LATHAMATHAVAN ENGINEERING COLLEGE

(Approved by AICTE, New Delhi and Affiliated to Anna University, Chennai) (Recognized under section 2(f) of the UGC Act 1956) M Latha Mathavan Nagar, Kidaripatti (P.O), Alagar Kovil Via, Melur (TK), Madurai-625 301

Subject Name : ServiceNow Administrator (NM1051)

(Under Naan Mudhalvan Scheme)

Project Title : Calculating Family Expenses using ServiceNow

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Calculating Family Expenses using ServiceNow

1. Objective

The main objective of this project is to **develop a family expense management system** using the **ServiceNow platform**. The system helps users efficiently track, categorize, and manage family expenses. It aims to promote financial awareness and better budgeting within the household.

2. Introduction

In today's fast-paced world, managing family expenses is a critical part of financial stability. Manual tracking often leads to confusion, errors, and lack of insight into spending patterns.
This project leverages **ServiceNow**, a robust cloud-based platform, to create an automated and user-friendly **Family Expense Tracker**.
The application allows users to record expenses, set budgets, categorize spending, and generate real-time reports.

By building this project, we demonstrate how ServiceNow can be extended beyond IT service management to real- world, practical use cases like family budgeting.

3. Project Scope

- Expense Categorization
- Budget Setting and Comparison
- Real-time Expense Tracking

5. Tools and Technologies Used

Tool/Technology	**Description**
ServiceNow	Cloud platform for workflow automation
Update Sets	To capture and move customizations
Tables & Fields	Used to store expense records
Forms & Lists	For user interaction and record display
Reports Module	For data visualization and analytics
Browser	Any modern browser (Chrome/Edge)

6. System Requirements

Hardware Requirements

- Processor: Dual Core or higher
- RAM: Minimum 4 GB
- Internet Connection: Stable broadband

Software Requirements

- Web Browser (Google Chrome preferred)
- ServiceNow Developer Instance
- ServiceNow Account (developer.servicenow.com)

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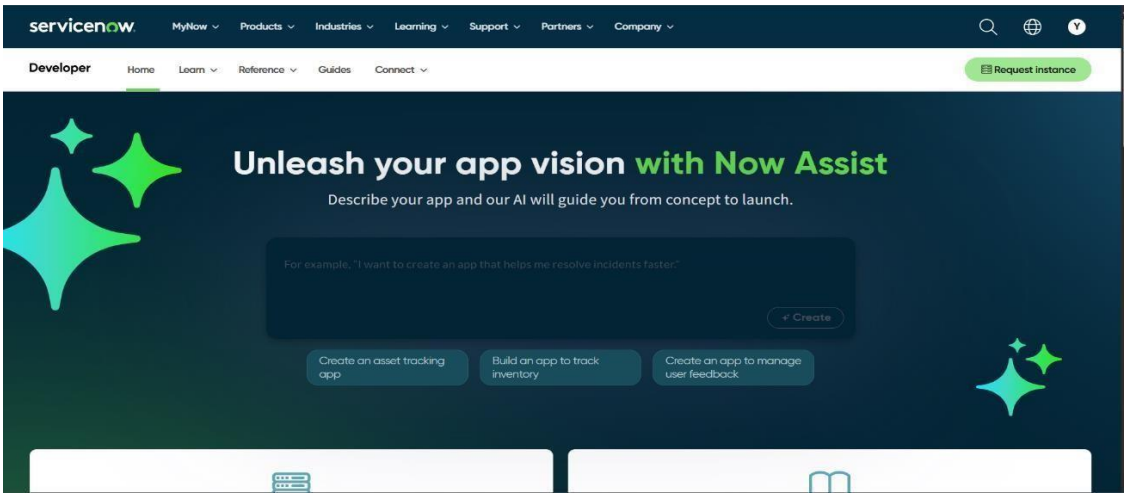
7. Project Implementation Steps

