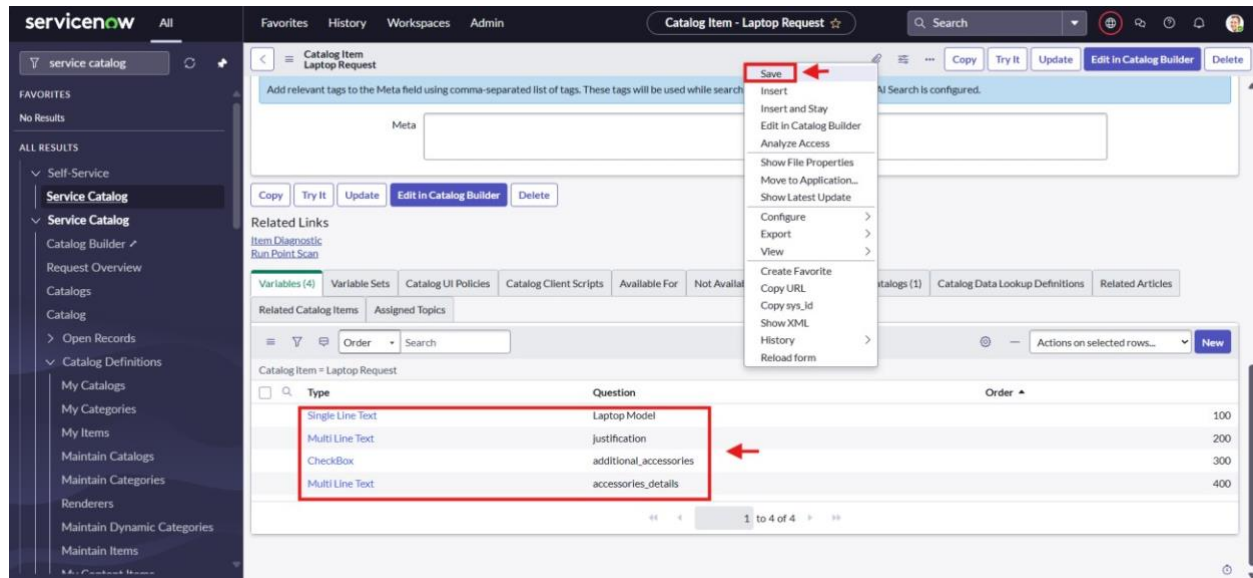4. **Short description:** Use this item to request a new laptop 5. Click **Save**.

Activity 2: Add Variables (form fields)

After saving the catalog item, scroll to the **Variables** related list and add these variables one-by one (click **New** each time):

1. **Laptop Model** ○ Type: Single line text ○ Name: laptop_model ○ Order: 100
2. **Justification** ○ Type: Multi-line text ○ Name: justification ○ Order: 200
3. **Additional Accessories** ○ Type: Checkbox ○ Name: additional_accessories ○ Order: 300
4. **Accessories Details** ○ Type: Multi-line text ○ Name: accessories_details ○ Order: 400

