Family Expenses Project Documentation

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

FAMILY EXPENSES

Team Id: NM2025TMID20228

Team Members: 3

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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

## Steps:

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

## Steps:

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)

## Steps:

1. Near Columns Double click near insert a new row.

2. Column label: Number, Type: String

3. Column label: Date, Type: Date

4. Column label: Amount, Type: Integer

5. Column label: Expense Details, Type: String, Max length: 800

### Activity 3: Making Number Field an Auto-Number

## Steps:

1. Double click on the Number Field/Column.

2. Enable Advanced view and configure Get Next Padded Number.

3. Configure Number Maintenance with Prefix: MFE.

### Activity 4: Configure the Form

## Steps:

1. Open Family Expenses Form

2. Customize using Form Design

3. Make Number Read-Only, Date & Amount Mandatory

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

Steps: Create Daily Expenses table with Number, Date, Expense, Family Member Name (Reference), Comments.

## Milestone 4: CREATION OF RELATIONSHIP

Steps: Create relationship between Family Expenses and Daily Expenses tables.

## Milestone 5: Configuring Related List on Family Expenses

Steps: Add Daily Expenses to Related Lists.

## Milestone 6: Creation of Business Rules

Steps: Write GlideRecord script to update Family Expenses when Daily Expenses are inserted/updated.

## Milestone 7: Configure the Relationship

Steps: Refine Query to match Family Expenses date with Daily Expenses date.

Conclusion: A successful ServiceNow "family" project is concluded by demonstrating tangible business value through strategic alignment, improved operational efficiency, and positive user satisfaction.