

# FAMILY EXPENSES

**Team Id: NM2025TMID18889**

**Team Size: 4**

Team Leader: ABINAYA.P

Member 1: AMRIN NISHA.G.A

Member 2: ANOUSHKA.N

Member 3: ARTHI.A

## **Problem statement:**

The project aims to develop the comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses effectively. It will include features such as expenses 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 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:**

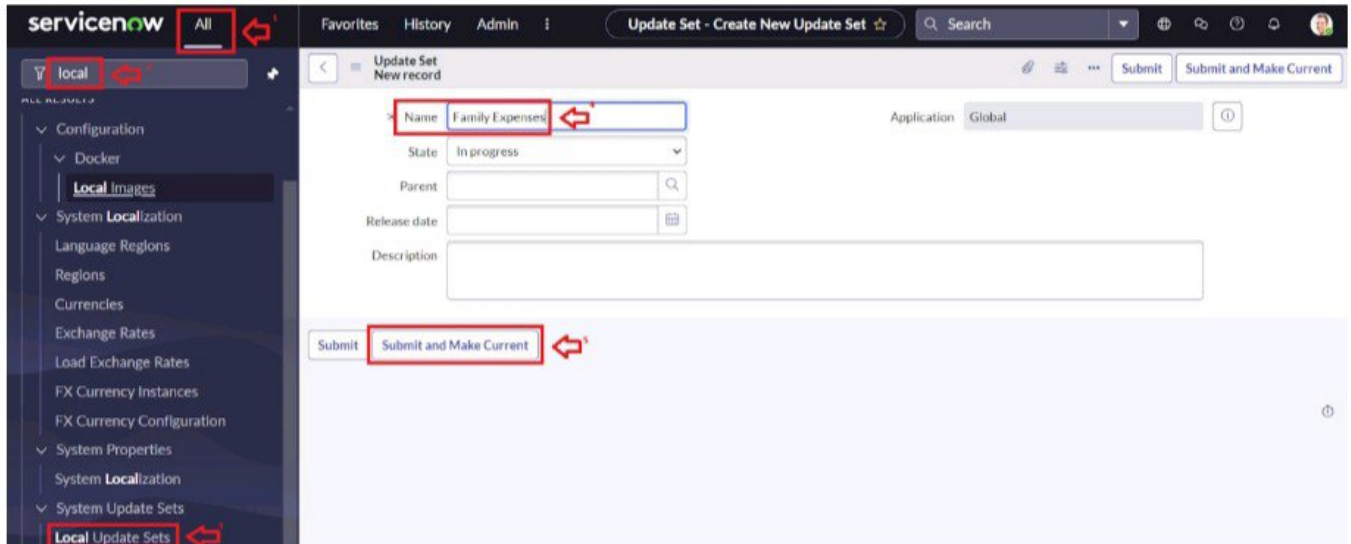
The “family expensive project” phrase seems to be a misunderstanding, but if referring to ServiceNow's Strategic Portfolio Management (SPM), also known as Project Portfolio Management(PPM), its objective is to strategically manage and optimize a portfolio of projects by aligning them with business goals,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

**Skills:** Service now family expense IOT Open Hardware platforms,  
Data structures

## **TASK INITIATION**

Milestone 1: Update set

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.

