Procedure for Laptop Request Catalog Item Implementation in ServiceNow

1. Create a Local Update Set

The Local Update Set is used to capture all configuration changes made during the development process. This helps in migrating customizations from one ServiceNow instance to another.

Steps:

1. **Open ServiceNow Instance:**
   - Log in to your ServiceNow developer instance using valid credentials.
2. **Access Update Sets:**
   - In the left navigation pane, click on **All** to expand the full menu.
   - In the filter navigator, type Update Sets.
   - Under **System Update Sets**, select **Local Update Sets**.
3. **Create a New Update Set:**
   - Click on **New** to create a new local update set.
   - Fill in the required details as follows:
     - **Name:** Laptop Request
     - **Description:** This update set contains all configurations related to the Laptop Request Catalog Item.
   - Click **Submit** to save.
4. **Activate the Update Set:**
   - After submitting, select the newly created update set ("Laptop Request").
   - Click **Make Current**.
   - By doing this, all subsequent changes will be captured in this update set automatically.

2. Create a Service Catalog Item

The Service Catalog Item represents the service that end-users can request. In this project, it

is the Laptop Request item.

Steps:

1. **Navigate to Catalog Items:**
   - Open the ServiceNow instance.
   - Click on **All** in the Application Navigator.
   - Type Service Catalog in the search box.
   - Under **Catalog Definitions**, click on **Maintain Items**.
2. **Create a New Item:**
   - Click on **New**.
   - Fill in the following fields:
     - **Name:** Laptop Request
     - **Catalog:** Service Catalog
     - **Category:** Hardware
     - **Short Description:** Use this item to request a new laptop
   - Click **Save** to store the new item.
   - This step creates a visible item in the Service Catalog, allowing users to request laptops directly through the platform.

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3. Add Variables to the Catalog Item

Variables define the data that users will input when submitting the catalog item form.

Steps:

1. **Access Variable List:**
   - After saving the Laptop Request catalog item form, scroll down to find the **Variables** related list.
   - Click on **New** to create a new variable.
2. **Add Variables One by One:**
   - **Variable 1:**
     - **Question:** Laptop Model
     - **Type:** Single Line Text
     - **Name:** laptop_model
     - **Order:** 100
     - Click **Submit**.
   - **Variable 2:**
     - **Question:** Justification
     - **Type:** Multi Line Text
     - **Name:** justification
     - **Order:** 200

- Click **Submit**.
  - ○ **Variable 3:**
    - ■ **Question:** Additional Accessories
    - ■ **Type:** Checkbox
    - ■ **Name:** additional_accessories
    - ■ **Order:** 300
    - ■ Click **Submit**.
  - ○ **Variable 4:**
    - ■ **Question:** Accessories Details
    - ■ **Type:** Multi Line Text
    - ■ **Name:** accessories_details
    - ■ **Order:** 400
    - ■ Click **Submit**.
3. **Finalize:**
   - ○ After adding all the above variables, they will appear under the **Variables** related list of the Laptop Request catalog item.
   - ○ Click **Save** again to confirm the updates.

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4. Create Catalog UI Policies

UI Policies control the behavior of fields dynamically, such as showing, hiding, or making fields mandatory based on conditions.

Steps:

1. **Navigate to Catalog UI Policies:**
   - ○ In the Application Navigator, click **All** and search for Service Catalog.
   - ○ Under **Catalog Definitions**, click **Maintain Items**.
   - ○ Search and select the **Laptop Request** item.
2. **Add a New UI Policy:**
   - ○ Scroll down to the **Catalog UI Policies** related list.
   - ○ Click on **New**.
   - ○ Enter:
     - ■ **Short Description:** Show Accessories Details
   - ○ **Catalog Condition:**
     - ■ **Field:** additional_accessories
     - ■ **Operator:** is
     - ■ **Value:** true
   - ○ **Save** the UI Policy (do not submit yet).
3. **Add UI Policy Actions:**
   - ○ Scroll down to the **Catalog UI Policy Actions** related list.

- ○ Click **New** and fill in:
  - ■ **Variable Name:** accessories_details
  - ■ **Mandatory:** True
  - ■ **Visible:** True
  - ■ **Order:** 100
- ○ Click **Save**, then **Save** again on the UI Policy form.
- ○ This ensures that when a user checks the "Additional Accessories" box, the "Accessories Details" field becomes visible and mandatory.

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5. Create a UI Action

UI Actions are buttons, links, or context menu items that perform specific actions. Here, we create a Reset Form button for the shopping cart.

