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

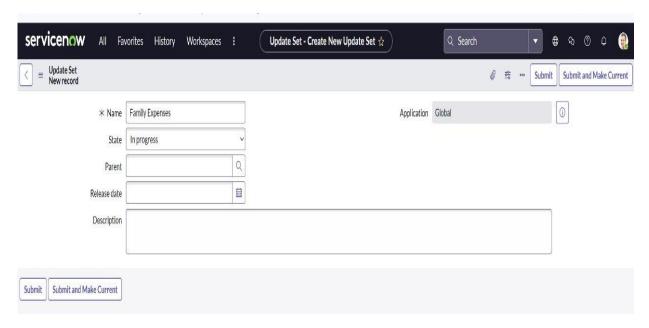
Calculating Family Expenses using Service Now

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
 - o 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



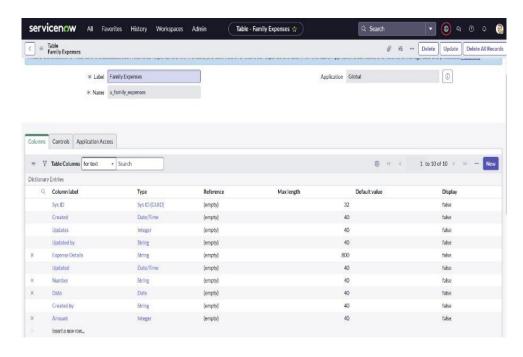
Milestone 3: Creation of Table (Family Expenses):

• Creation of Family Expenses tables and its fields:

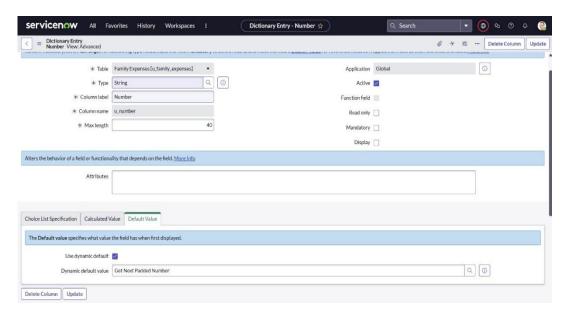
Family Expenses Table Fields

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

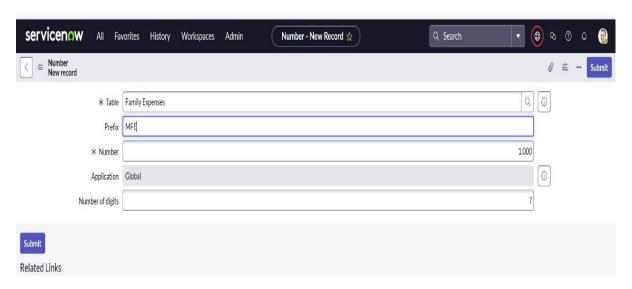
- o Navigate to All in the application navigator.
- o In the filter search bar, type Tables and select it from the results.
- O Click on the New button to create a new table.
- o In the form, provide the following details:
 - Label: Family Expenses
 - Name: Auto-Populated (automatically generated based 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.
 - o Set the Dynamic default value to Get Next Padded Number.
 - o Click on Update to save the changes to the field.

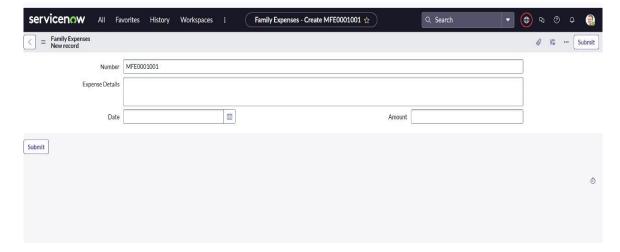


- Setting Up Number Maintenance for the Family Expenses Table
 - o Navigate to All in the application navigator.
 - o In the filter search bar, type Number Maintenance and select it from the list.
 - o Click on the New button to create a new number maintenance record.
 - Provide the following details: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