\* Label

\* Name

Application  ⓘ

Remote Table ☒

Create module ☒

Create mobile module ☒

Add module to menu

New menu name

Columns Controls Application Access

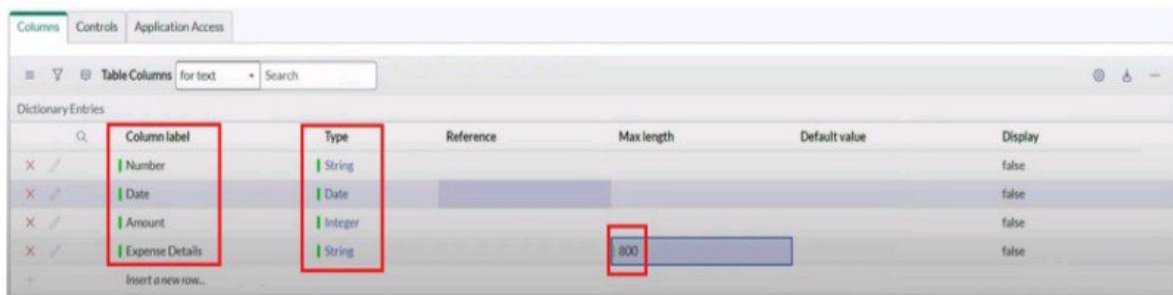
Table Columns   ⓘ

Dictionary Entries

	Column label ▼	Type	Reference	Max length	Default value	Display
✕ ✎	Number	String				false
✕ ✎	Date	Date				false
✕ ✎	Amount	Integer				false

## 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
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



Dictionary Entries	Column label	Type	Reference	Max length	Default value	Display
X /	Number	String				false
X /	Date	Date				false
X /	Amount	Integer				false
X /	Expense Details	String		800		false

### 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.



Choice List Specification | Calculated Value | **Default Value**

The **Default value** specifies what value the field has when first displayed.

☒ Use dynamic default

Dynamic default value: Get Next Padded Number

Delete Column | **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.

< Number MFE Update Delete

\* Table: **Family Expenses** Q i

Prefix: **MFE**

\* Number: 1,000

Application: Global i

Number of digits: 7

Update Delete

#### ACTIVITY 4: 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.

**Family Expenses [u\_family\_expenses]** 2 Column + -

Number ⚙ ✖ Date ⚙ ✖

Amount ⚙ ✖

---

1 Column + -

Expense Details ⚙ ✖

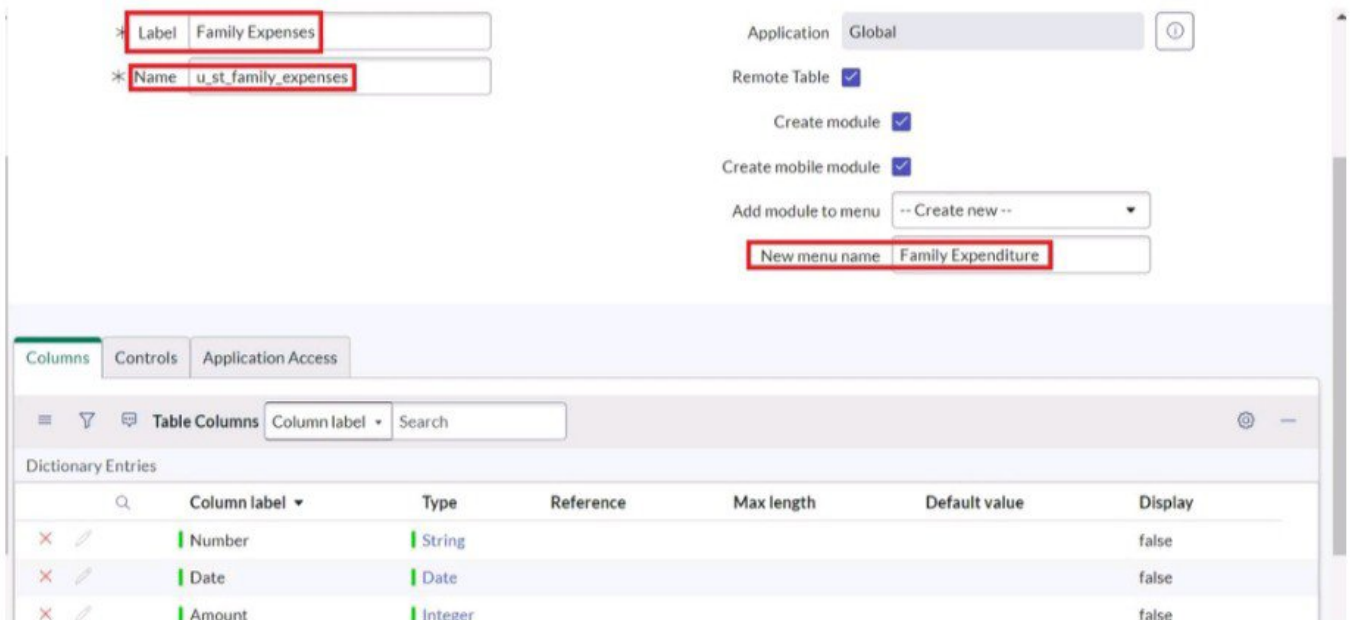
5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.