Save the catalog item after adding all variables.
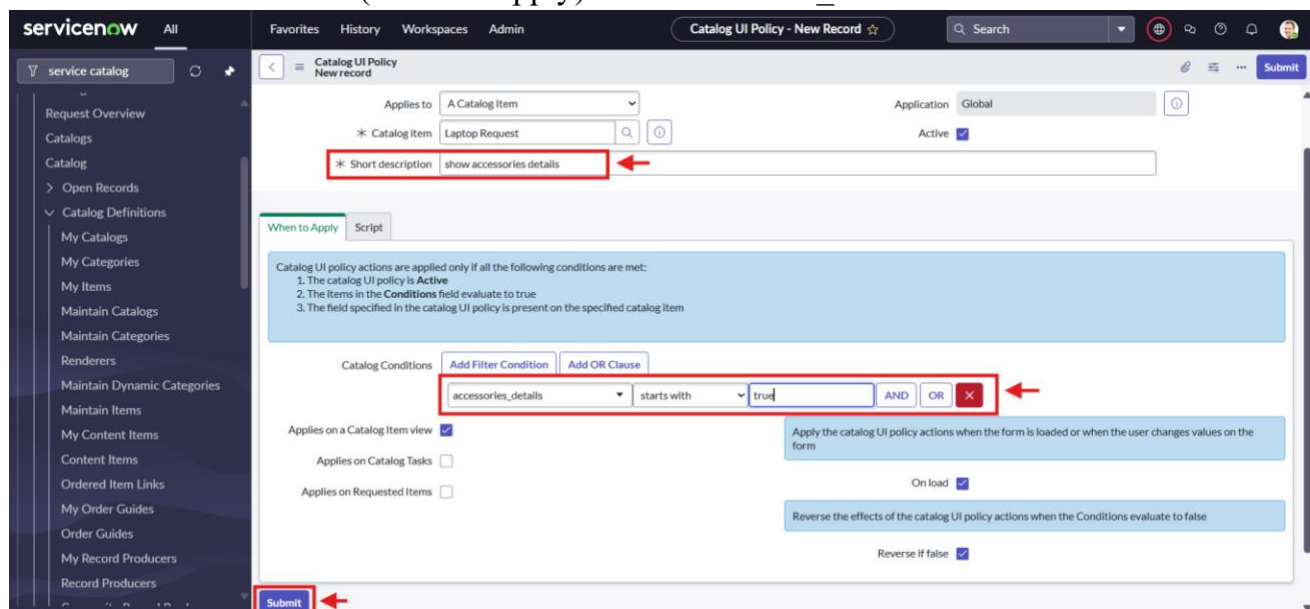
Milestone 4 : UI Policy

Activity 1: Create Catalog UI Policy and Action

Purpose: Show accessories_details and make it mandatory **only** when additional_accessories is checked.

1. Go to **All → Service Catalog → Maintain Items →** open **Laptop Request**.
2. Scroll down to **Catalog UI Policies** (related list) → click **New**.
   - Short description: Show accessories details
   - Condition (When to apply): **field** additional_accessories **is** true

3. Click **Save** (do **not** click Submit).
4. In the same UI Policy form, open **Catalog UI Actions** → click **New** and set:
    - Variable name: accessories_details
    - Order: 100
    - Mandatory: **True**
    - Visible: **True**
5. Click **Save** for the UI Action, then save the UI Policy form again.

