

# M.A.M COLLEGE OF ENGINEERING

**PROJECT NAME : CALCULATING FAMILY EXPENSES USING SERVICE NOW**

**TEAM MEMBERS :**

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## OBJECTIVES:

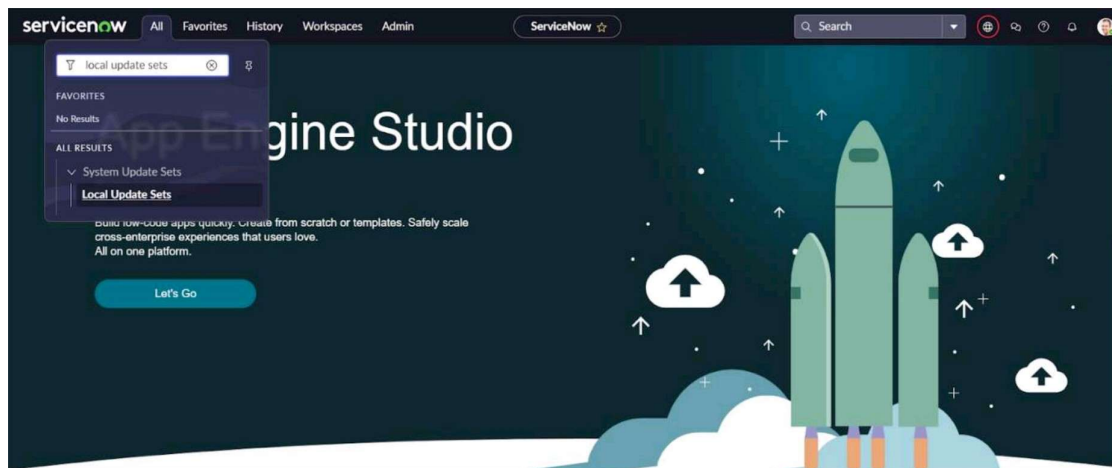
The project aims to develop a comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses efficiently. It will include features such as expense categorization, budget setting, real-time tracking, and reporting capabilities. Utilizing ServiceNow's 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.

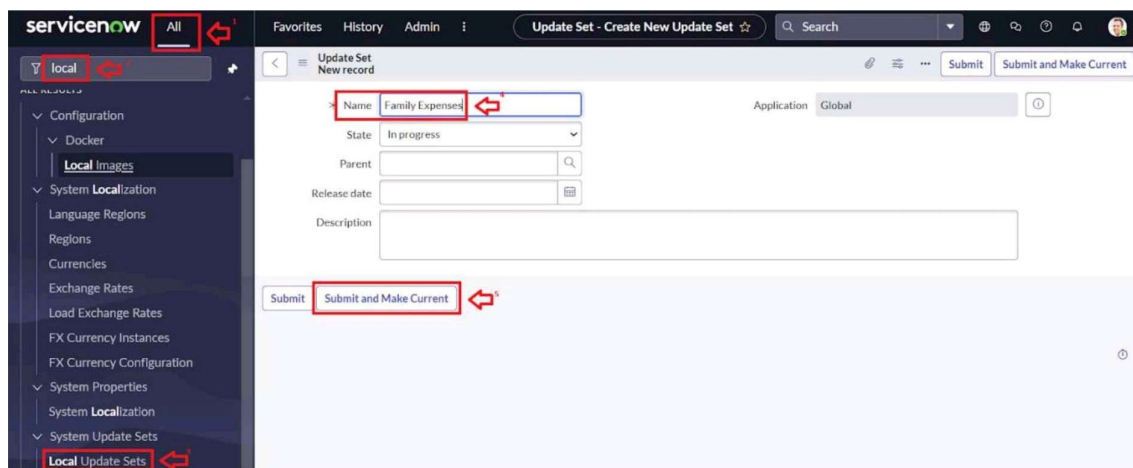


Go Further

Enter the Details as:

Name : Family Expenses

Then click on Submit and Make current



## 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

Application Global

Label Family Expenses

Create module

Name u\_st\_family\_expenses

Remote Table

Create mobile module ☒







Add module to menu -- Create new --

New menu name Family Expenditure

Columns Controls Application Access

Table Columns Column label Search

Dictionary Entries

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

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:

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
<input checked="" type="checkbox"/>	Number	String				false
<input checked="" type="checkbox"/>	Date	Date				false
<input checked="" type="checkbox"/>	Amount	Integer				false
<input checked="" type="checkbox"/>	Expense Details	String		800		false

9. Co 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

3.1n 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

Number Maintenance

Table : Family Expenses

Prefix : MFE

Number

Application Global

Numberofdigits 7

Update Delete

8. 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.

Family Expenses [u_family_expenses]		2 Column v
Number	Date	
	Amount	
		1 Column v
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.

## 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. Co 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: 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.

## 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.

4. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance

5. Click on New.

6. 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 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: Go to All >> In the filter search for Business Rules.
4. Under System Definition Select Business Rules then click on New.
5. Enter the Details:  
 Name : Daily Expenses  
 Applies to table : Select Family Expenses  
 Daily Expenses : Select Daily Expenses  
 6. Click Save.

## Configuring Related List on Family Expenses

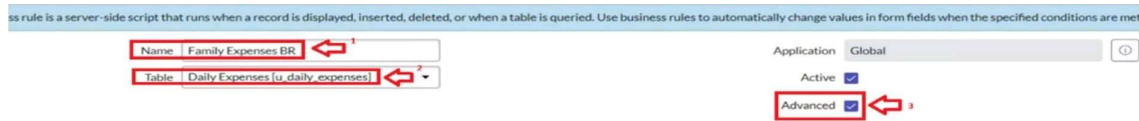
1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save



## 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



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(lu_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();

    l) (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.