

AUTOMATICALLY POPULATE THE TRAINER FIELDS IN THE "PROGRAM" TABLE BASED ON THE SELECTED TECHNOLOGY AND TRACKER

TEAM MEMBERS

LOBIA A (TEAM LEADER)

DRAVIDAR SELVI T

KOUSIKA S

DHANASRI V

Implementation

Step 1 : Creating Custom Table

1. Open “Tables” >> New.
2. Give the label name as “ program ”.
3. Click on Submit.

Table New record

ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: Program

* Name: u_program

Extends table:

Application: Global

Create module: ☐

Create mobile module: ☐

Add module to menu: -- Create new --

New menu name: Program

Columns Controls Application Access

Table Columns for text Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Insert a new row...					

Submit Cancel

- Click on new to open record, click on the Additional Actions and go to configure >> select Form Layout.

Program ee

Save

Configure >

Export >

Create Favorite

Copy URL

Copy sys_id

Reload form

Form Design

Form Layout

Related Lists

All

Table

Security Rules

Business Rules

Client Scripts

UI Policies

Data Policies

UI Actions

Notifications

Dictionary

Create fields as

- Name : Technology
- Type : choice

Click on Add

And follow the same instructions
For two more fields are

- a. Tracker
- b. Trainer
1. Add them and click on save.

The screenshot shows a 'New record' form for a 'program'. At the top, there is a header bar with a back arrow, a menu icon, the text 'program New record', and a 'Submit' button. Below the header, there are three dropdown menus labeled 'technology', 'tracker', and 'tranier', each with '-- None --' selected. At the bottom left, there is a 'Submit' button.

Now right click on “ technology ” field click on Configure Choices.

10. Enter the item as “ Salesforce ” and click on Add.
11. Add two more items
 - a. ServiceNow
 - b. Testing
12. Click on save.

The screenshot shows the 'Configuring technology Choices' dialog. At the top, there is a header bar with a back arrow and the text 'Configuring technology Choices'. Below the header, there is a section titled 'Tailoring: u.program.u_technology' with a sub-section 'program'. The main area is divided into two panes: 'Available' on the left and 'Selected' on the right. The 'Available' pane is empty. The 'Selected' pane contains three items: 'salesforce', 'serviceNow', and 'testing'. Between the panes, there are 'Add' and 'Remove' buttons. To the right of the 'Selected' pane, there are 'Move up' and 'Move down' buttons. At the bottom, there are 'Save' and 'Cancel' buttons. Below the dialog, there is a text input field labeled 'Enter new item:' and an 'Add' button.

14. Follow the same steps from 9 to 13 for remaining two fields.
15. Tracker values are:
 - a. Admin
 - b. Developer
16. Trainer values are:
 - . Rakesh
 - a. Tarakesh
 - b. Ajay
 - c. Phani
 - d. Shivam
17. Click on save.

Step 2 : Creating a custom matcher table.

1. Open “Tables” >> New.
2. Give the label name as “ testing lookup ”.
3. Add “ Matcher Field Definition ” in the Extends table field.
4. Click on Submit.

The screenshot shows the 'New record' form for a custom matcher table in ServiceNow. The form is titled 'Table Newrecord' and includes a 'Submit' button and a 'Cancel' button. A yellow banner at the top states: 'ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).' Below this, a blue box explains: 'A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)'.

The form fields are as follows:

- * Label:
- * Name:
- Extends table: (with a search icon and an info icon)
- Application: (with an info icon)
- Create module: ☒
- Create mobile module: ☒
- Add module to menu: (dropdown menu)
- New menu name:

Below the form fields, there are three tabs: 'Columns', 'Controls', and 'Application Access'. The 'Columns' tab is selected, showing a 'Table Columns' section with a search bar and a 'Dictionary Entries' table.

Column label	Type	Reference	Max length	Default value	Display
+ Insert a new row...					

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

5. Follow the same steps from 4 to 17 from “ step - 1 ”.
6. And add another field from the Form Layout that is “ order ”.
7. Click on save.

Step 3 : Create records in matcher table

1. Follow the below figure to create a record.

testinglookup
New record

technology Order

tracker

tranier

Submit

2. Follow the figure to create more records as shown in below figure.

technology	tracker	tranier	Active	Order
salesforce	admin	rakesh	true	100
salesforce	developer	tarakesh	true	200
serviceNow	admin	ajay	true	300
serviceNow	developer	shivam	true	400
testing	admin	shivam	true	500
testing	developer	shivam	true	600

Step 4 : Create Data Lookup Definition to automate the trainer

1. Search for Data Lookup Definition in All navigation.
2. Click on new.
3. Give name as “ program data lookup ”
4. Select the source table as “ program ”.
5. Select the matcher table as “ testing lookup ”.
6. Click on submit.

< ≡ Data Lookup Definitions
New record

* Name

* Source Table

* Matcher Table

Application

Active ☒

Run on form change ☒

Run on insert ☒

Run on update ☐

Submit

7. Again open the “ program data lookup ” record.
8. Scroll down under matcher field definitions and click on new.
9. Select the source table field : technology
10. And select the matcher table field : technology
11. Exact lookup match : checked.
12. Click on Submit.

< ≡ Matcher Field Definitions
New record

Data Lookup

* Source table field

* Matcher table field

Application

Exact lookup match ☒

Submit

13. And create another Matcher field definitions for another field : tracker
14. Click on Setter field definition and click on new
15. Select the source table field : tranier
16. And select the matcher table field : tranier
17. Always replace the field : checked.
18. Click on Submit.

< ≡ Setter Field Definitions
New record

Data Lookup

* Source table field

* Matcher table field

Application

Always replace ☒

Submit

19. Click on update.

Data Lookup Definitions
program data lookup
Update Delete

* Name
program data lookup
Application
Global ⓘ

* Source Table
program [u_program]
Active
☒

* Matcher Table
testinglookup [u_testing]
Run on form change
☒

Run on insert
☒

Run on update
☐

Update Delete

Matcher Field Definitions (2)
Setter Field Definitions (1)

for text Search
ⓘ — Actions on selected rows... New

Data Lookup = program data lookup

<input type="checkbox"/>	Source table field	Matcher table field	Exact lookup match
<input type="checkbox"/>	u_tracker	u_tracker	false
<input type="checkbox"/>	u_technology	u_technology	true

1 to 2 of 2

Result

1. Go to the source table “ program ”.
2. Click on new .
3. Select any technology and tracker .
4. To check the trainer is automatically assigned to it.

program
New record
Submit

technology
serviceNow

tracker
admin

tranier
shivam

Submit