Date	25 June 2025
Team ID	LTVIP2025TMID20412
Project Name	Calculating Family Expenses using Service Now
Mentor Name	Dr Shaik Salma Begum
Maximum Marks	10 Marks

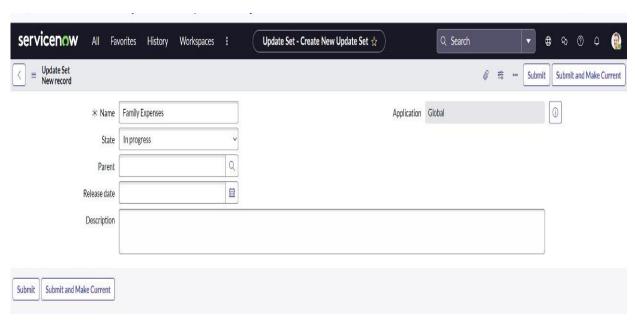
Calculating Family Expenses using Service Now

Milestone 1: Setting Up ServiceNow Instance:

- o Sign up on <u>developer.servicenow.com</u> and create a developer account.
- o Navigate to the Personal Developer Instance section and request a new instance.
- o Fill out the required information and submit the request.
- o Instance details (URL, username, password) will be sent via email.
- o Log in to the instance using the provided credentials.
- o The instance is ready for development and customization.

Milestone 2: Creation of New Update Set:

- Creating a Local Update Set in ServiceNow
 - Navigate to All in the application navigator.
 - o In the filter search bar, type Local Update Set and select it from the results.
 - Click on the New button to create a new update set.
 - Name: Family Expenses
 - o In the form that appears, enter the following details:
 - o Click on Submit to save the update set.
 - o After submission, click on Make Current to set this update set as the active one.
- Then created update set called "Family Expenses" and made it current



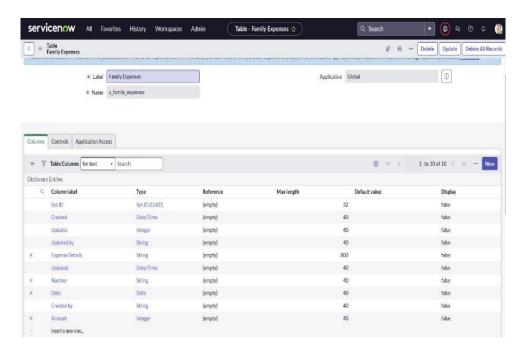
Milestone 3: Creation of Table (Family Expenses):

• Creation of Family Expenses tables and its fields:

Family Expenses Table Fields

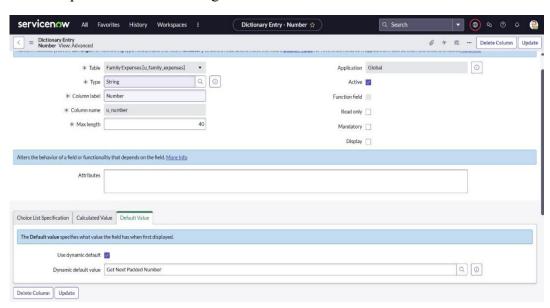
Field Name	Type	
Number	String	Auto populate Number with Prefix MFE
Date	Date	
Amount	Integer	
Expense Details	String	Max Length 800

- o Navigate to All in the application navigator.
- o In the filter search bar, type Tables and select it from the results.
- O Click on the New button to create a new table.
- o In the form, provide the following details:
 - Label: Family Expenses
 - Name: Auto-Populated (automatically generated based on the label)
 - New menu name: Family Expenditure
- o Navigate to the header section of the form, right-click on the header, and select Save from the context menu.

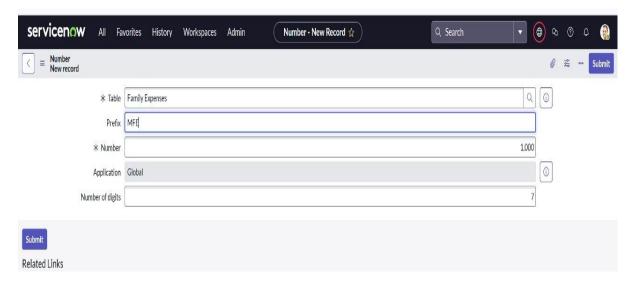


- Making Number Field an Auto-Number:
 - o In the Columns section of the *Family Expenses* table, locate and double-click on the Number field to open its configuration.
 - o Scroll down and double-click on Advanced view to expand additional settings.
 - o Under the Default Value section:
 - o Enable the checkbox for Use dynamic default.
 - Set the Dynamic default value to Get Next Padded Number.