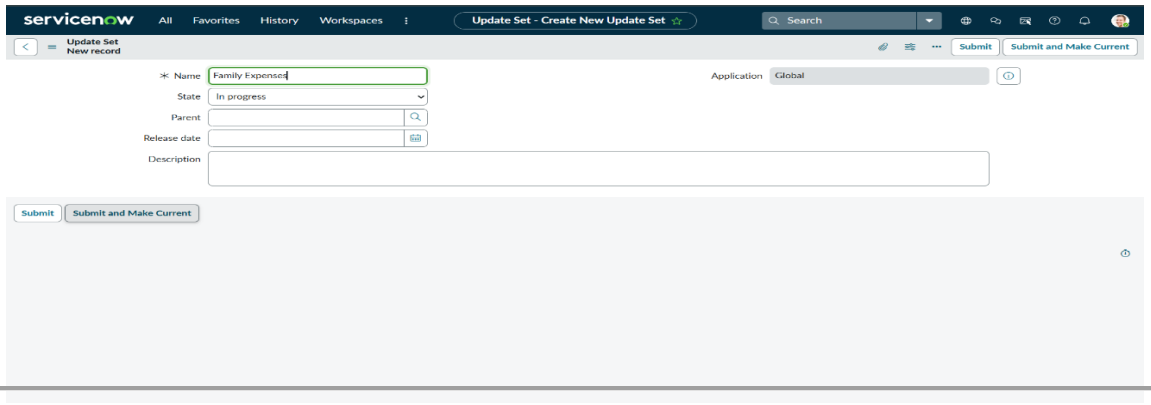
Step 1: Setting up ServiceNow Instance

1. Visit https://developer.servicenow.com
2. Sign up for a free developer account.
3. Log in to your instance to start customizing.



Step 2: Creation of a New Update Set

1. Navigate to **All → Local Update Sets → New**
2. Enter details:
    - **Name:** Family Expenses
3. Click **Submit and Make Current**
   This ensures all future configurations are captured under the same update set.



Step 3: Creation of Family Expenses Table

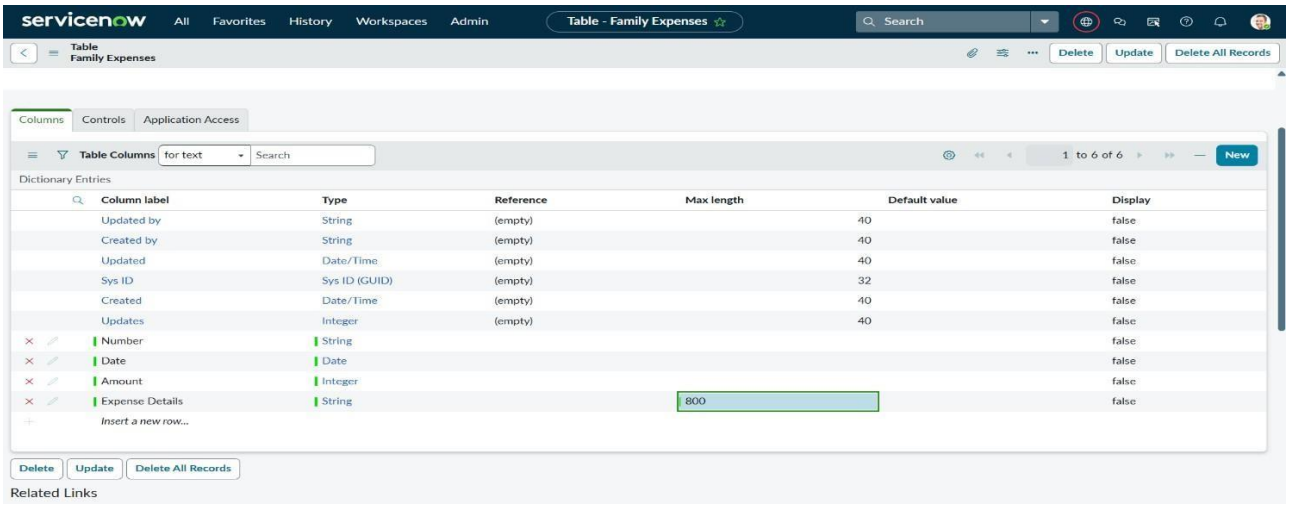
1. Navigate to **All → Tables → New**
2. Enter details:
    - **Label:** Family Expenses
    - **Name:** (Auto-populated)
    - **New menu name:** Family Expenditure
3. Right-click the header and select **Save**.

Step 4: Creation of Columns (Fields)

In the **Columns** section, add the following fields:

Column Label	**Type**	Max Length
Number	*String*	0
Date	*Date*	0
Amount	*Integer*	0
Expense Details	*String*	800

After adding all fields, **Save** the table.



Step 5: Auto-Number for Family Expenses

Open the **Number** field → **Advanced View** → enable **Use dynamic default** with **Get Next Padded Number** → Update.
Then go to **Number Maintenance → New**, set **Table: Family Expenses**, **Prefix: MFE**, and click **Submit**.

