

# FAMILY EXPENSES

**Team Id:** NM2025TMID20260

**Team Members:** 4

**Team Leader:** PRAKASAM.M

**Member 1:** RAHUL ROBINSON.J

**Member 2:** SANTHOSH KUMAR.E

**Member 3:** SHAILESH.S

**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.

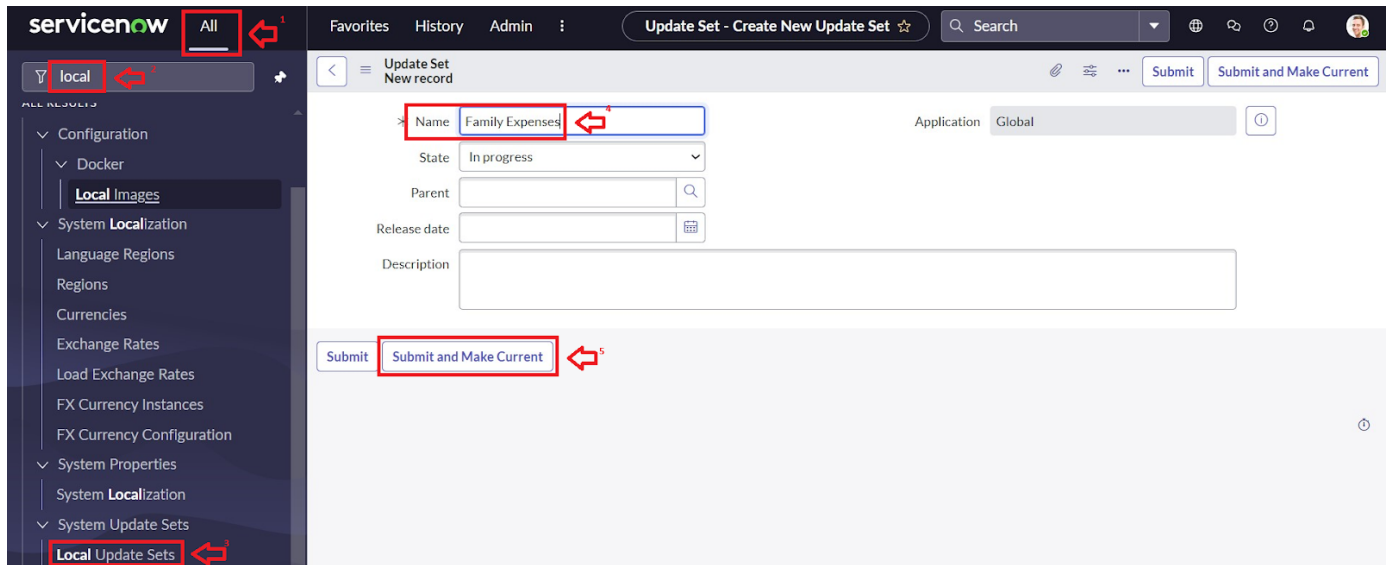
**Skills:** Service now Family expenses IOT Open Hardware platforms, Data Structures

## TASK INITIATION

**Milestone 1:** update set

**Activity 1:** Local update set

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.



The screenshot shows the ServiceNow 'Update Set - Create New Update Set' form. The sidebar on the left has 'Local Update Sets' highlighted. The main form fields are: Name (Family Expenses), State (In progress), Parent (empty), Release date (empty), and Description (empty). The Application is set to Global. At the bottom, the 'Submit and Make Current' button is highlighted.

## Milestone 2: CREATION OF TABLE

### Activity 1: TABLE

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.

\* Label

\* Name

Application  ⓘ

Remote Table ☒

Create module ☒

Create mobile module ☒

Add module to menu

New menu name

Columns Controls Application Access









Table Columns Column label Search ⓘ

Dictionary Entries

	Column label ▼	Type	Reference	Max length	Default value	Display
✕ ✎	Number	String				false
✕ ✎	Date	Date				false
✕ ✎	Amount	Integer				false

## Activity 2: Creation of Columns (Fields)

1. Near Columns Double click near insert a new row.
2. Give the details as:  
 Column label: Number  
 Type: String
3. Double click on insert a new row again
4. Give the details as:  
 Column label: Date  
 Type: Date
5. Double click on insert a new row again
6. Give the details as:  
 Column label: Amount  
 Type: Integer
7. Double click on insert a new row again
8. Give the details as:  
 Column label: Expense Details  
 Type: String  
 Max length: 800

Columns						
Table Columns for text						
Dictionary Entries						
	Column label	Type	Reference	Max length	Default value	Display
 	Number	String				false
 	Date	Date				false
 	Amount	Integer				false
 	Expense Details	String		800		false
Insert a new row...						

### ACTIVITY3: Making Number Field an Auto-Number

1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view
3. In Default Value:
  - Use dynamic default: check the box
  - Dynamic default value: Get Next Padded Number
4. Click on Update.

Choice List Specification
 Calculated Value
 **Default Value**

The Default value specifies what value the field has when first displayed.