## Milestone 3: CREATION OF TABLE(DAILY EXPENSES)

### Activity 1: Creation of Daily Exepenses 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.



The screenshot shows the 'Table Columns' configuration page. At the top, there are input fields for 'Label' (Family Expenses) and 'Name' (u\_st\_family\_expenses), both highlighted with red boxes. To the right, there are checkboxes for 'Remote Table', 'Create module', and 'Create mobile module', all of which are checked. Below these, there is a dropdown menu for 'Add module to menu' set to '-- Create new --', and a 'New menu name' field set to 'Family Expenditure', also highlighted with a red box. The bottom section, titled 'Table Columns', contains a table with three columns: 'Column label', 'Type', and 'Display'. The table lists three entries: 'Number' (String), 'Date' (Date), and 'Amount' (Integer). Each entry has a red 'X' icon in the first column and a green checkmark in the 'Display' column.

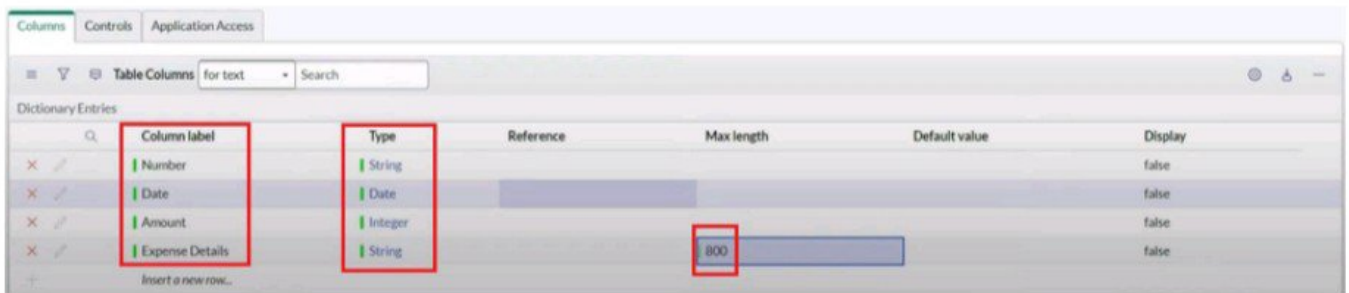
Column label	Type	Display
Number	String	false
Date	Date	false
Amount	Integer	false

### Activity 2: Creation of columns(Field)

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



Column label	Type	Reference	Max length	Default value	Display
Number	String				false
Date	Date				false
Amount	Integer				false
Expense Details	String		800		false

### Activity 3: 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.



Choice List Specification   Calculated Value   **Default Value** 

The **Default value** specifies what value the field has when first displayed.

**Use dynamic default** ☒ 

Dynamic default value:  

Delete Column   **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

< ≡ Number New record     **Submit**

\* Table:  

Prefix:  

\* Number:

Application:  

Number of digits:

**Submit** 

8. Click on Submit.

## ACTIVITY 4: Config 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.

## Milestone 4: CREATION OF RELATIONSHIP

### Activity 1: 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.

6. Fill the following details to create a new ACL
7. Scroll down under requires role
8. Double click on insert a new row
9. Give task table and team member role
10. Click on submit
11. Similarly create 4 acl for the following fields



servicenow All Favorites History Workspaces Relationship - Daily Expenses

Name Daily Expenses

Advanced

Applies to table: Family Expenses [u\_family\_expenses]

Queries from table: Daily Expenses [u\_daily\_expenses]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see the [documentation](#). See also the article about the recommended form of the script.