Result: When user checks **Additional Accessories**, the **Accessories Details** field will appear and become required.
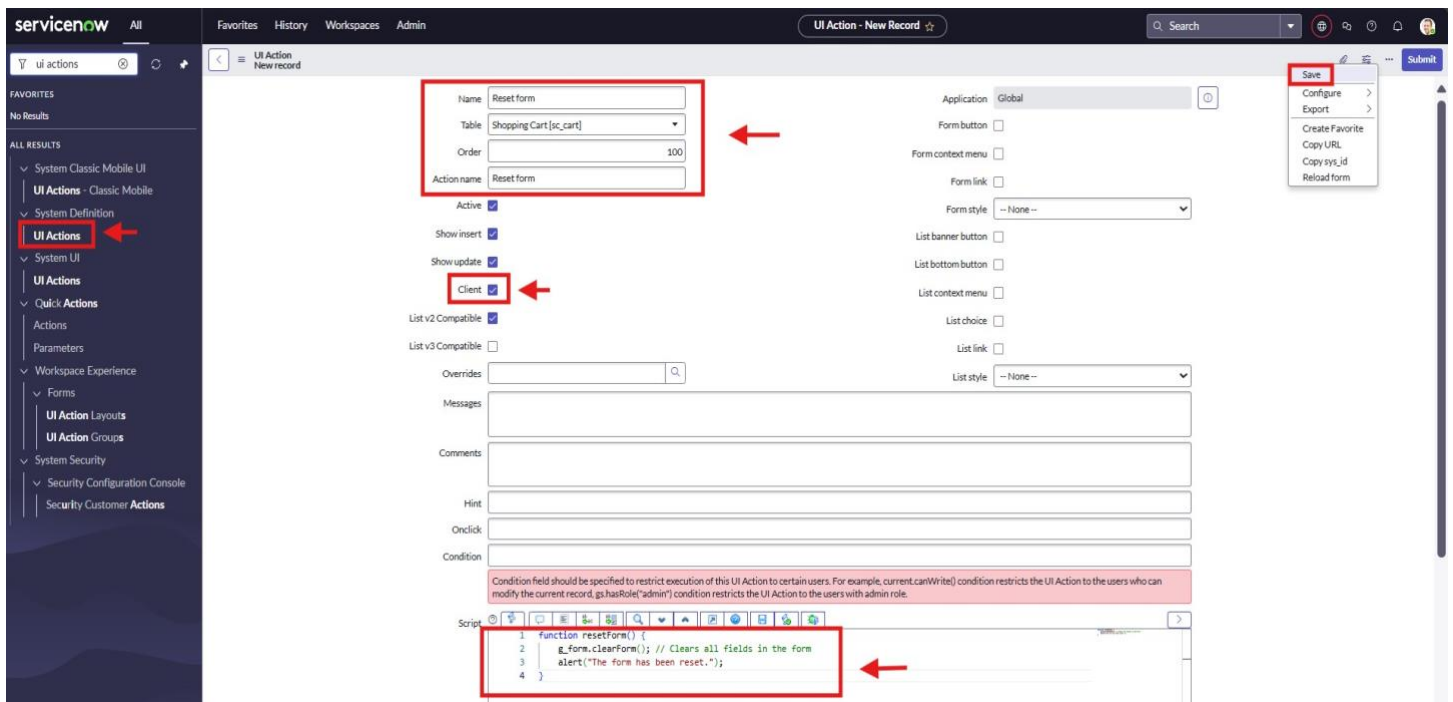
Milestone 5 : UI Action (Reset Form)

Activity 1: Create a UI Action for shopping cart

1. Open **All** → search **UI Actions** (under System Definition).
2. Click **New** and fill:
   - **Table:** shopping_cart (sc_cart)
   - **Order:** 100
   - **Action name:** Reset form
   - **Client:** checked (so it runs in browser)
3. Add this script (client-side) in the Script field: function resetForm() {
   g_form.clearForm(); // clears all
   fields   alert("The form has been reset.");
   }
4. Click **Save**.
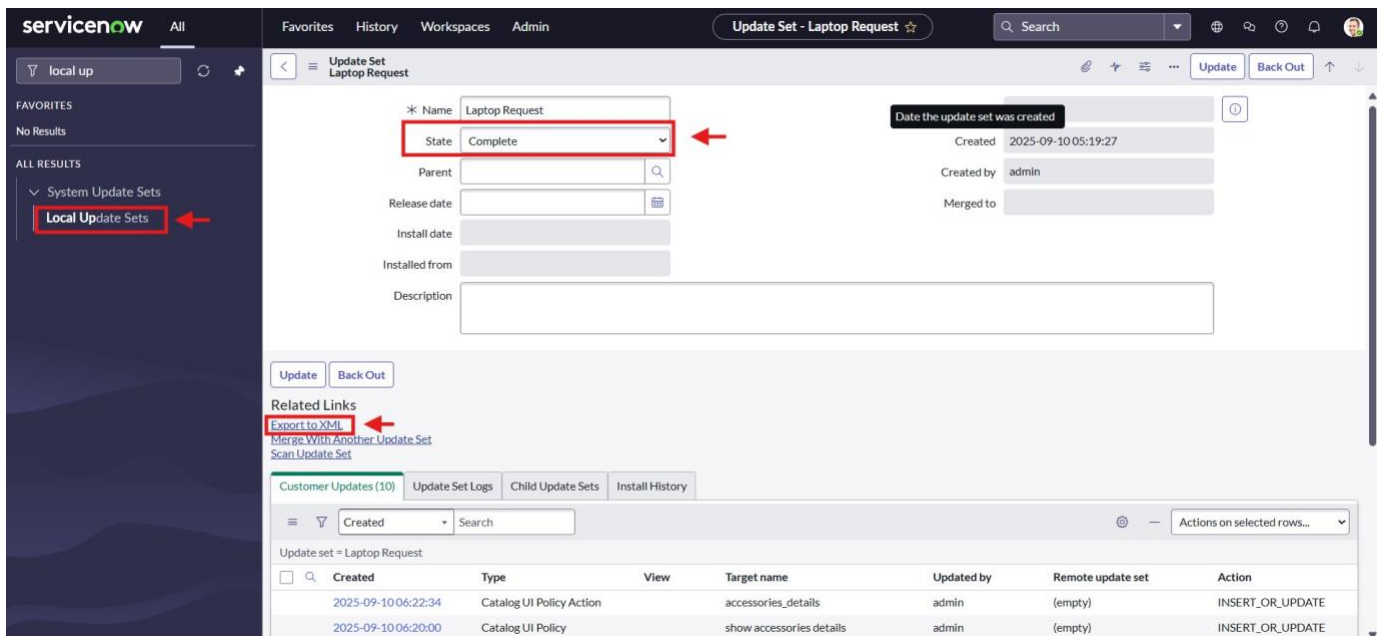
Milestone 6 : Export Update Set

