PROJECT REPORT -05 SETTING UP SERVICENOW INSTANCE

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

Solution 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:

Last Sync Date Error Message



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

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.

3 Student Progress Table Form Design

Table: u student progress

Purpose: Track academic performance for each student

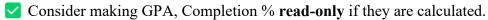
Fields to Include:

- 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:

Status

Advisor Comments



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

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