Use dynamic default: ☒

Dynamic default value: Get Next Padded Number

Delete Column
 **Update**

- 5 Go to All>> In the filter search for Number Maintenance >> select Number Maintenance
6. Click on New.
7. Enter the below Details:
  - Table: Family Expenses
  - Prefix: MFE
- 8 Click on Submit.

<
≡
**Number MFE**
🔗
⚙️
⋮
Update
Delete

\* **Table** **Family Expenses** 🔍 ⓘ

**Prefix** **MFE**

\* **Number** 1,000

**Application** **Global** ⓘ

**Number of digits** 7

Update
Delete

### ACTIVITY 4: CONFIGURE THE FORM

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Form Design
4. Customize or Drag Drop the form as per your requirement.

**Family Expenses [u\_family\_expenses]**
2 Column
+
×

**Number**
⚙️
×

**Date**
⚙️
×

**Amount**
⚙️
×

**Expense Details**
⚙️
×

5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

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

### Activity 1: Creation of Daily Exepenses Table.

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details:  
 Label: Family Expenses  
 Name: Auto-Populated  
 New menu name: Family Expenditure
3. Go to the Header and right click there>> click on Save.

\* Label

\* Name

Application  ⓘ

Remote Table ☒

Create module ☒

Create mobile module ☒

Add module to menu

New menu name

Columns Controls Application Access

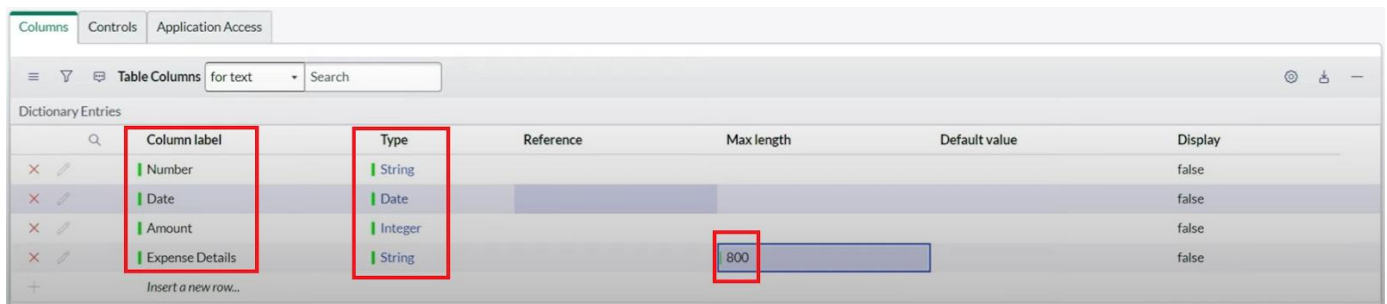
Table Columns   ⓘ

	Column label ▼	Type	Reference	Max length	Default value	Display
✕ ✎	Number	String				false
✕ ✎	Date	Date				false
✕ ✎	Amount	Integer				false

### Activity 2: Creation of columns(Field)

1. Near Columns Double click near insert a new row.
2. Give the details as:  
 Column label: Number  
 Type: String
3. Double click on insert a new row again
4. Give the details as:  
 Column label: Date  
 Type: Date

5. Double click on insert a new row again
6. Give the details as:  
     Column label: Expense  
     Type: Integer
7. Double click on insert a new row again
8. Give the details as:  
     Column label: Family Member Name  
     Type: Reference  
     Max length: 800
9. Double click on insert a new row again
10. Give the details as:  
     Column label: Comments  
     Type: String  
     Max length: 800
11. Go to the Header and right click there>> click on Save.




	Column label	Type	Reference	Max length	Default value	Display
	Number	String				false
	Date	Date				false
	Amount	Integer				false
	Expense Details	String		800		false


Insert a new row...




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


1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view
3. In Default Value:  
     Use dynamic default: check the box  
     Dynamic default value: Get Next Padded Number
4. Click on Update.

Choice List Specification   Calculated Value   **Default Value** 

The **Default value** specifies what value the field has when first displayed.

**Use dynamic default** ☒ 

Dynamic default value   Get Next Padded Number   

Delete Column   **Update** 

5.Go to All >> In the filter search for Number Maintenance >> select Number Maintenance


6.Click on New.

7.Enter the below Details:

Table: Family Expenses

Prefix: MFE

< ≡ Number  
New record     **Submit**

\* Table **Daily Expenses**   

Prefix **DFE** 

\* Number

Application Global 

Number of digits

**Submit** 

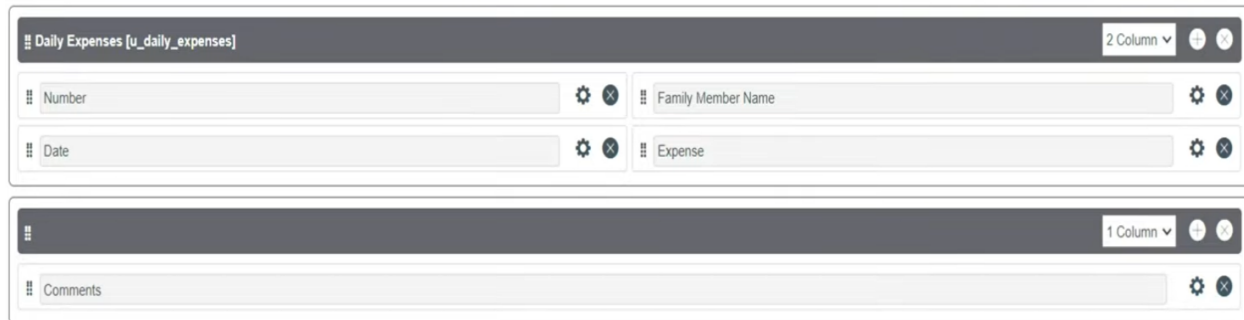
8.Click on Submit.