Activity 1: Export changes to XML

1. Go **All** → search **Update Sets** → open **Local Update Sets**.
2. Select your update set (Laptop Request or Laptop Request Project) and set **State** to **Complete**.
3. In the related **Updates** tab confirm all changes are present.
4. Click **Export to XML** — this downloads an XML file containing your update set
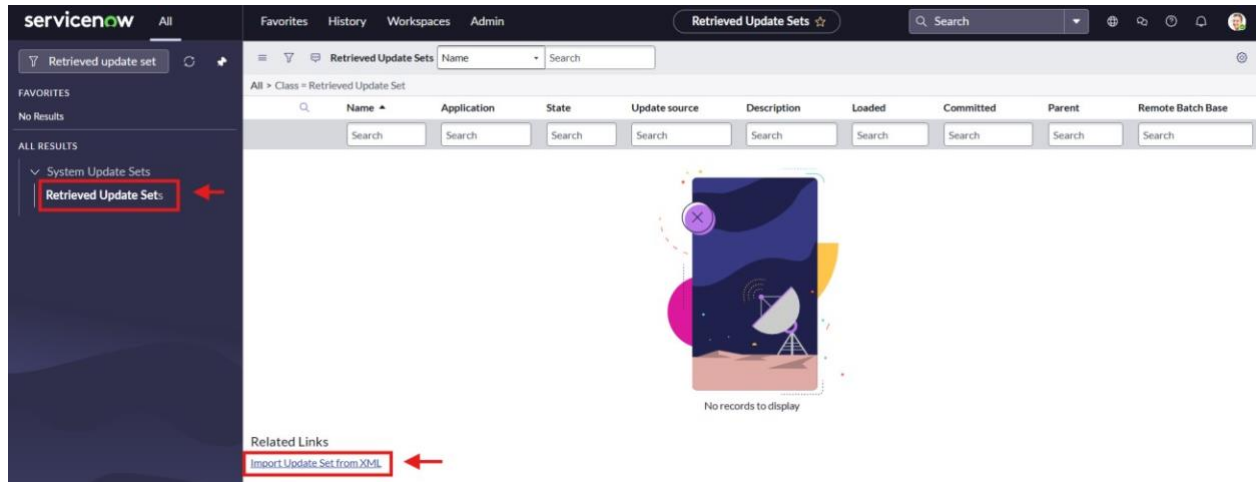

Milestone 7 : Login to Another Instance (Import Update Set)

## Activity 1: Retrieve and commit update set on target instance

1. Open target instance (use incognito if needed) and log in.
2. Go **All** → search **Retrieved Update Sets** (under System Update Sets).
3. Click **Import Update Set from XML** and upload the XML file exported earlier.

