

Project Title

Team Id: NM2025TMID13886

Team Members

Team Leader: VIPIN V NAIR

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Team Member 3: SAM ABISHEK

Objective: To streamline academic and administrative processes in educational institutions by providing a secure, integrated, and scalable Educational Management System on ServiceNow.

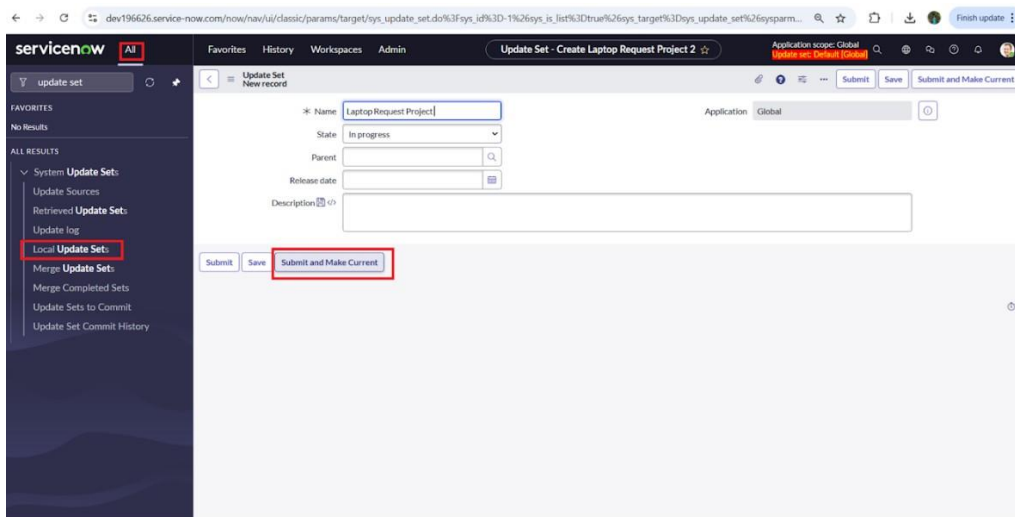
Skills: UIPath RPA ,Tanzu Application Service

TASK INITIATION

Milestone 1 : Create Local Update set

Activity 1: 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 contains a navigation menu with 'update set' selected. The main form area is titled 'Update Set - Create Laptop Request Project 2'. The form fields are as follows:

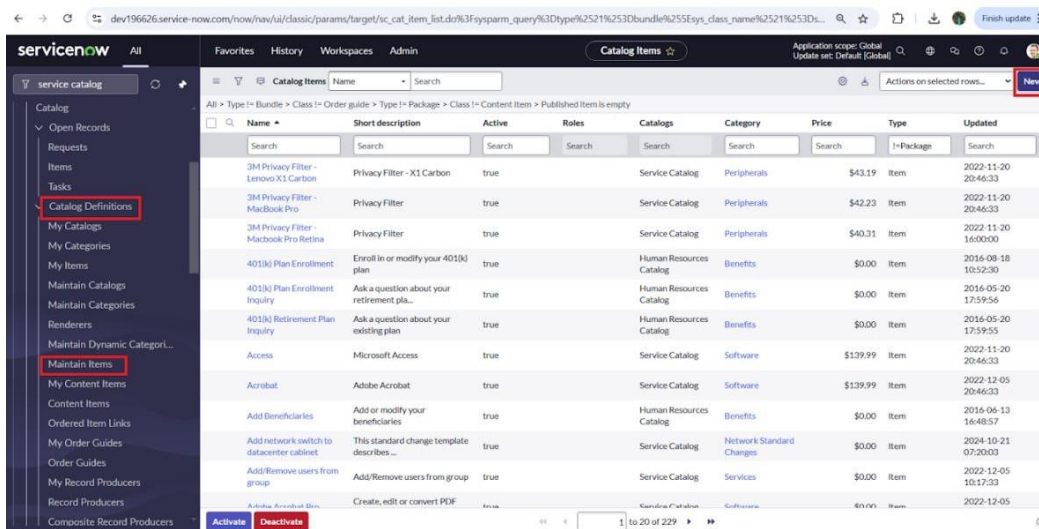
- Name: Laptop Request Project
- State: In progress
- Parent: (empty)
- Release date: (empty)
- Description: (empty)
- Application: Global

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.