Query with Turn on ECMAScript 2021 (ES12) mode

```
1 (function refineQuery(current, parent) {
2
3 // Add your code here, such as current.addQuery(field, value);
4 current.addQuery('u_date', parent.u_date);
5 current.query();
6
7 })(current, parent);
```

Update Delete

Related Links

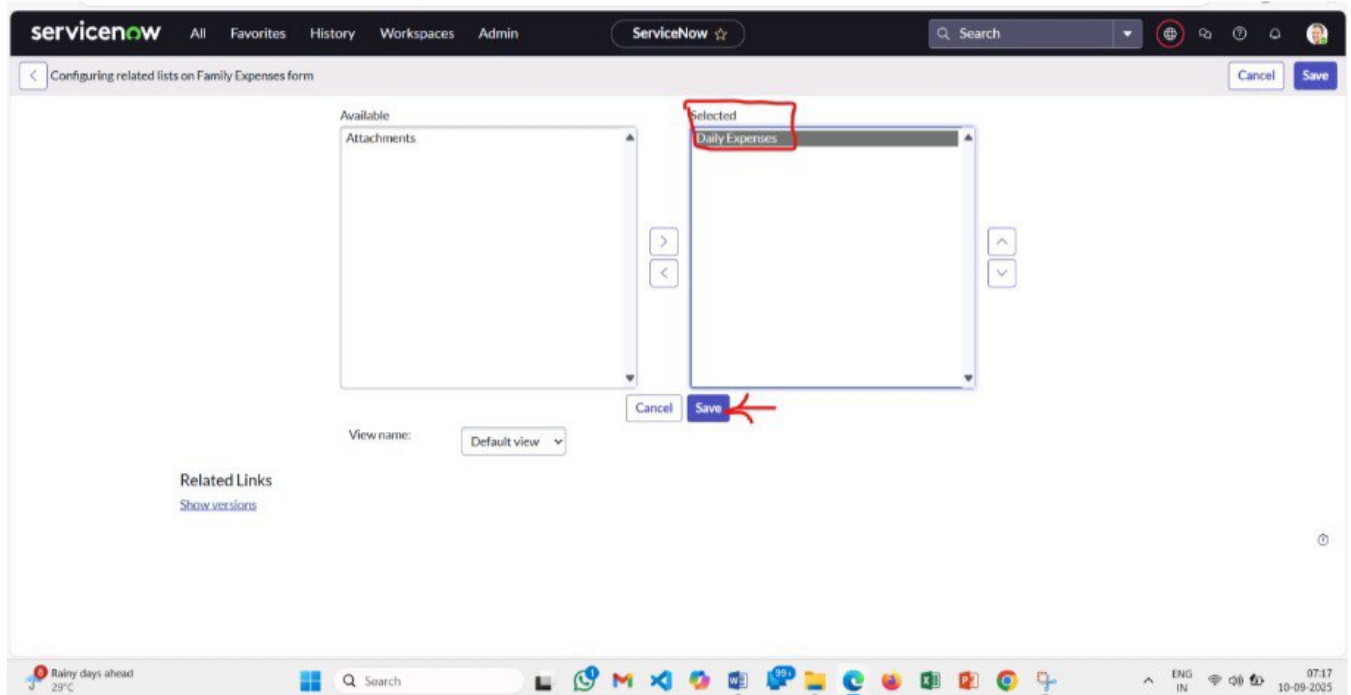
[Run Point Scan](#)

Response time: 4502, Network: 8, Server: 2941, Browser: 1553

## Milestone 5: Configuring Related List on Family Expenses

### Activity 1: Create a Flow to Assign operations ticket to group

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 Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save



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< Configuring related lists on Family Expenses form Cancel Save

Available Attachments

Selected Daily Expenses

View name: Default view

Related Links  
[Show versions](#)

## Milestone 6: Creation of Business Rules

### Activity1: 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



Business Rule  
New record

Business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automatically change values in form fields when the specified conditions are met.

Name: Family Expenses BR

Table: Daily Expenses [u\_daily\_expenses]

Application: Global

Active ☒

Advanced ☒

#### 4. In when to run Check Insert and Update

When to run Advanced

Specify whether the business rule should run on **Insert** or **Update**. Use **Filter Conditions** to specify under which conditions.