4. After upload, open the retrieved update set (e.g., Laptop Request Project) → click **Preview Update Set** → then **Commit Update Set**.
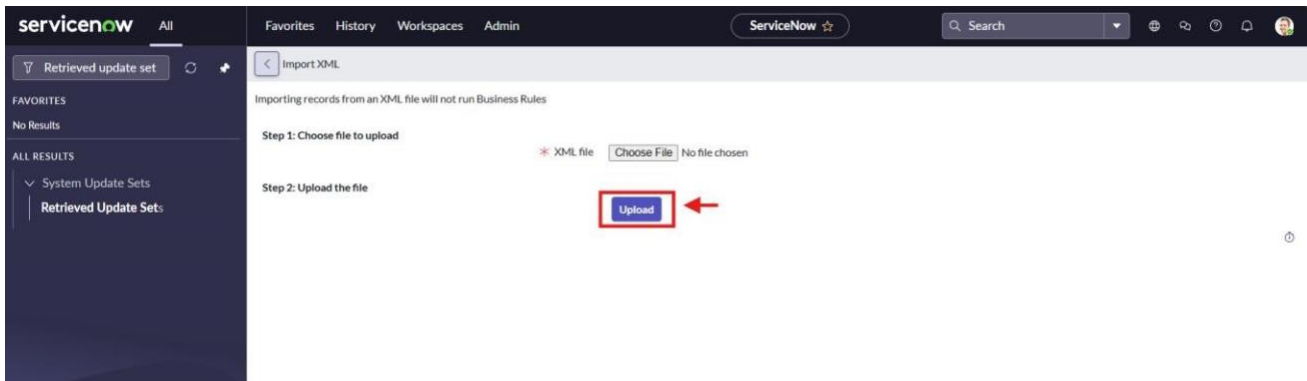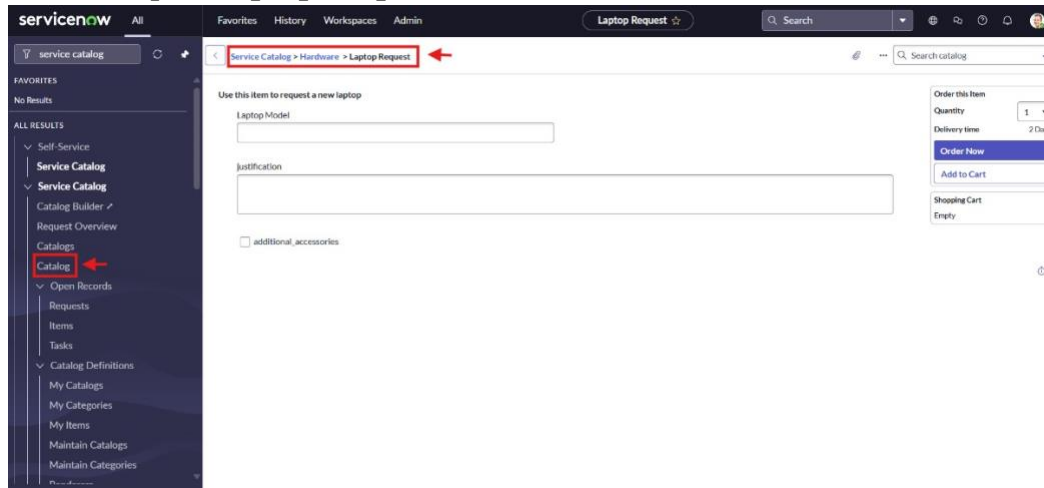