Steps:

1. **Navigate to UI Actions:**
   - ○ Click **All** → search UI Actions.
   - ○ Under **System Definition**, select **UI Actions**.
2. **Create a New UI Action:**
   - ○ Click **New** and enter:
     - ■ **Table:** Shopping Cart (sc_cart)
     - ■ **Order:** 100
     - ■ **Action Name:** Reset Form
     - ■ **Client:** Checked
   - ○ **Add the Script:**
     JavaScript
     ```javascript
     function resetForm() {
         g_form.clearForm(); // Clears all fields in the form
         alert("The form has been reset.");
     }
     ```

   - ○ Click **Save** to activate the UI Action.
   - ○ This adds a "Reset Form" button to clear all user inputs on the catalog request form.

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6. Exporting Changes to Another Instance

To move your configurations to another ServiceNow instance, export the update set as an

XML file.

Steps:

1. **Open the Update Set:**
   ○ Click on **All** → search Update Sets.
   ○ Select **Local Update Sets**.
2. **Select the Created Update Set:**
   ○ Choose the **Laptop Request Project** update set.
3. **Set the State to Complete:**
   ○ Change **State** to **Complete** to finalize it.
4. **Export the Update Set:**
   ○ In the Related List under **Updates**, verify that all configuration changes are captured.
   ○ Click **Export to XML** — a file will be downloaded to your system.

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7. Retrieve the Update Set in Another Instance

Importing the update set allows another instance to use the same configurations.

Steps:

1. **Open Target Instance:**
   ○ Open another ServiceNow instance (preferably in an incognito browser window).
   ○ Log in using your credentials.
2. **Navigate to Retrieved Update Sets:**
   ○ Click **All** → search Update Sets.
   ○ Select **Retrieved Update Sets** under **System Update Sets**.
3. **Import the XML File:**
   ○ Click **Import Update Set from XML**.
   ○ Upload the previously downloaded XML file.
   ○ Click **Upload**.
4. **Preview and Commit:**
   ○ Open the uploaded update set (Laptop Request Project).
   ○ Click **Preview Update Set**.
   ○ Resolve any errors (if any).
   ○ Click **Commit Update Set**.
5. **Verification:**
   ○ Once committed, all configurations such as catalog items, UI policies, and UI actions will appear in the target instance.
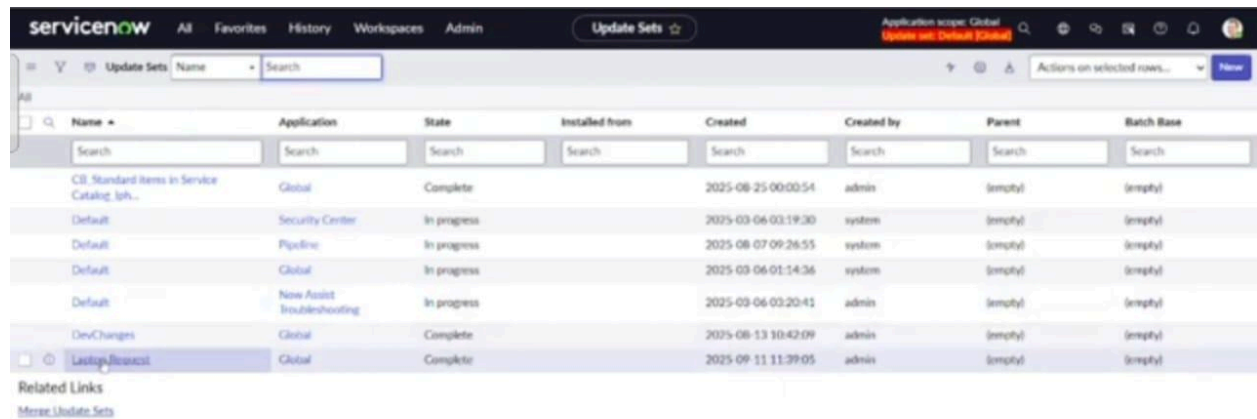
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8. Test the Catalog Item