Milestone 2 : Service Catalog Item

Activity 1: Create Service Catalog Item

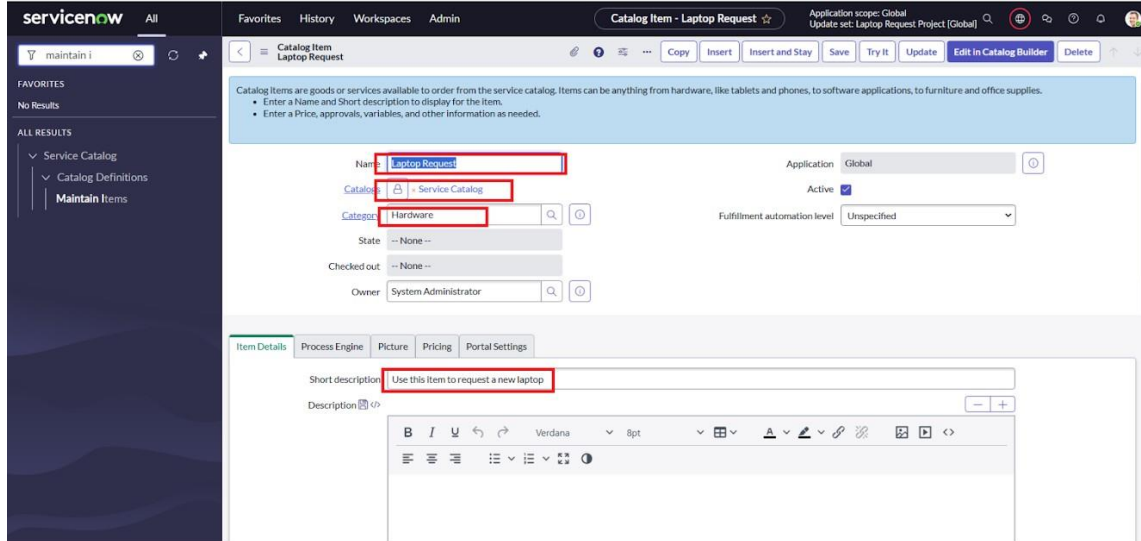
1. Open service now.
2. Click on All >> service catalog
3. Select maintain items under catalog definitions
4. Click on New.



The screenshot shows the ServiceNow interface for managing catalog items. The left-hand navigation pane is open, showing the 'Catalog' section with 'Catalog Definitions' and 'Maintain Items' highlighted. The main content area displays a table of catalog items. The table has columns for Name, Short description, Active, Roles, Catalogs, Category, Price, Type, and Updated. A 'New' button is located in the top right corner of the table area, indicating where to click to create a new catalog item.

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 17:59:56
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
Create, edit or convert PDF	Create, edit or convert PDF	true		Service Catalog	Software	\$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 the 'Service Catalog' and 'Catalog Definitions' sections, with 'Maintain Items' selected. 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

Step 1

After saving the catalog item form scroll down and click on variable(related list)

1. Click on new and enter the details as below

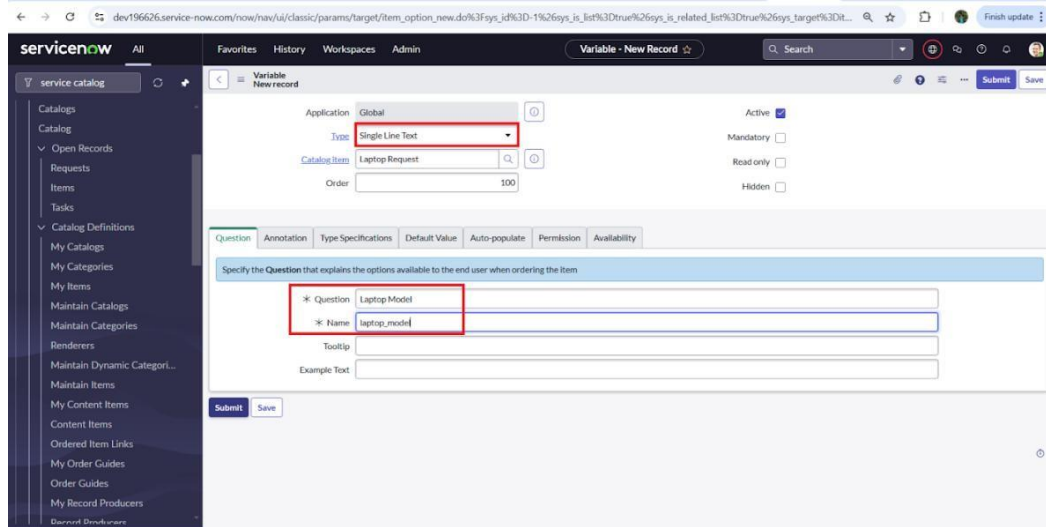
1. Variable 1:Laptop Model

Type: Single line text

Name: laptop_model

Order:100

- Click on submit
- Again click on new and add Remaining variables in the above proces