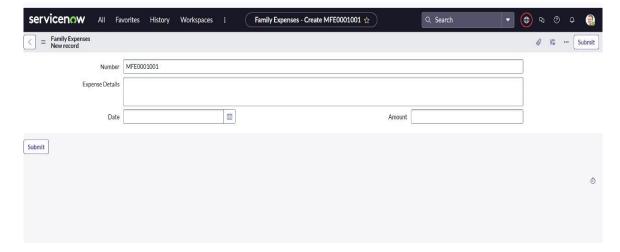
o Click on Update to save the changes to the field.



- Setting Up Number Maintenance for the Family Expenses Table
 - o Navigate to All in the application navigator.
 - o In the filter search bar, type Number Maintenance and select it from the list.
 - o Click on the New button to create a new number maintenance record.
 - o Provide the following details:
 - Table: Family Expenses
 - Prefix: MFE
 - Click on Submit to save the configuration.



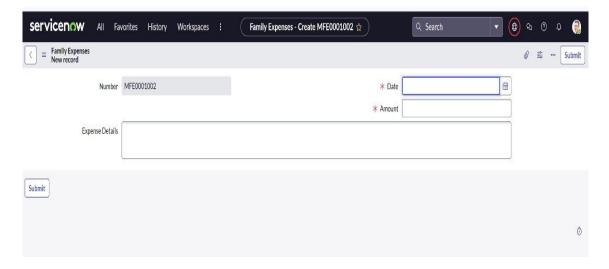
- Configure the Form:
 - o Navigate to All in the application navigator.
 - o In the filter search bar, type Family Expenses and select it from the results to open the module.
 - O Click on the New button to open a new record form.
 - o In the form header, right-click and select Configure > Form Design from the dropdown menu.
 - In the Form Designer, use drag-and-drop functionality to customize the layout of the form fields as needed. Fields can be rearranged, moved between sections, or grouped based on specific requirements.
 - o Once the desired layout has been achieved, click Save or Close to apply the changes.
 - Before Form design:



• Form design:



• After form design:



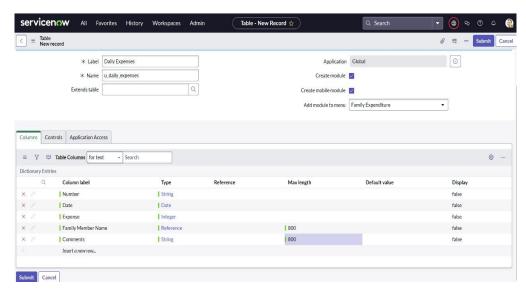
Milestone 4: Creation of Table (Daily Expenses):

• Creation of Daily Expenses Table and its fields:

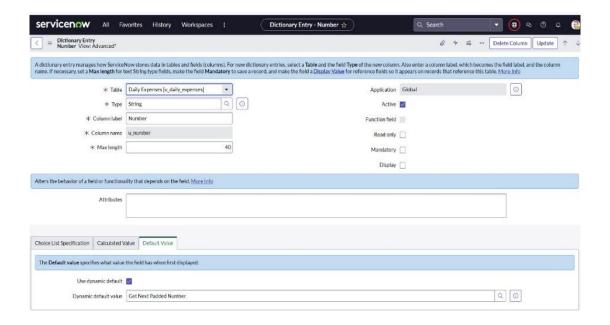
Daily Expenses Table Fields

Field Name	Type	
Number	String	Auto populate Number with Prefix DFE
Family Member Name	Reference	Sys_User
Date	Date	
Expense	Integer	
Comments	String	Max Length 800

- o Navigate to All in the application navigator.
- o In the filter search bar, type Tables and select it from the list.
- O Click on the New button to create a new table.
- o Fill in the following details in the form:
 - Label: Daily Expenses
 - Name: Auto-Populated (automatically generated based on the label)
 - Add Module to menu: Family Expenditure
- o Navigate to the header of the form, right-click, and select Save from the context menu.