Testing ensures that the catalog item works as expected in the target instance.
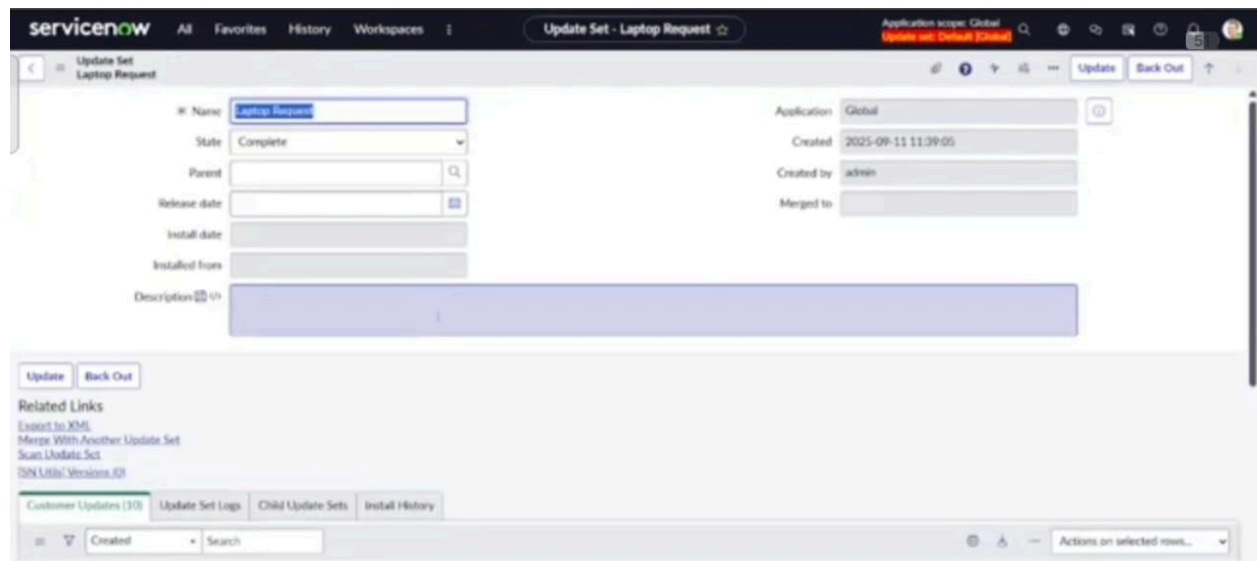
Steps:

1. **Open the Catalog:**
   - In the Application Navigator, search for Service Catalog.
   - Click **Catalog** under **Service Catalog**.
2. **Select the Category:**
   - Choose the **Hardware** category.
   - Find the **Laptop Request** item.
3. **Verify Variables and UI Policies:**
   - Open the **Laptop Request** form.
   - Confirm that it shows **Laptop Model**, **Justification**, and **Additional Accessories** fields.
4. **Test Conditional Visibility:**
   - Check the **Additional Accessories** box.
   - The **Accessories Details** field should appear and become mandatory.
   - Unchecking it should hide the field again.
5. **Validate UI Action:**
   - Use the **Reset Form** button to confirm it clears all fields.
6. **Submit the Request:**
   - Fill in all fields and submit the request.
   - Verify that the request appears in the system successfully.

Update Set
Laptop Request

⟨   ☰   Update Set
            Laptop Request   🔗 ❶ ⬆ ⬇ ⋯ | Update | Back Out | ⬆ ⋮

Description 🔲 </> | [   ] |

| Update | Back Out |

Create a Retrieved Update Set for exporting

Export to XML
Merge With Another Update Set
Scan Update Set
[SN Utils] Versions (0)

| Customer Updates (10) | Update Set Logs | Child Update Sets | Install History |

☰ ▽ | Created   ▼ | Search | ⚙ ⬇ — | Actions on selected rows... ▼ |

Update set = Laptop Request

☐ 🔍	Created	Type	View	Target name	Updated by	Remote update set	Action
	2025-09-11 11:52:44	Catalog UI Policy		Show Accessories Details	admin	(empty)	INSERT_OR_UPDATE
	2025-09-11 11:53:55	Catalog UI Policy Action		accessories_details	admin	(empty)	INSERT_OR_UPDATE
	2025-09-11 11:49:23	Variable		Additional Accessories	admin	(empty)	INSERT_OR_UPDATE
	2025-09-11 11:49:57	Variable		Accessories Details	admin	(empty)	INSERT_OR_UPDATE
	2025-09-11 11:46:41	Variable		Laptop Model	admin	(empty)	INSERT_OR_UPDATE
	2025-09-11 11:48:38	Variable		Justification	admin	(empty)	INSERT_OR_UPDATE