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

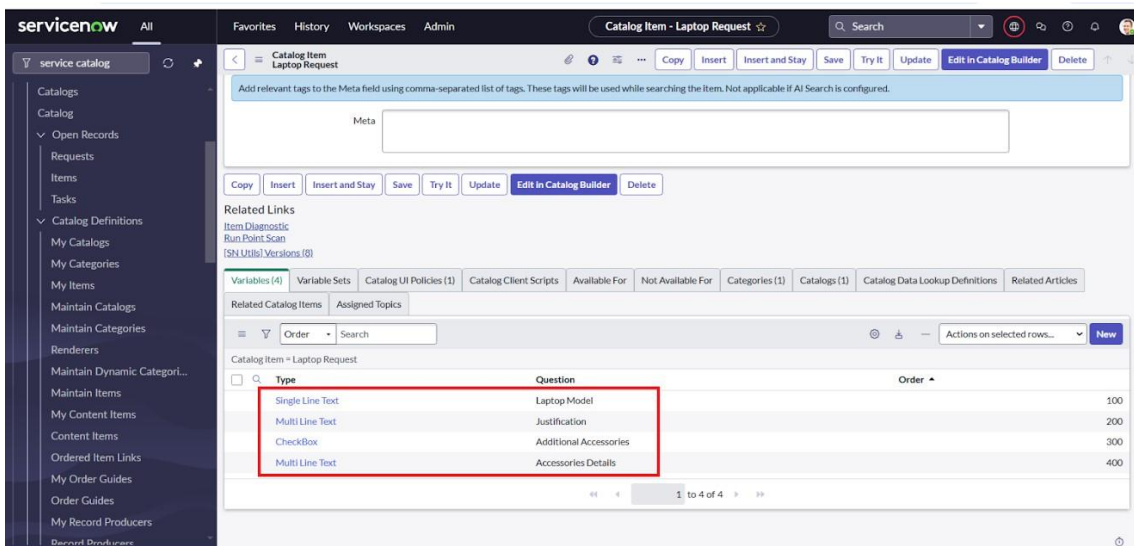
Type: Multi line text

Name:accessories_details

Order:400

Step2:

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



The screenshot shows the ServiceNow Catalog Item Builder interface for a 'Laptop Request' catalog item. The left sidebar contains navigation links for Catalogs, Open Records, Requests, Items, Tasks, Catalog Definitions, My Catalogs, My Categories, My Items, Maintain Catalogs, Maintain Categories, Renderers, Maintain Dynamic Categories, Maintain Items, My Content Items, Content Items, Ordered Item Links, My Order Guides, Order Guides, My Record Producers, and Demand Driven.

The main area displays the 'Catalog Item - Laptop Request' form. At the top, there is a 'Meta' field with a text input area and buttons for 'Copy', 'Insert', 'Insert and Stay', 'Save', 'Try It', 'Update', 'Edit in Catalog Builder', and 'Delete'. Below this is a 'Related Links' section with links for 'Item Diagnostic', 'Run Point Scan', and 'SN Utlis Versions (8)'. A tabbed interface shows 'Variables (4)' as the active tab, with other tabs for 'Variable Sets', 'Catalog UI Policies (1)', 'Catalog Client Scripts', 'Available For', 'Not Available For', 'Categories (1)', 'Catalogs (1)', 'Catalog Data Lookup Definitions', and 'Related Articles'.