Step 6: Configure Family Expenses Form

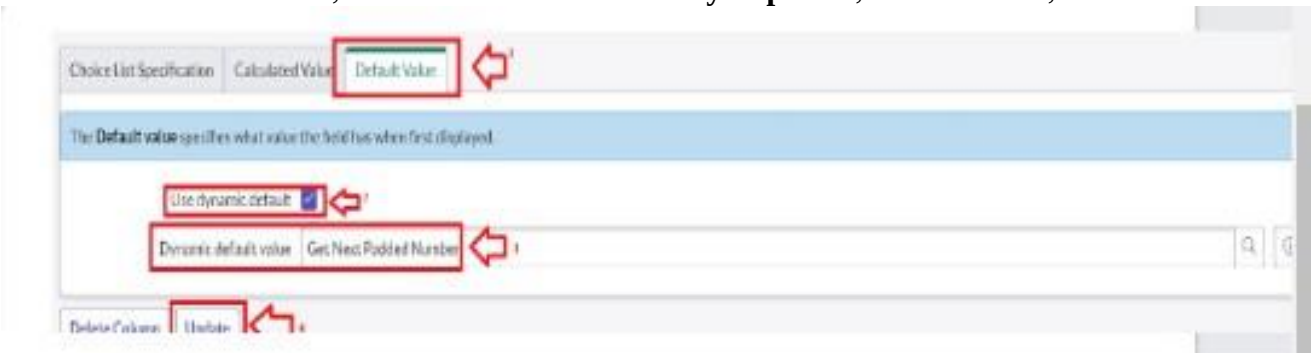
Go to **Family Expenses → New → Configure → Form Design**.
Make **Number** read-only, and set **Date** & **Amount** as mandatory → Save.

Step 7: Create Daily Expenses Table

Navigate to **Tables → New**, name it **Daily Expenses**, and link to **Family Expenditure**. Add fields: **Number, Date, Expense, Family Member Name, Comments**, then Save.

Step 8: Auto-Number for Daily Expenses

Open **Number** field → enable **Get Next Padded Number** → Update.
In **Number Maintenance**, create new with **Table: Daily Expenses**, **Prefix: MDE**, then Submit.

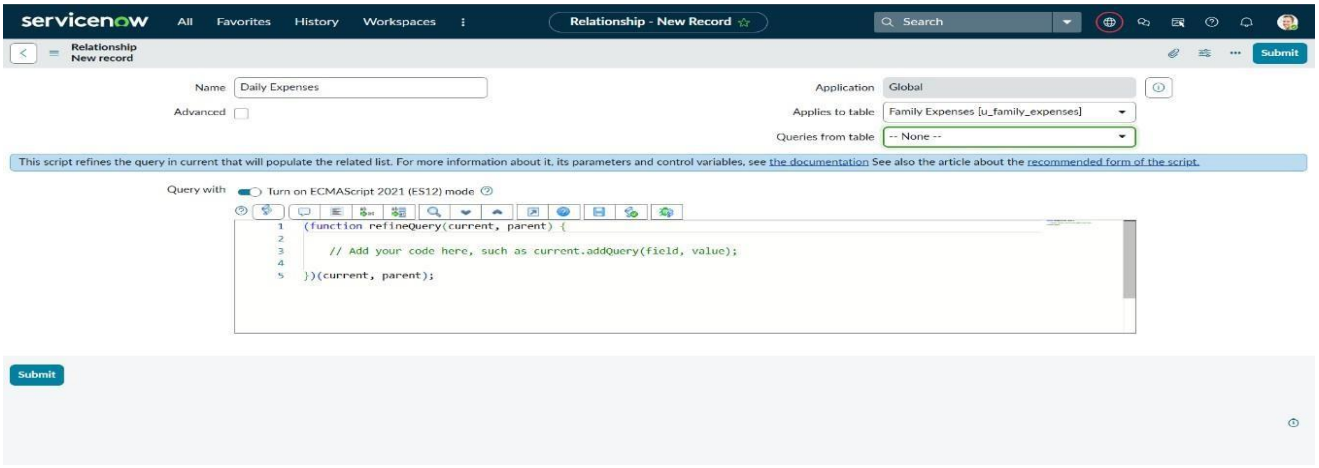


Step 9: Configure Daily Expenses Form

Go to **Daily Expenses → New → Configure → Form Design**.
Set **Number** read-only, and **Date & Family Member Name** mandatory → Save.

