Optimizing User, Group, and Role Management with Access Control and Workflows

FAMILY EXPENSES

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Team Members: 4

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Problem 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.

Objective: The "family expensive project" phrase seems to be a misunderstanding, but if referring to ServiceNow's Strategic Portfolio Management (SPM), also known as Project Portfolio Management (PPM), its objective is to strategically manage and optimize a portfolio of projects by aligning them with business goals, providing real-time visibility into performance, and improving agility and resource allocation to deliver maximum customer value.

Skills: Service now Family expenses IOT Open Hardware platforms, Data Structures

TASK INITIATION

Milestone 1: update set

Activity 1: Local update set

1. Open service now

2. Click on All >> search for Local update

3. Click on new

4. Name: Family Expenses

5. Then click on submit and make current.

Milestone 2: CREATION OF TABLE

Activity 1: TABLE

1. Open service now.

2. Click on All >> search for Table

3. Click on new.

4. Label: Family Expenses, Name: Auto-Populated, New menu name: Family Expenditure.

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

Activity 2: 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, Column label: Date, Type: Date

4. Double click on insert a new row again, Column label: Amount, Type: Integer

5. Double click on insert a new row again, Column label: Expense Details, Type: String, Max length: 800

ACTIVITY3: 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. 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

8. Click on Submit.

ACTIVITY 4: CONFIGER 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.

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Conclusion: A successful ServiceNow "family" (project or platform) implementation, even a costly one, is concluded by demonstrating tangible business value through strategic alignment, improved operational efficiency, and positive user satisfaction. Achieving these outcomes requires senior expertise, comprehensive process mapping, a strong focus on configuration over customization, and ongoing transparent communication to manage risks, ensuring the project delivers its intended benefits and a positive return on investment.