Under the 'Variables' tab, there is a table of 'Related Catalog Items' with columns for 'Type', 'Question', and 'Order'. The table contains four rows, with the last two rows highlighted by a red box:

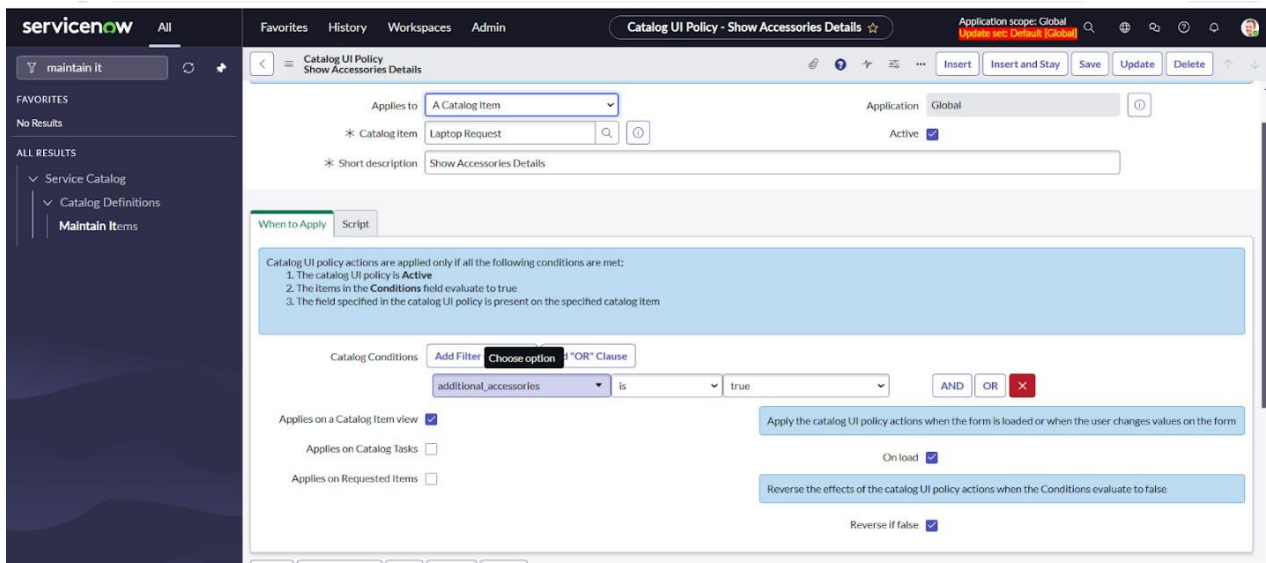
Type	Question	Order
Single Line Text	Laptop Model	100
Multi Line Text	Justification	200
CheckBox	Additional Accessories	300
Multi Line Text	Accessories Details	400

The bottom of the interface shows a pagination bar indicating '1 to 4 of 4' items.

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 'Maintain Items' selected. The main area is titled 'Catalog UI Policy - Show Accessories Details'. The 'Applies to' section is set to 'A Catalog Item' with 'Laptop Request' selected. The 'Application' is set to 'Global' and 'Active' is checked. The 'Short description' is 'Show Accessories Details'. The 'When to Apply' tab is selected, 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'. The 'Applies on a Catalog Item view' checkbox is checked. The 'Applies on Catalog Tasks' and 'Applies on Requested Items' checkboxes are unchecked. The 'On load' checkbox is checked, and the 'Reverse if false' checkbox is also checked. The 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form' checkbox is checked. The 'Reverse the effects of the catalog UI policy actions when the Conditions evaluate to false' checkbox is 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

servicenow All

Favorites History Workspaces Admin

Catalog UI Policy Action - accessories_details

service catalog

Request Overview
Catalogs
Catalog
Open Records
Requests
Items
Tasks
Catalog Definitions
My Catalogs
My Categories
My Items
Maintain Catalogs
Maintain Categories
Renderers
Maintain Dynamic Categori...
Maintain Items
My Content Items

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

Insert Insert and Stay **Save** Update Delete

Related Links
Run Point Scan
(SN URIs) Versions (1)

servicenow All

Favorites History Workspaces Admin

Catalog UI Policy - Show Accessories Details

Catalog UI Policy - Show Accessories Details
Catalog Task form: 3333.3333

Applies to: A Catalog Item
Application: Global
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 item in the Conditions field evaluates 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 OK X

Applies on 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 URIs) Versions (1)

UI policy - Show Accessories Details	Read only	Mandatory	Visible	Order
accessories_details	Leave alone	True	True	100