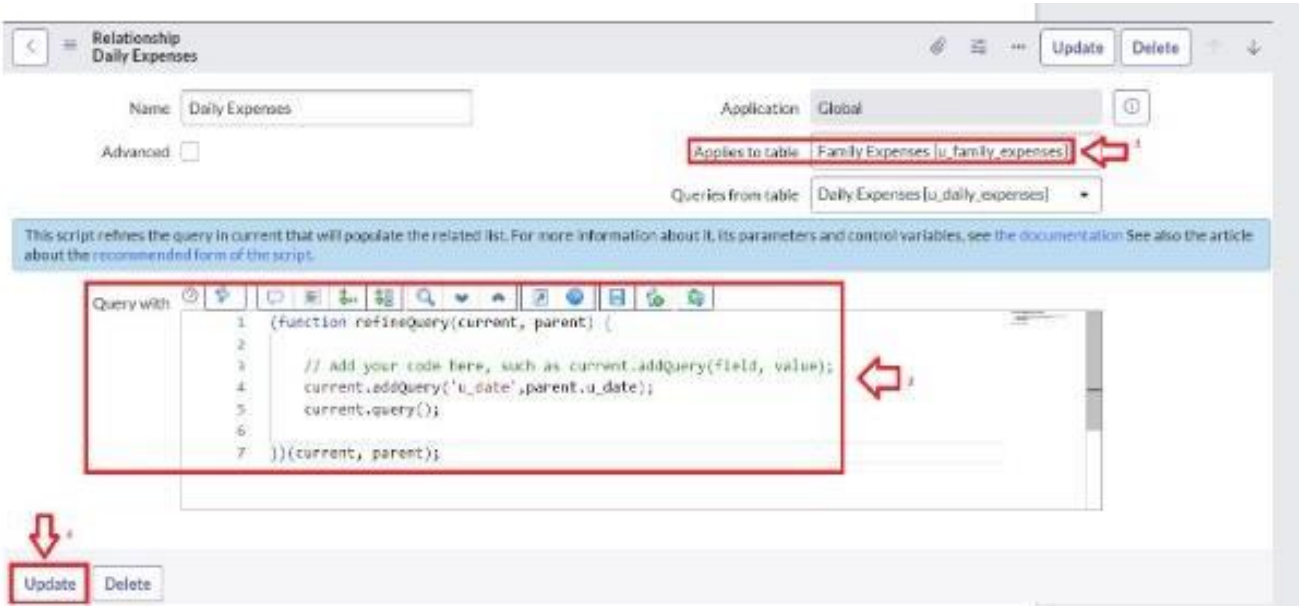
Step 10: Create Relationship

Open **Relationships → New**, set **Name: Daily Expenses**, **Applies to Table: Family Expenses**, and link to **Daily Expenses** → Save.
Add **Daily Expenses** as a related list in **Family Expenses** → Save.



