

M.A.M COLLEGE OF ENGINEERING

***Topic : Calculating Family Expenses
using Servicenow***

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Calculating Family Expenses using Service Now

The project aims to develop a comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses efficiently. It will include features such as expense categorization, budget setting, real-time tracking, and reporting capabilities. Utilizing ServiceNow's robust platform, the project will ensure seamless integration, user-friendly interface, and scalability to accommodate varying family sizes and financial complexities. The end goal is to empower users with the tools they need to make informed financial decisions and promote financial well-being within the family unit.

Setting up ServiceNow Instance

1. Sign up for a developer account on the ServiceNow Developer site "<https://developer.servicenow.com>".
2. Once logged in, navigate to the "Personal Developer Instance" section.
3. Click on "Request Instance" to create a new ServiceNow instance.
4. Fill out the required information and submit the request.
5. You'll receive an email with the instance details once it's ready.
6. Log in to your ServiceNow instance using the provided credentials.
7. Now you will navigate to the ServiceNow.

Creation of New Update Set

1. Go to All >> In the filter search for Local Update set > click on New.



2. Enter the Details as:
Name : Family Expenses
3. Then click on Submit and Make current

This screenshot shows the "Update Set - Create New Update Set" screen in ServiceNow. The left sidebar has a red box around the "All" tab. The main form has a red box around the "Name" field, which contains "Family Expense". Other fields include "State: In progress", "Parent: (empty)", "Release date: (empty)", and "Description: (empty)". At the bottom, there are "Submit" and "Submit and Make Current" buttons, with the latter also having a red box around it.

Creation of Family Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:
Label : Family Expenses
Name : Auto-Populated
New menu name : Family Expenditure

Column label	Type	Reference	Max length	Default value	Display
Number	String				false
Date	Date				false
Amount	Integer				false

3. Go to the Header and right click there>> click on Save.

Creation of Columns(FIELDS)

1. Near Columns Double click near insert a new row.
2. Give the details as:

Column label : Number

Type : String

3. Double click on insert a new row again
4. Give the details as:

Column label : Date

Type : Date

5. Double click on insert a new row again
6. Give the details as:

Column label : Amount

Type : Integer

7. Double click on insert a new row again
8. Give the details as:

Column label : Expense Details

Type : String

Max length : 800

Column label	Type	Max length	Default value	Display
Number	String			false
Date	Date			false
Amount	Integer			false
Expense Details	String	800		false

9. Go to the Header and right click there>> click on Save.

Making Number Field an Auto-Number

1.Double click on the Number Field/Column.

2.Go down and double click on Advanced view

3.In Default Value:

Use dynamic default : check the box

Dynamic default value : Get Next Padded Number

4.Click on Update.

Choice List Specification Calculated Value Default Value ↗

The Default value specifies what value the field has when first displayed.

Use dynamic default ↗

Dynamic default value | Get Next Padded Number ↗

Delete Column Update ↗

5.Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

6.Click on New.

7.Enter the below Details:

Table : Family Expenses

Prefix : MFE

The screenshot shows a configuration interface for a table named 'Family Expenses'. The 'Table' field is highlighted with a red border. Other fields include 'Prefix' (MFE), 'Number' (mandatory, value 1.000), 'Application' (Global), and 'Number of digits' (7). There are 'Update' and 'Delete' buttons at the bottom.

8.Click on Submit

Configure the Form

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there >> click on Configure >> Select Form Design
4. Customize or Drag Drop the form as per your requirement.

The screenshot shows the 'Family Expenses' form design. It consists of two main sections: 'Number' and 'Expense Details'. The 'Number' section is displayed in 2 columns, while the 'Expense Details' section is displayed in 1 column. Each section has a gear icon and an 'X' icon.

5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

Creation of Daily Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:

Label : Daily Expenses

Name : Auto-Populated

Add Module to menu : Family Expenditure



3. Go to the Header and right click there>> click on Save.

Creation of Columns(FIELDS)

1. Near Columns Double click near insert a new row.
2. Give the details as:

Column label : Number

Type : String

3. Double click on insert a new row again
4. Give the details as:

Column label : Date

Type : Date

5. Double click on insert a new row again
6. Give the details as:

Column label : Expense

Type : Integer

7. Double click on insert a new row again
8. Give the details as:

Column label : Family Member Name

Type : Reference

Max length : 800

9. Double click on insert a new row again

10. Give the details as:

Column label : Comments

Type : String

Max length : 800

11. Go to the Header and right click there>> click on Save.

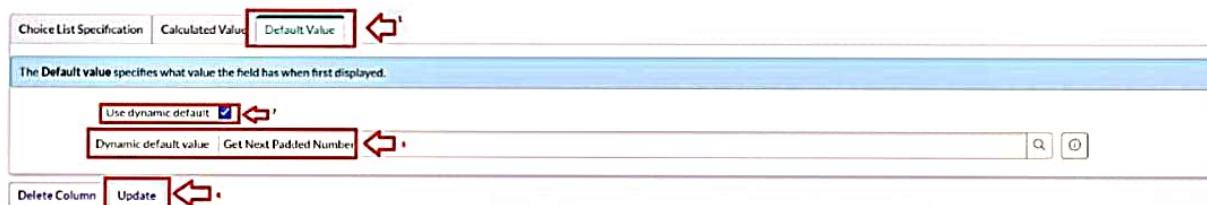
Making Number Field an Auto-Number

1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view
3. In Default Value:

Use dynamic default : check the box

Dynamic default value : Get Next Padded Number

4. Click on Update.



4. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

5. Click on New.

6. Enter the below Details:

Table : Family Expenses

Prefix : MFE

9. Click on Submit.

Configure the Form

1. Go to All >> In the filter search for Daily Expenses >> Open Daily Expenses
2. Click on New

- 3.Go to the Header and right click there>> click on Configure >> Select Form Design
- 4.Customize or Drag Drop the form as per your requirement.
- 5.Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
- 6.Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory
- 7.Click on Save.

Creation of Relationship between Family Expenses and Daily Expenses tables

1. Go to All >> In the filter search for Relationships >> Open Relationships
2. Click on New.
3. Enter the details: Go to All >> In the filter search for Business Rules.
4. Under System Definition Select Business Rules then click on New.
5. Enter the Details:

Name : Daily Expenses

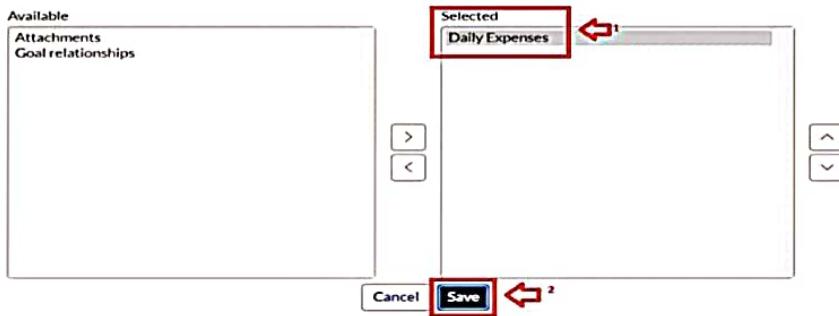
Applies to table : Select Family Expenses

Daily Expenses : Select Daily Expenses

6.Click Save.

Configuring Related List on Family Expenses

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save



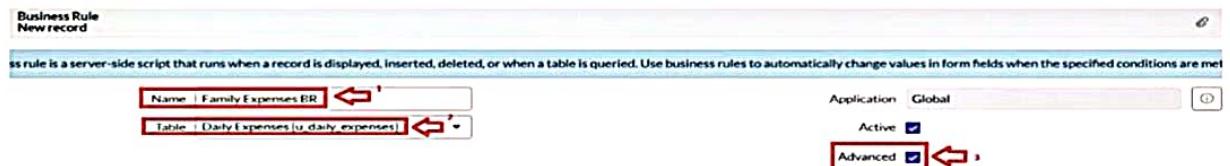
Creation of Business Rules

1. Go to All >> In the filter search for Business Rules.
2. Under System Definition Select Business Rules then click on New.
3. Enter the Details:

Name : Family Expenses BR

Table : Select Daily Expenses

Check Advanced



5. In Advance(we write the code): Write the below code >>

```
(function executeRule(current, previous /*null when async*/) {

    var FamilyExpenses = new GlideRecord('u_family_expenses');
    FamilyExpenses.addQuery('u_date', current.u_date);
    FamilyExpenses.query();
    if(FamilyExpenses.next())
    {
        FamilyExpenses.u_amount += current.u_expense;
    }
})
```

```

FamilyExpenses.u_expense_details +=  

">"+current.u_comments+":"+Rs."+current.u_expense+"/-";  

FamilyExpenses.update();  

}  

else  

{  

var NewFamilyExpenses = new GlideRecord('u_family_expenses');  

NewFamilyExpenses.u_date = current.u_date;  

NewFamilyExpenses.u_amount = current.u_expense;  

NewFamilyExpenses.u_expense_details +=  

">"+current.u_comments+":"+Rs."+current.u_expense+"/-";  

NewFamilyExpenses.insert();  

}  

})(current, previous);

```

6. Go to the Header and right click there>> click on Save

Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.
3. For Applies to table : Select Family Expenses.
4. In Query with : write the below Query.

```
(function refineQuery(current, parent) {  

// Add your code here, such as current.addQuery(field, value);  

current.addQuery('u_date',parent.u_date);  

current.query();  

})(current, parent);
```

5. Click on Update.