- Making Number Field an Auto-Number:
 - o In the Columns section of the Daily Expenses table, locate and double-click on the Number field to open its configuration.
 - o Scroll down and double-click on Advanced view to expand additional settings.
 - o Under the Default Value section:
 - o Enable the checkbox for Use dynamic default.
 - o Set the Dynamic default value to Get Next Padded Number.
 - o Click on Update to save the changes to the field.

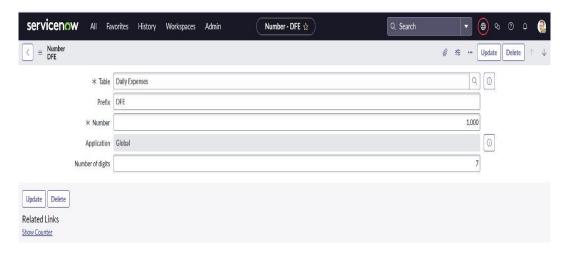


- Setting Up Number Maintenance for the Daily Expenses Table
 - o Navigate to All in the application navigator.
 - o In the filter search bar, type Number Maintenance and select it from the list.
 - o Click on the New button to create a new number maintenance record.
 - o Provide the following details:

Table: Daily Expenses

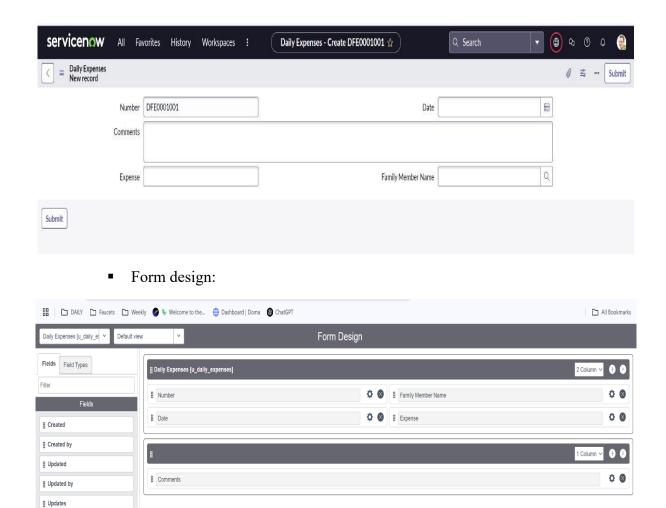
Prefix: DFE

o Click on Submit to save the configuration.

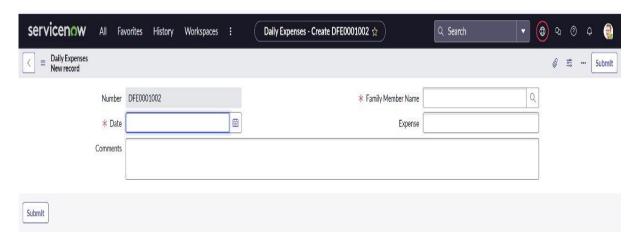


• Configure the Form:

- o Navigate to All in the application navigator.
- o In the filter search bar, type Daily Expenses and select it from the results to open the module.
- o Click on the New button to open a new record form.
- o In the form header, right-click and select Configure > Form Design from the dropdown menu.
- In the Form Designer, use drag-and-drop functionality to customize the layout of the form fields as needed. Fields can be rearranged, moved between sections, or grouped based on specific requirements.
- Once the desired layout has been achieved, click Save or Close to apply the changes.
 - Before Form design:



• After form design:



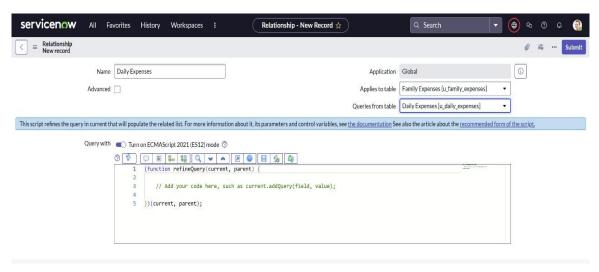
Milestone 5: Creation of Relationship:

- Creation of Relationship between Family Expenses and Daily Expenses tables
 - Navigate to All in the application navigator.
 - o In the filter search bar, type Relationships and select it from the list.
 - O Click on the New button to create a new relationship.
 - Enter the following details:
 - Name: Daily Expenses

Applies to Table: Family Expenses

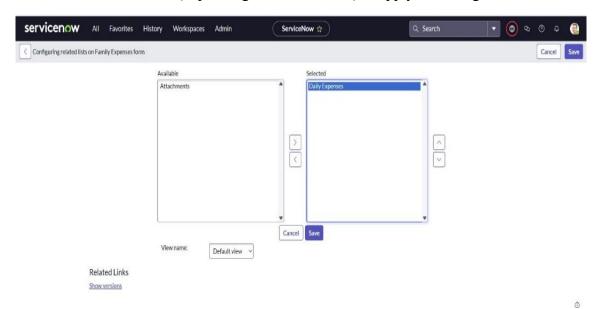
Queries to Table: Daily Expenses

• Click Save to store the relationship.



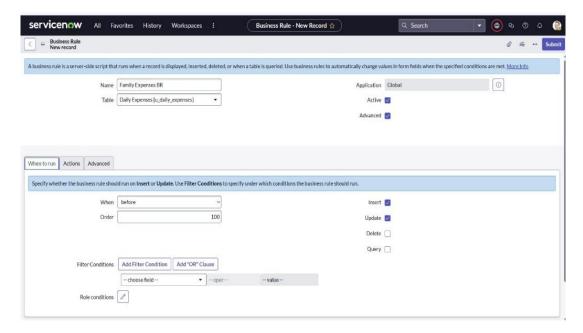
Milestone 6: Configuring Related List on Family Expenses:

- o Navigate to All in the main menu.
- o In the filter/search bar, type Family Expenses, then select and open the Family Expenses module.
- o Click on the New button to create a new Family Expenses record.
- o In the header section of the screen, right-click and choose Configure from the context menu.
- o From the configuration options, select Related Lists.
- o In the Related Lists configuration screen, locate Daily Expenses in the available list.
- Move Daily Expenses to the Selected area to include it in the related lists for Family Expenses.
- o Click Save or Done (depending on the interface) to apply the changes.

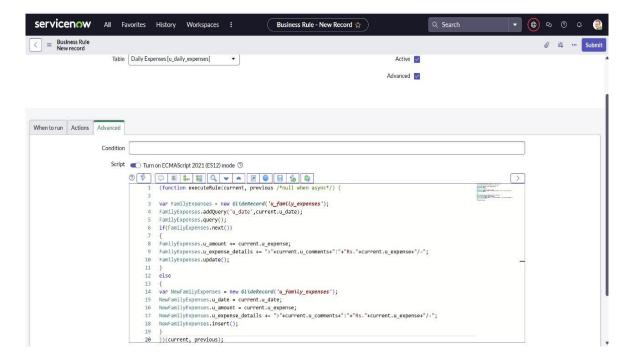


Milestone 7: Creation of Business Rules:

- o From the main navigation, go to All.
- o In the search or filter bar, type Business Rules.
- o Under the System Definition section, click on Business Rules.
- O Click on the New button to create a new business rule.
- o Fill in the Business Rule Details:
 - Name: Family Expenses BR
 - Table: Select Daily Expenses from the dropdown list.
- o Check the box labeled Advanced to enable additional configuration options.
- Configure When to Run: Under the When to Run section, make sure the following options are checked:
 - Insert
 - Update



O In Advance (write the code): Write the below code >>>



Milestone 8: Configure the Relationship:

- o From the main navigation, go to All.
- o In the search bar, type Relationships, then open the Relationships module.
- o Locate and open the Daily Expenses Relationship record.
- o Set the Following Details:
 - > For Applies to table, select Family Expenses from the dropdown list.
- o After entering the script, click Update to save your changes.