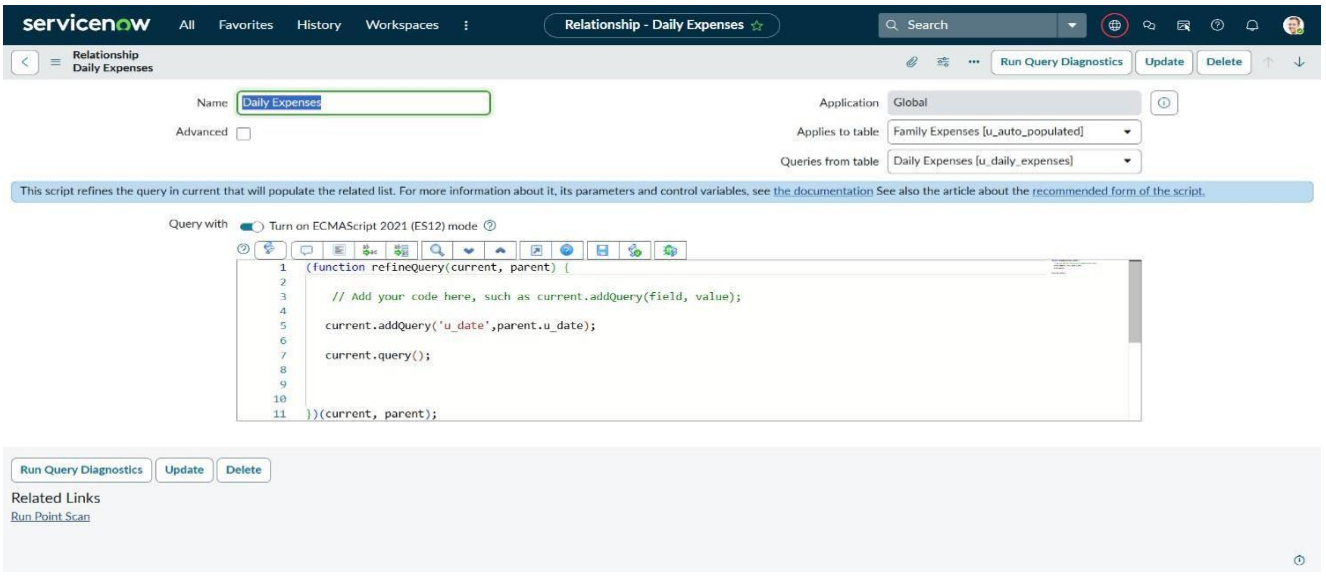
Step 11: Create Business Rule

Go to **Business Rules → New**, name it **Family Expenses BR**, and select **Table: Daily Expenses**. Enable **Advanced, Insert, Update** and add script to auto-update Family Expenses totals → Save.



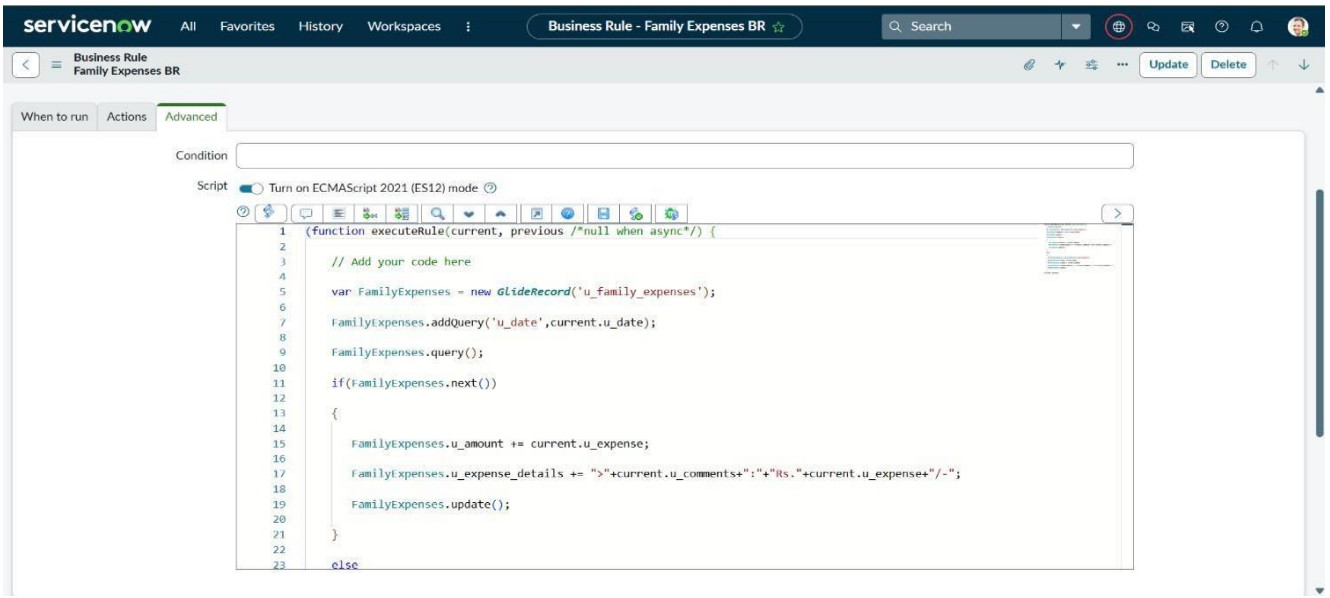
Step 12: Refine Relationship Query

Open **Daily Expenses Relationship**, set **Applies to: Family Expenses**. Add query script to match **u_date** fields between tables → Update.



Step 13: Testing & Output

Add test entries in **Daily Expenses** and verify automatic updates in **Family Expenses**. Check related lists, totals, and generate date-wise or member-wise reports.



Conclusion

A complete ServiceNow-based expense tracker with automated calculations, dynamic relationships, and real-time reporting — demonstrating workflow automation for practical financial management.