5. Verify the related **Updates** tab shows all changes — now the target instance has the catalog item, UI Policy, UI Action, etc.
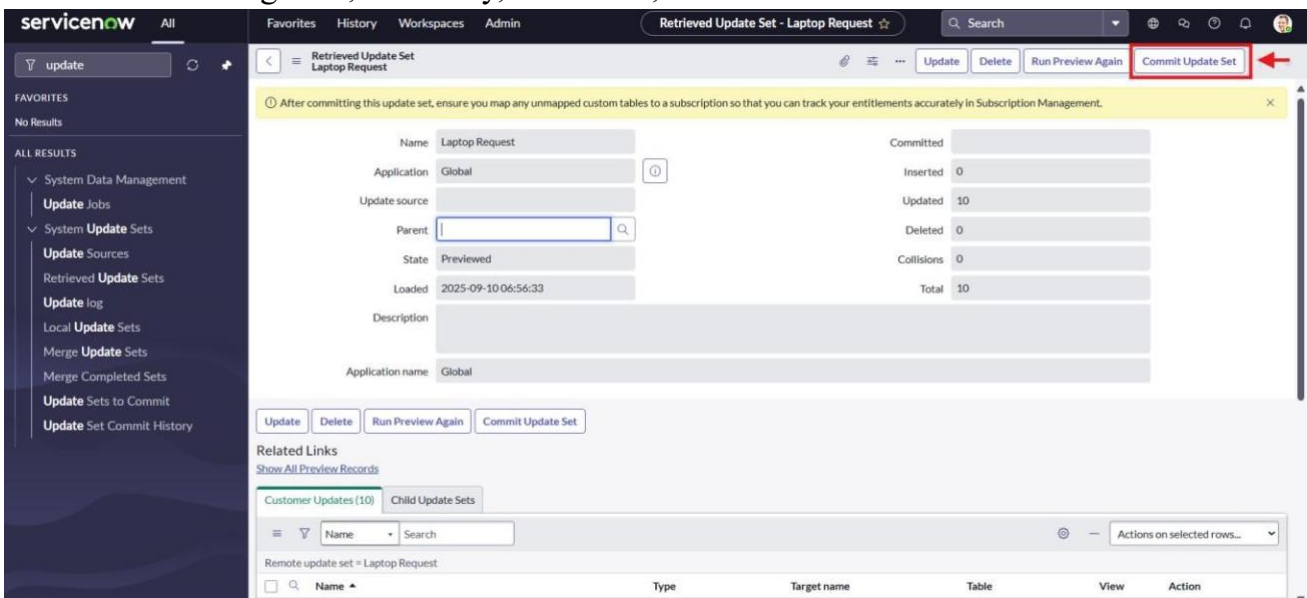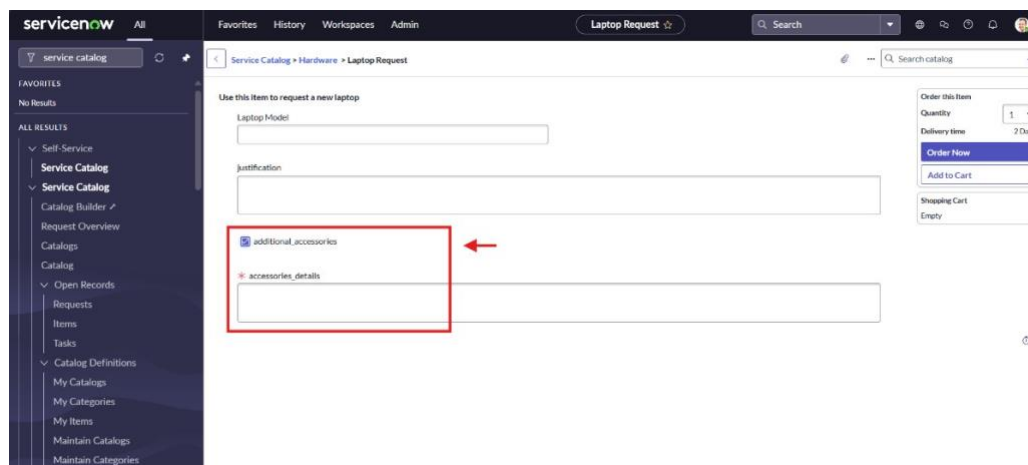
Milestone 8: Testing

Activity 1: Test the Catalog Item in target instance

1. In the target instance, search **Service Catalog** → open **Catalog** → choose **Hardware** category.
2. Find and open **Laptop Request**. Confirm the item shows the variables.

3. Test behaviour:
   - Without checking **Additional Accessories** → **Accessories Details** should be hidden.
   - Check **Additional Accessories** → **Accessories Details** must appear and be **mandatory**.
4. Test the Reset form UI action (if visible in shopping cart) to ensure it clears fields and shows the alert.
5. Record screenshots for proof of testing.

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.