1 to 1 of 1

Milestone 4 : UI Action

Activity 1: 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

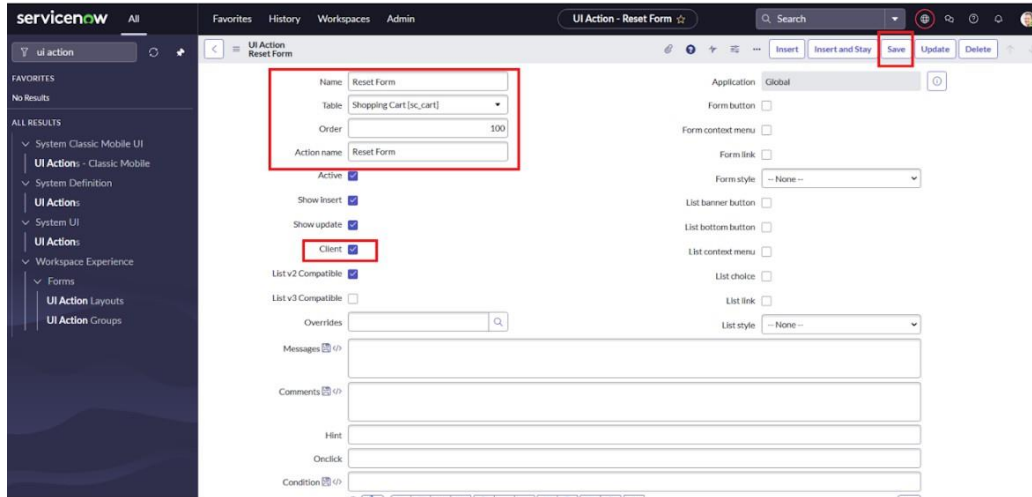
Action name: Reset form

Client : checked

Script:

```
function resetForm() {  
  g_form.clearForm(); // Clears all fields in the form  
  alert("The form has been reset.");  
}
```

Click on save

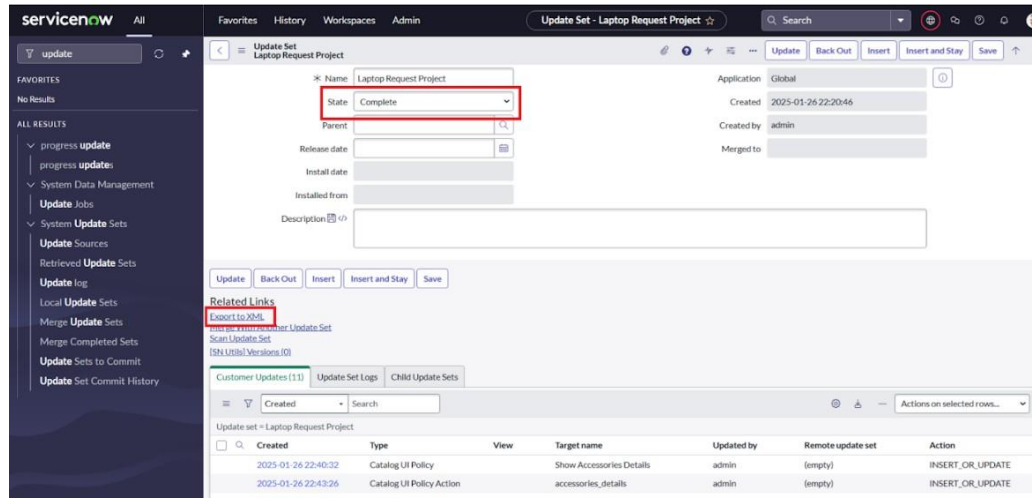


The screenshot shows the ServiceNow UI Action configuration interface. The left sidebar contains a navigation menu with categories like 'System Classic Mobile UI', 'UI Actions - Classic Mobile', 'System Definition', 'System UI', 'Workspace Experience', and 'Forms'. The main area is titled 'UI Action - Reset Form'. It includes fields for 'Name' (Reset Form), 'Table' (Shopping Cart [sc_cart]), 'Order' (100), and 'Action name' (Reset Form). There are checkboxes for 'Active', 'Show insert', 'Show update', 'List v2 Compatible', and 'List v3 Compatible'. A 'Client' checkbox is also present and checked. At the top right, there are buttons for 'Insert', 'Insert and Stay', 'Save', 'Update', and 'Delete'. The 'Save' button is highlighted with a red box.

