

**PROJECT REPORT -05
SETTING UP SERVICENOW INSTANCE**

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

 **GOAL: Create clean, well-structured Form Designs for:**

1. **Salesforce Table (Integration data)**
2. **Admission Table**
3. **Student Progress Table**

 **TOOL TO USE: Form Designer**

- Navigation:
Go to your table → Click **Form Design**
 - Drag & drop fields
 - Add sections, tabs, and split layouts
-

Salesforce Table Form Design (for Integration Data)

Table: `u_salesforce_sync_data`

Purpose: Store contact sync status, sync time, and error details from Salesforce

Fields to Include:

- Salesforce Record ID (String)
- Local Record (Reference to Student or Contact)
- Sync Direction (Choice: Push, Pull)
- Sync Status (Choice: Success, Failed, Pending)
- Last Sync Date (Date/Time)
- Error Message (String - multi-line)

Suggested Form Layout:

```
pgsql
CopyEdit
Section: Integration Info
-----
Salesforce Record ID
Local Record
Sync Direction

Section: Sync Status
-----
Sync Status
```

Last Sync Date
Error Message

- ✓ Add color indicators for "Failed" sync using UI Policies or form scripts

2 Admissions Table Form Design

Table: u_admission_request

Purpose: Capture new student admission applications

✚ Fields to Include:

- Applicant Name (String)
- Date of Birth (Date)
- Email (Email)
- Phone Number (Phone)
- Program Applied (Choice: BSc, MSc, etc.)
- Admission Term (Choice: Fall 2025, Spring 2026)
- Documents Submitted (True/False or Attachment)
- Application Status (Choice: Submitted, In Review, Approved, Rejected)
- Comments (String - multi-line)

🧱 Suggested Form Layout:

```
markdown
CopyEdit
Section: Applicant Information
-----
Applicant Name
Date of Birth
Email
```

Phone Number

Section: Application Details

Program Applied


Admission Term

Documents Submitted

Section: Review & Status

Application Status

Comments

 You can automate status changes using Flow Designer based on document submissions or review flags.

Student Progress Table Form Design

Table: u_student_progress

Purpose: Track academic performance for each student

Fields to Include:

- Student (Reference to u_student_record)
- Academic Year (String/Choice)
- Term (Choice)
- GPA (Decimal)
- Credits Earned (Integer)
- Total Credits (Integer)
- Completion % (Decimal or formula field)
- Status (Choice: In Progress, At Risk, Completed)
- Advisor Comments (String - multi-line)

Suggested Form Layout:

```
markdown
CopyEdit
Section: Student Details
-----
Student
Academic Year
Term

Section: Academic Progress
-----
GPA
Credits Earned
Total Credits
Completion %

Section: Status & Review
-----
Status
Advisor Comments
```

- ✅ Consider making GPA, Completion % **read-only** if they are calculated.
- 🟡 Use **UI Policies** to show “Advisor Comments” only if Status = “At Risk”

BONUS: Best Practices for Form Design

Tip	Benefit
Use sections to group related fields	Improves readability
Use 2-column layout for wide forms	Better use of space
Use tabs for large forms (e.g., Attachments, History)	Reduces scroll fatigue
Apply UI Policies to show/hide fields conditionally	Keeps form clean

Tip

Add **annotations/help text**

Enable **Form View Rules** (for dynamic views)

Benefit

Guide users during data entry

Customize based on role/user