Creator Studio

Create request-based apps quickly
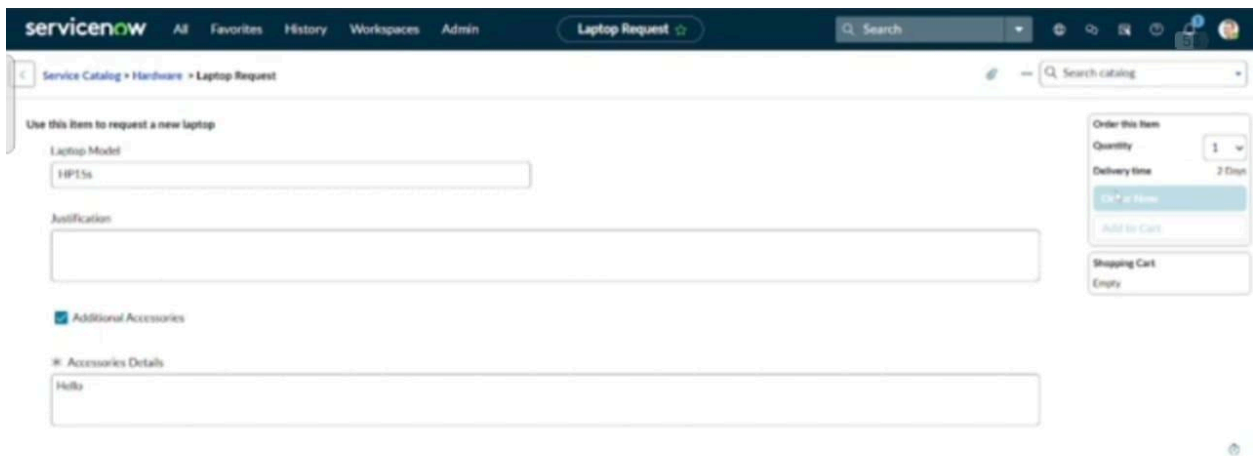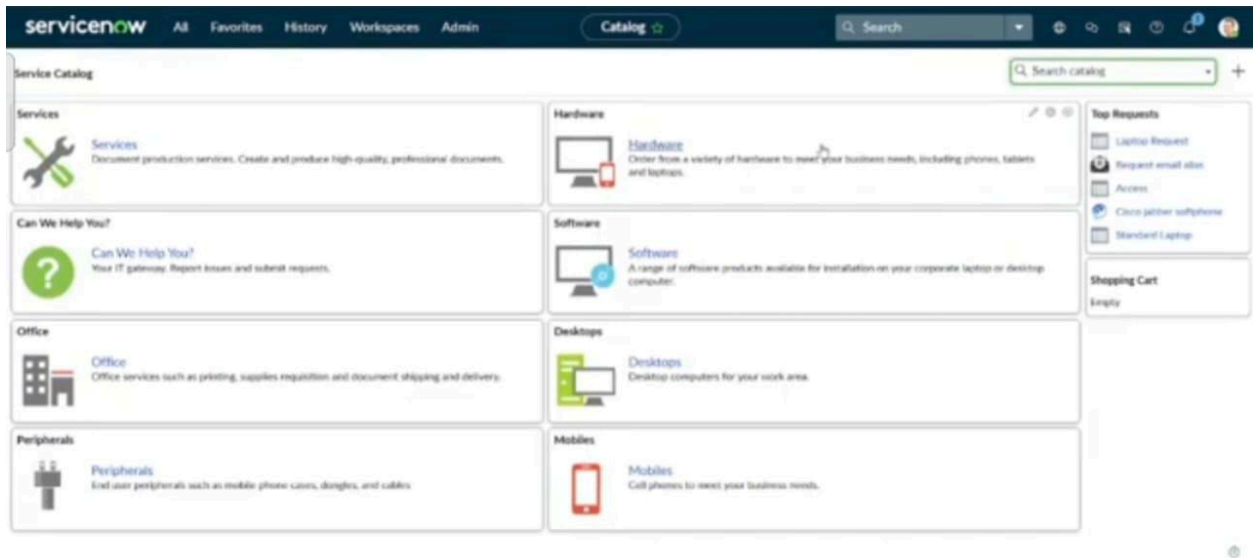
A guided and curated environment for creating forms and assigning
automations to them. No-code required.

| Open Creator Studio |

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Conclusion

This detailed procedure demonstrates the complete process of developing and deploying a Laptop Request Catalog Item in ServiceNow.

The steps — from creating a local update set to testing in a different instance — ensure that:

- All configurations are reusable and transferable.
- The request form behaves dynamically with user-friendly policies.
- Automation simplifies IT service management and asset handling.