MANGAYARKARASI COLLEGE OF ENGINEERING

Department Of Computer Science Engineering

Completed a project on

Calculating Family Expenses Using Service Now

Submitted By

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Calculating Family Expenses using Service Now

Project Statement

The project focuses on developing a Family Expense Management System using ServiceNow to help families efficiently record, track, and manage their daily and overall expenses. It includes key features such as expense categorization, budget management, real-time tracking, and detailed reporting. This system empowers users to make informed financial decisions, monitor spending patterns, and promote better financial planning. Additionally, it enhances transparency within families, supports goal-based savings, and simplifies monthly expense reviews for improved financial discipline.

Objectives

- To create a centralized platform for recording family expenses.

- To automate calculation and tracking of daily and monthly expenses.

- To establish relationships between daily expense entries and total family expenses.

- To generate reports that help analyze spending patterns.

- To make the system user-friendly, scalable, and reliable using ServiceNow's platform

Skills Required

- ServiceNow Platform (Instance setup, Update Sets, Tables, Business Rules).

- Form Design & Customization (creating fields, configuring mandatory/read-only attributes).

- Scripting (GlideRecord, Business Rules in JavaScript) for automation.

- Database Concepts (tables, relationships, and data integrity).

- Problem-Solving & Analytical Thinking for mapping real-life financial scenarios into a digital

  system

Tasks & Initiation

- Define the project scope – family expense tracking and reporting system.
- Set up a ServiceNow Personal Developer Instance.
- Create a new Update Set for customization.
- Design and create necessary tables (Family Expenses, Daily Expenses).
- Define fields/columns (Number, Date, Amount, Expense Details, Member Name, Comments).
- Implement auto-numbering for expense records.
- Configure forms with mandatory/read-only rules.
- Establish relationships between Family Expenses and Daily Expenses tables.
- Write Business Rules to automate calculations.
- Configure reports/related lists for data visualization.

Project statement:

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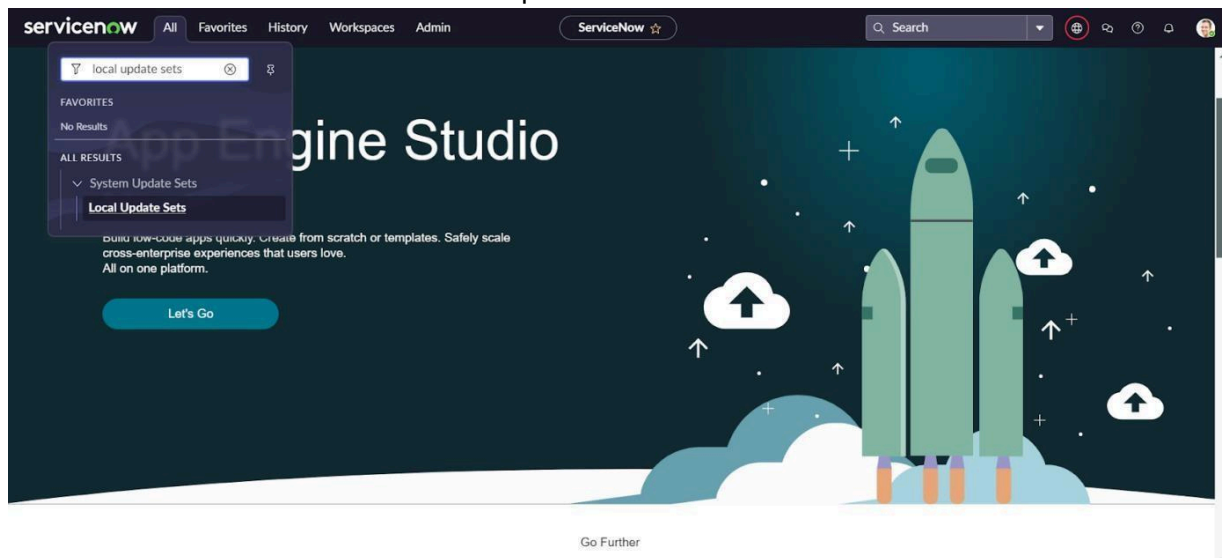
2. Enter the Details as:
   Name : Family Expenses
3. Then click on Submit and Make current.

MILESTONE 3

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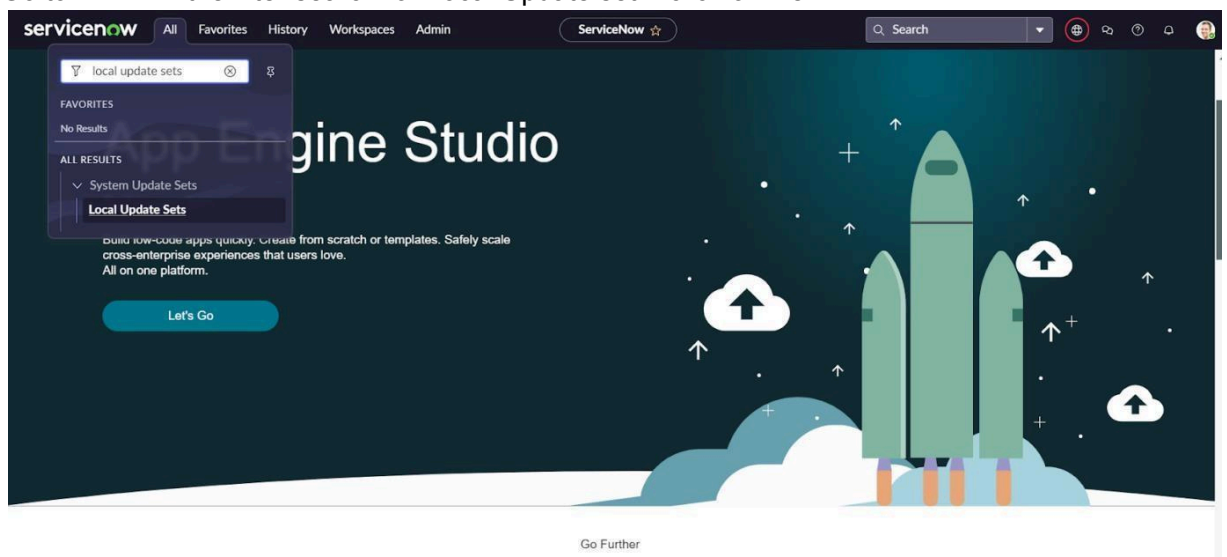
1. Go to All >> In the filter search for Local Update set > click on New.