When: before

Order: 100

Insert ☒

Update ☒

Delete ☐

Query ☐

Filter Conditions:

-- choose field -- -- oper -- -- value --

Role conditions

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

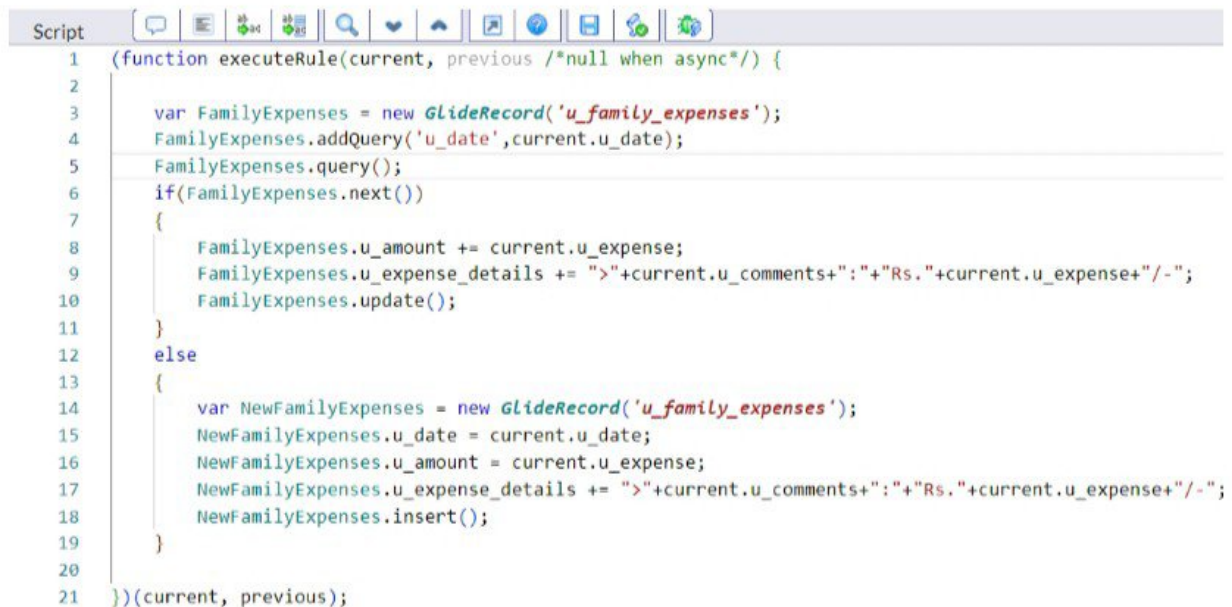
```
(function execute Rule (current, previous /*null when async*/) {  
  
  var Family Expenses = new Glide Record ('u_family_expenses ');  
  Family Expense. Add Query('u_date',current.u _date);  
  Family Expenses. query();  
  If (Family Expenses. next())  
  {  
    Family Expenses .u _amount += current .u _expense;  
  }  
}
```

```

Family Expenses .u_expense_details += ">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
";
Family Expenses. update();
}
else
{
var New Family Expenses = new Glide Record('u_family_expenses');
New Family Expenses. u_date = current. u_date;
New Family Expenses. u_amount = current. u_expense;
New Family Expenses .u_expense_details +=
">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
";
New Family Expenses. 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         ";
11         FamilyExpenses.update();
12     }
13     else
14     {
15         var NewFamilyExpenses = new GlideRecord('u_family_expenses');
16         NewFamilyExpenses.u_date = current.u_date;
17         NewFamilyExpenses.u_amount = current.u_expense;
18         NewFamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
19         ";
20         NewFamilyExpenses.insert();
21     }
22 })(current, previous);