Configure the Form:

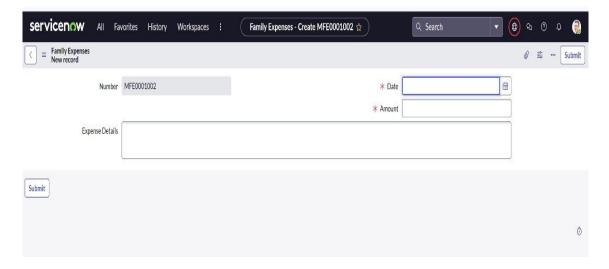
- o Navigate to All in the application navigator.
- o In the filter search bar, type Family Expenses and select it from the results to open the module.
- O Click on the New button to open a new record form.
- o In the form header, right-click and select Configure > Form Design from the dropdown menu.
- 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.
- Once the desired layout has been achieved, click Save or Close to apply the changes.
 - Before Form design:



• Form design:



• After form design:



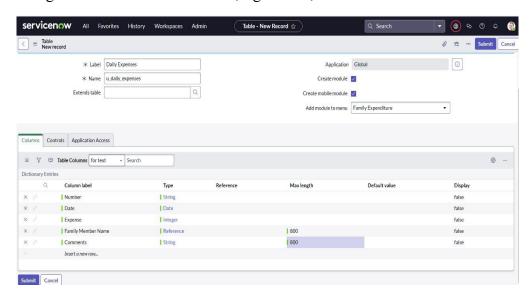
Milestone 4: Creation of Table (Daily Expenses):

• Creation of Daily Expenses Table and its fields:

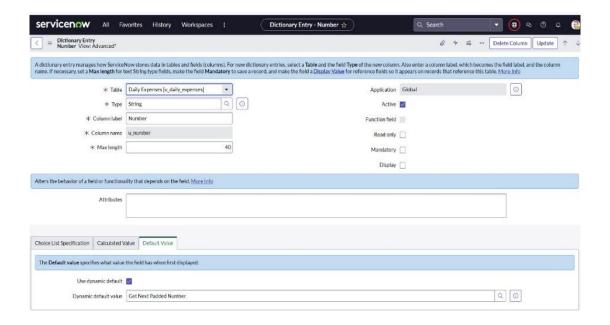
Daily Expenses Table Fields

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.

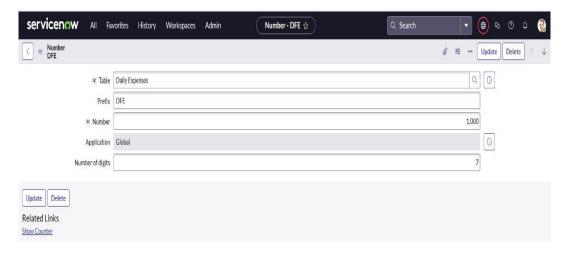


- Setting Up Number Maintenance for the Daily Expenses Table
 - o Navigate to All in the application navigator.
 - o In the filter search bar, type Number Maintenance and select it from the list.
 - o Click on the New button to create a new number maintenance record.
 - o Provide the following details:

Table: Daily Expenses

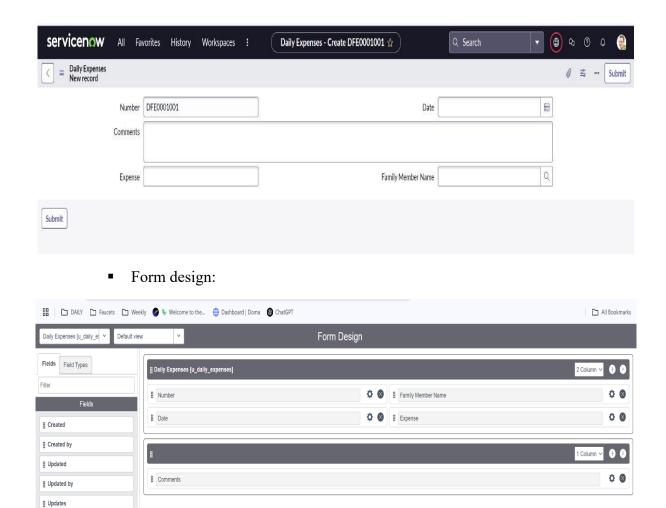
Prefix: DFE

Click on Submit to save the configuration.