2. Enter the Details as:

Name : Family Expenses
3.   Then click on Submit and Make current.

MILESTONE 4

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

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

MILESTONE 5

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

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.

5.
6.   Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7.   Click on New.
8.   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 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.

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.

MILESTONE 8

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:

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

Column label :
Date Type : Date

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

Column label :
Expense Type :
Integer

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.

5.
6.   Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
7.   Click on New.
8.   Enter the below Details:
       Table : Family Expenses
       Prefix : MFE

9.   Click on Submit.

MILESTONE 11

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:
   Name : Daily Expenses
   Applies to table : Select Family Expenses
   Daily Expenses : Select Daily Expenses

4.   Click Save.

Configuring Related List on Family Expenses

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

4. In when to run Check Insert and Update

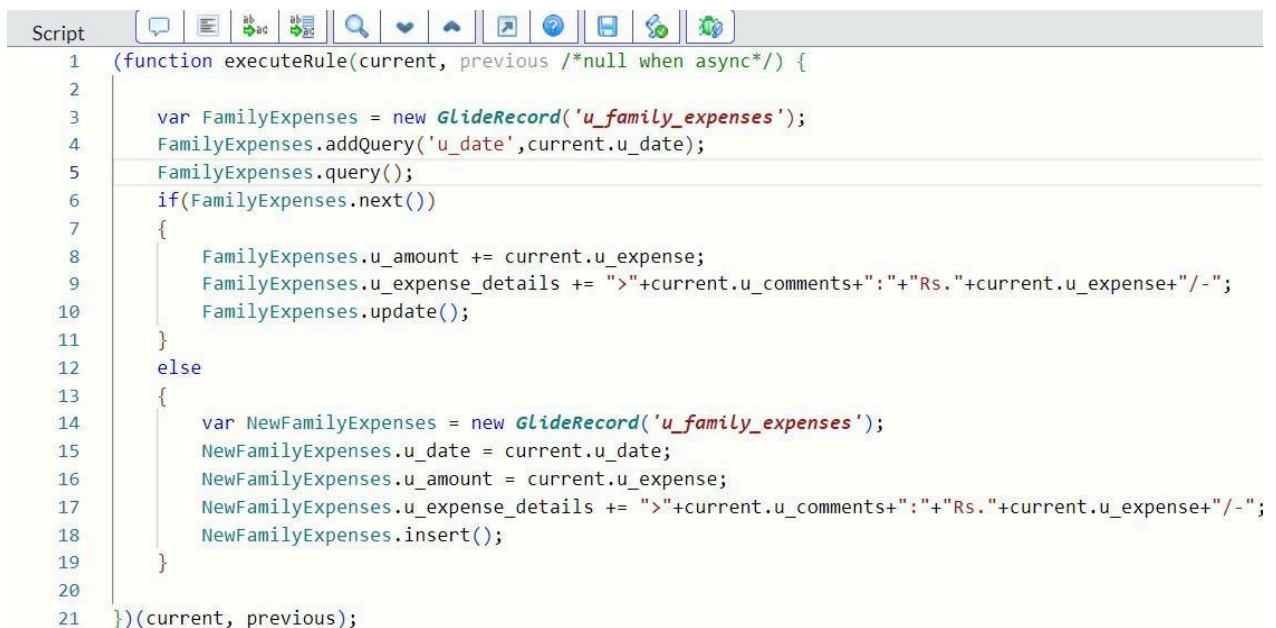5. In Advance(we write the code): Write the below code >>

```
(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);
```

```
Script
   1   (function executeRule(current, previous /*null when async*/) {
   2
   3       var FamilyExpenses = new GlideRecord('u_family_expenses');
   4       FamilyExpenses.addQuery('u_date',current.u_date);
   5       FamilyExpenses.query();
   6       if(FamilyExpenses.next())
   7       {
   8           FamilyExpenses.u_amount += current.u_expense;
   9           FamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
  10           FamilyExpenses.update();
  11       }
  12       else
  13       {
  14           var NewFamilyExpenses = new GlideRecord('u_family_expenses');
  15           NewFamilyExpenses.u_date = current.u_date;
  16           NewFamilyExpenses.u_amount = current.u_expense;
  17           NewFamilyExpenses.u_expense_details += ">"+current.u_comments+":"+"Rs."+current.u_expense+"/-";
  18           NewFamilyExpenses.insert();
  19       }
  20
  21   })(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.

Available

Attachments
Goal relationships

Selected

Daily Expenses   ⬅ 1

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∧
∨

Cancel   **Save**   ⬅ 2