```

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

## Milestone 7: Configure the Relationship

### Activity1: Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.



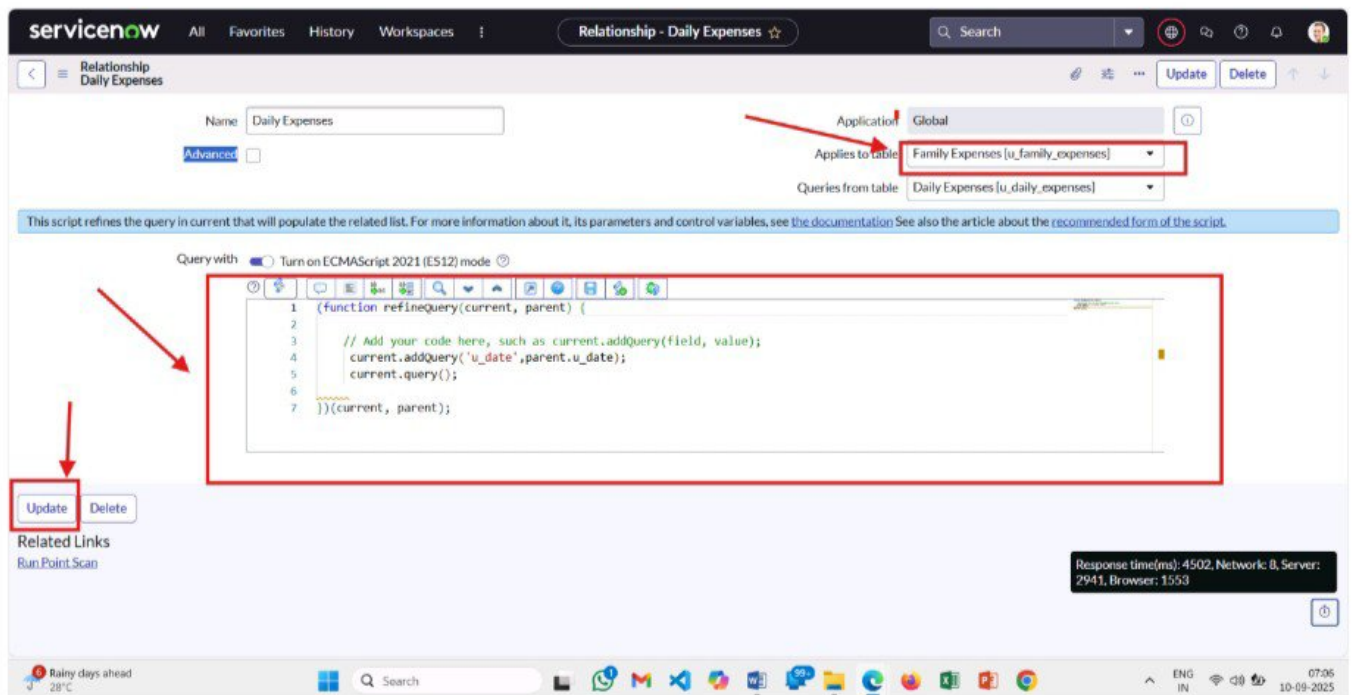
3. For Applies to table: Select Family Expenses.
4. In Query with: write the below Query.

```
(function refine Query (current, parent) {
```

```
// Add your code here, such as current. add Query (field, value);
current. add Query ('u_ date', parent. u_ date);
current. Query ();
```

```
})(current, parent);
```

5. Click on Update.



servicenow All Favorites History Workspaces Relationship - Daily Expenses

Name: Daily Expenses

Applies to table: Family Expenses [u\_family\_expenses]

Queries from table: Daily Expenses [u\_daily\_expenses]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see the [documentation](#). See also the article about the [recommended form of the script](#).

Query with Turn on ECMAScript 2021 (ES12) mode

```

1 (function refinequery(current, parent) {
2
3   // Add your code here, such as current.addQuery(field, value);
4   current.addQuery('u_date',parent.u_date);
5   current.query();
6
7 })(current, parent);

```

Update Delete

Related Links  
Run Point Scan

Response time(ms): 4502, Network: 8, Server: 2941, Browser: 1553

Rainy days ahead 28°C

Search

ENG IN 07:06 10-09-2025

**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.