Milestone 5 : Export Update set

Activity 1: 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



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:

Release date:

Install date:

Installed from:

Description:

Update Back Out Insert Insert and Stay Save

Related Links

Export to XML

Import from XML

Scan Update Set

SNL Update Set

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

Milestone 6 : Login to another Instance

Activity 1: 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 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

servicenow All

Favorites History Workspaces Admin Retrieved Update Sets

update

Retrieved Update Sets

ALL RESULTS

System Data Management

Update Jobs

System Update Sets

Update Sources

Retrieved Update Sets

Update log

Local Update Sets

Merge Update Sets

Merge Completed Sets

Update Sets to Commit

Update Set Commit History

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 guja	Global	Previewed	sandeep		2024-08-30 03:00:00	(empty)	(empty)	(empty)

Related Links

Import Update Set from XML

1 to 15 of 15

servicenow All

Favorites History Workspaces Admin Retrieved Update Set - Laptop Request Project

update

Retrieved Update Set - Laptop Request Project

Update Delete Run Preview Again Commit Update Set

After committing this update set, ensure you map any unmapped custom tables to a subscription so that you can track your entitlements accurately in Subscription Management.

Name Laptop Request Project

Application Global

Update source

Parent

State Previewed

Loaded 2025-01-27 22:14:51

Description

Application name Global

Committed

Inserted 11

Updated 0

Deleted 0

Collisions 0

Total 11

Update Delete Run Preview Again Commit Update Set

Related Links

Show All Preview Records

Customer Updates (11) Child Update Sets

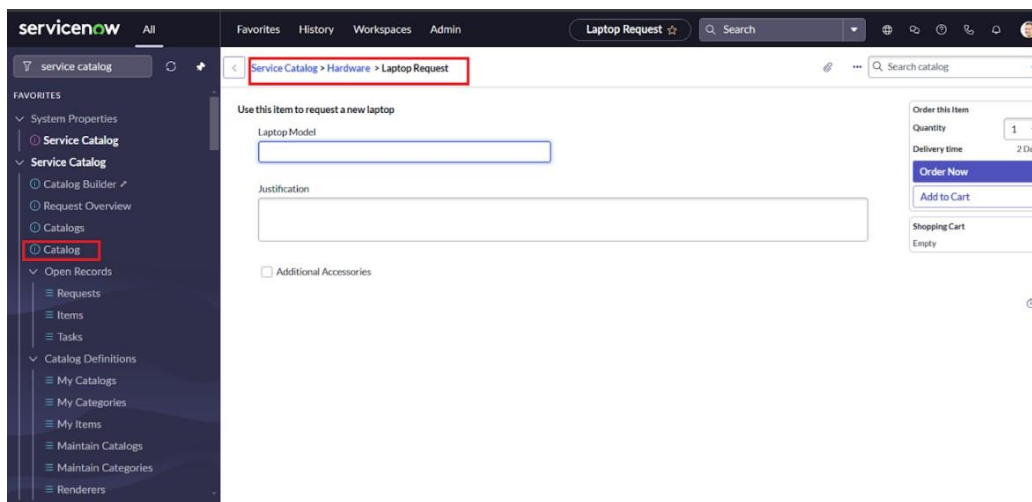
Name Search

Actions on selected rows...

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 As per our scenario, when we click on additional accessories checkbox then accessories



The screenshot displays the ServiceNow user interface for a 'Laptop Request' catalog item. The breadcrumb navigation at the top reads 'Service Catalog > Hardware > Laptop Request', with the entire path highlighted by a red rectangular box. On the left-hand sidebar, under the 'Service Catalog' section, the 'Catalog' link is also highlighted with a red box. The main content area is titled 'Use this item to request a new laptop' and contains several input fields: 'Laptop Model' (a text box), 'Justification' (a larger text area), and an 'Additional Accessories' checkbox. On the right side of the form, there is a section titled 'Order this Item' which includes a 'Quantity' dropdown set to '1', a 'Delivery time' of '2 Days', and two buttons: 'Order Now' (in blue) and 'Add to Cart'. Below these buttons, a 'Shopping Cart' section shows 'Empty'.

6. Details fields is visible and that should be mandatory
7. Now see the results, it fulfills our requirements.

servicenow

All

service catalog

+

Favorites

History

Workspaces

Admin

Laptop Request ☆

Search

Search catalog

Service Catalog > Hardware > Laptop Request

Search catalog

FAVORITES

System Properties

Service Catalog

Service Catalog

Catalog Builder

Request Overview

Catalogs

Catalog

Open Records

Requests

Items

Tasks

Catalog Definitions

My Catalogs

My Categories

My Items

Maintain Catalogs

Maintain Categories

Renderers

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.