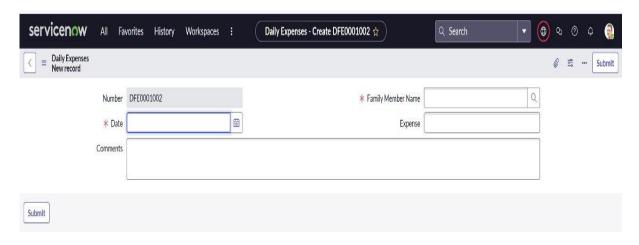


• Configure the Form:

- 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:



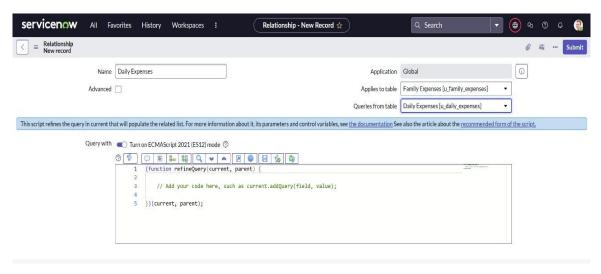
Milestone 5: Creation of Relationship:

- 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.
 - o Enter the following details:
 - Name: Daily Expenses

Applies to Table: Family Expenses

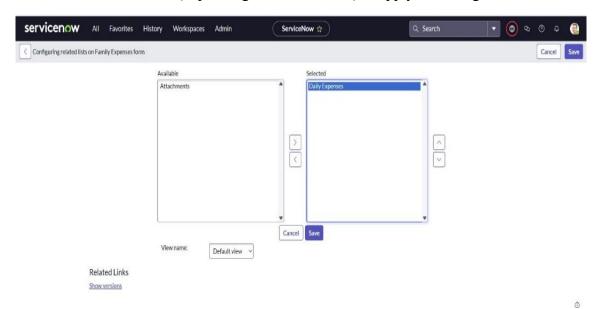
Queries to Table: Daily Expenses

Click Save to store the relationship.



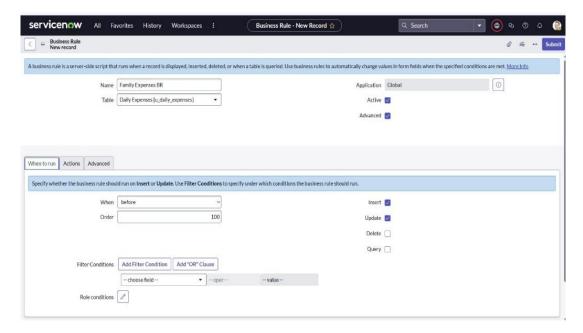
Milestone 6: Configuring Related List on Family Expenses:

- 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.

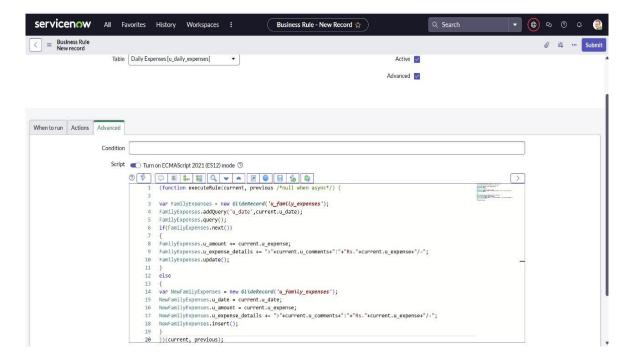


Milestone 7: Creation of Business Rules:

- 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.

