Project Report

Project Details

Project Title: Calculating Family Expenses using Service Now

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Team Size: 4

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TABLE OF CONTENT

Step 1: Setting up ServiceNow Instance

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

Step 2: Creation of New Update Set

Go to All >> In the filter search for Local Update set > click on New.
Enter the Details as:

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

Step 3: Creation of Family Expenses Table

Go to All > In the filter search for Tables > click on New.
Enter the Details:
Label : Family Expenses
Name : Auto-Populated
New menu name : Family Expenditure
Go to the Header and right click there>> click on Save..

Step 4: Creation of Columns(Fields)

Near Columns Double click near insert a new row.
1. Column label : Number, Type : String
2. Column label : Date, Type : Date
3. Column label : Amount, Type : Integer
4. Column label : Expense Details, Type : String, Max length : 800
Go to the Header and right click there>> click on Save.

Step 5: Making Number Field an Auto-Number

Double click on the Number Field/Column. Go down and double click on Advanced view.
In Default Value: Use dynamic default : check the box
Dynamic default value : Get Next Padded Number
Click on Update.
Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
Click on New.
Enter the below Details: Table : Family Expenses Prefix : MFE Click on Submit.

Step 6: Configure the Form

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 Form Design
Customize or Drag Drop the form as per your requirement.
Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
Click on Save.

Step 7: Creation of Daily Expenses Table

Go to All > In the filter search for Tables > click on New.
Enter the Details:
Label : Daily Expenses
Name : Auto-Populated
Add Module to menu : Family Expenditure
Go to the Header and right click there>> click on Save.

Step 8: Creation of Columns(Fields) for Daily Expenses

Near Columns Double click near insert a new row.
1. Column label : Number, Type : String
2. Column label : Date, Type : Date
3. Column label : Expense Type, Type : Integer
4. Column label : Family Member Name, Type : Reference, Max length : 800
5. Column label : Comments, Type : String, Max length : 800
Go to the Header and right click there>> click on Save.

Step 9: Making Number Field an Auto-Number for Daily Expenses

Double click on the Number Field/Column. Go down and double click on Advanced view.
In Default Value: Use dynamic default : check the box
Dynamic default value : Get Next Padded Number
Click on Update.
Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
Click on New. Enter the below Details: Table : Family Expenses Prefix : MFE
Click on Submit.

Step 10: Configure the Daily Expenses Form

Go to All >> In the filter search for Daily Expenses >> Open Daily Expenses
Click on New Go to the Header and right click there>> click on Configure >> Select Form
Design
Customize or Drag Drop the form as per your requirement.
Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking
Mandatory
Click on Save.

Step 11: 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

Step 12: Creation of Business Rules

Go to All >> In the filter search for Business Rules.
Under System Definition Select Business Rules then click on New.
Enter the Details: Name : Family Expenses BR Table : Select Daily Expenses Check Advanced
In when to run Check Insert and Update
In Advance(we write the 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);
```

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

Step 13: Configure the Relationship

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

```
(function refineQuery(current, parent) {
 current.addQuery('u_date',parent.u_date);
 current.query();
})(current, parent);
```

Click on Update.

Step 14: Conclusion

The project successfully demonstrates the implementation of a Family Expenses
management system using ServiceNow.
It covers the creation of tables, forms, fields, related lists, business rules, and relationships
to ensure proper tracking and management of daily and family expenses.
This approach helps in efficient monitoring and recording of expenses with a structured
database and automated processes.