

## PROJECT REPORT -07 SETTING UP SERVICENOW INSTANCE

Date	02 july 2025
Team ID	LTVIP2025TMID30284
Project Name	EDUCATIONAL ORGANISATION USING SERVICENOW
Maximum Marks	4 Marks

### **GOAL:**

Build an **admission process** with stages like:

1. Application Submitted
2. Under Review
3. Decision Pending
4. Accepted or Rejected

---

### **1. Prepare the Table:** `u_admission_request`

Ensure the table has the necessary fields:

Field	Type	Description
applicant_name	String	Name of applicant
email	Email	Contact
program_applied	Choice	BSc, MSc, etc.
admission_term	Choice	Fall 2025, etc.
status	Choice	Submitted, Under Review, Pending Decision, Accepted, Rejected
admin_number	String	Generated from Number Maintenance

✓ Use **Choice List** for status.

---

## 2. Create Process Flow Formatter (PFF)

### ◆ Step-by-Step:

1. Go to:  
Process Automation > Process Flow Formatter
2. Click **New**
3. Fill in:  
| Field | Value |  
|-----|-----|  
| **Name** | Admission Request Flow |  
| **Table** | u\_admission\_request |  
| **Field** | status |  
| **Type** | Choice |
4. Define the stages:  
| Order | Label | Value |

```

|-----|-----|-----|
| 1 | Application Submitted | Submitted |
| 2 | Under Review | Under Review |
| 3 | Decision Pending | Pending Decision |
| 4 | Accepted | Accepted |
| 5 | Rejected | Rejected |
5. Submit

```

✅ This enables the **Process Flow Formatter UI** on the form (a visual bar showing current stage).

---

## 3. Create Flow with Flow Designer

### ◆ Step-by-Step:

1. Navigate to:  
Flow Designer > New Flow
2. Fill in:
  - Name: Admission Application Workflow
  - Table: u\_admission\_request
  - Trigger: When record is created or updated
3. Add Flow Logic:

### ⚙️ Example Flow:

Step	Trigger	Action
1	Record Created	Set status to "Submitted"
2	Wait for condition	Status = "Under Review"

Step	Trigger	Action
3	Notify reviewer	Send email to admissions team
4	Wait for status = "Pending Decision"	
5	Branch: Status → Accepted	Notify applicant of acceptance
6	Branch: Status → Rejected	Notify applicant of rejection

4. Publish the flow



## 4. Enable Process Flow UI on the Form

### Steps:

- Go to:  
System UI > Formatters (or use existing formatter)
- Ensure the **Process Flow Formatter** is added to your form
- Go to:
  - Table: `u_admission_request`
  - Click **Form Layout**
  - Add formatter: `Process Flow`

✅ You'll now see the **progress bar** on the form that tracks the current `status`.

---



## Example UI: What the Admission Form Looks Like

```
yaml
CopyEdit
[Process Flow Bar]
```

Submitted → Under Review → Pending Decision → Accepted/Rejected

[Form Fields]

Applicant Name: John Doe

Program Applied: MSc

Admission Term: Fall 2025

Status: Under Review

Comments: "Transcript under review"

---



## BONUS: Track Progress with Reports

Use the `status` field to build charts like:

- Applications by Status
  - Acceptance Rate by Program
  - Time-to-decision by reviewer
- 



## Summary

Task	Tool
Table & Fields	Table Designer
Visual Process Flow	Process Flow Formatter
Automation	Flow Designer
Notifications	Flow Designer → Email
Numbering	Number Maintenance
Role/Access	ACLs