#### ACTIVITY4: Configr the form.

1. Go to All >> In the filter search for Daily Expenses >> Open Daily Expenses
2. Click on New



3. Go to the Header and right click there>> click on Configure >> Select Form Design
4. Customize or Drag Drop the form as per your requirement.

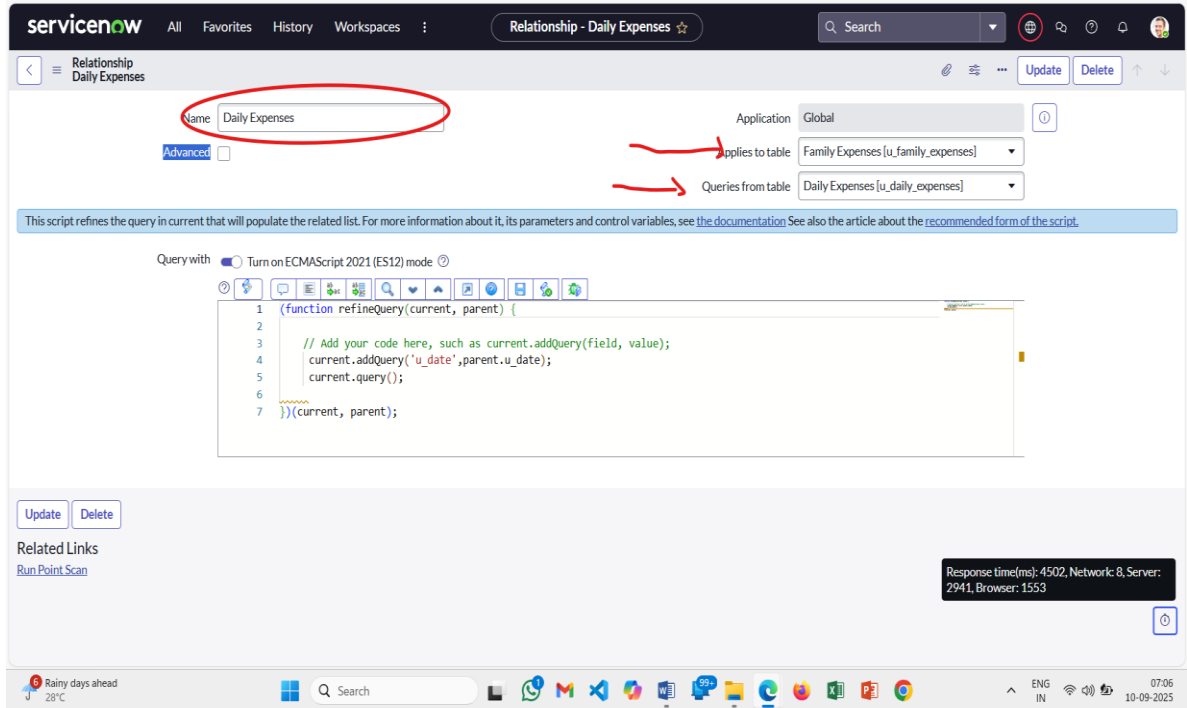


5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.

## Milestone 4: CREATION OF RELATIONSHIP

### Activity 1: Creation of Relationship between Family Expenses and Daily Expenses tables

1. Go to All >> In the filter search for Relationships >> Open Relationships
2. Click on New.
3. Enter the details:
  - Name: Daily Expenses
  - Applies to table: Select Family Expenses
  - Daily Expenses: Select Daily Expenses
4. Click Save.
6. Fill the following details to create a new ACL
7. Scroll down under requires role
8. Double click on insert a new row
9. Give task table and team member role
10. Click on submit
11. Similarly create 4 acl for the following fields



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Name: Daily Expenses

Advanced ☐

Applies to table: Family Expenses [u\_family\_expenses]

Queries from table: Daily Expenses [u\_daily\_expenses]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see [the documentation](#). See also the article about the [recommended form of the script](#).

Query with ☐ Turn on ECMAScript 2021 (ES12) mode

```

1 (function refineQuery(current, parent) {
2
3   // Add your code here, such as current.addQuery(field, value);
4   current.addQuery('u_date', parent.u_date);
5   current.query();
6
7 })(current, parent);
  
```

Update Delete

Related Links

[Run Point Scan](#)

Response time(ms): 4502, Network: 8, Server: 2941, Browser: 1553

Rainy days ahead 28°C

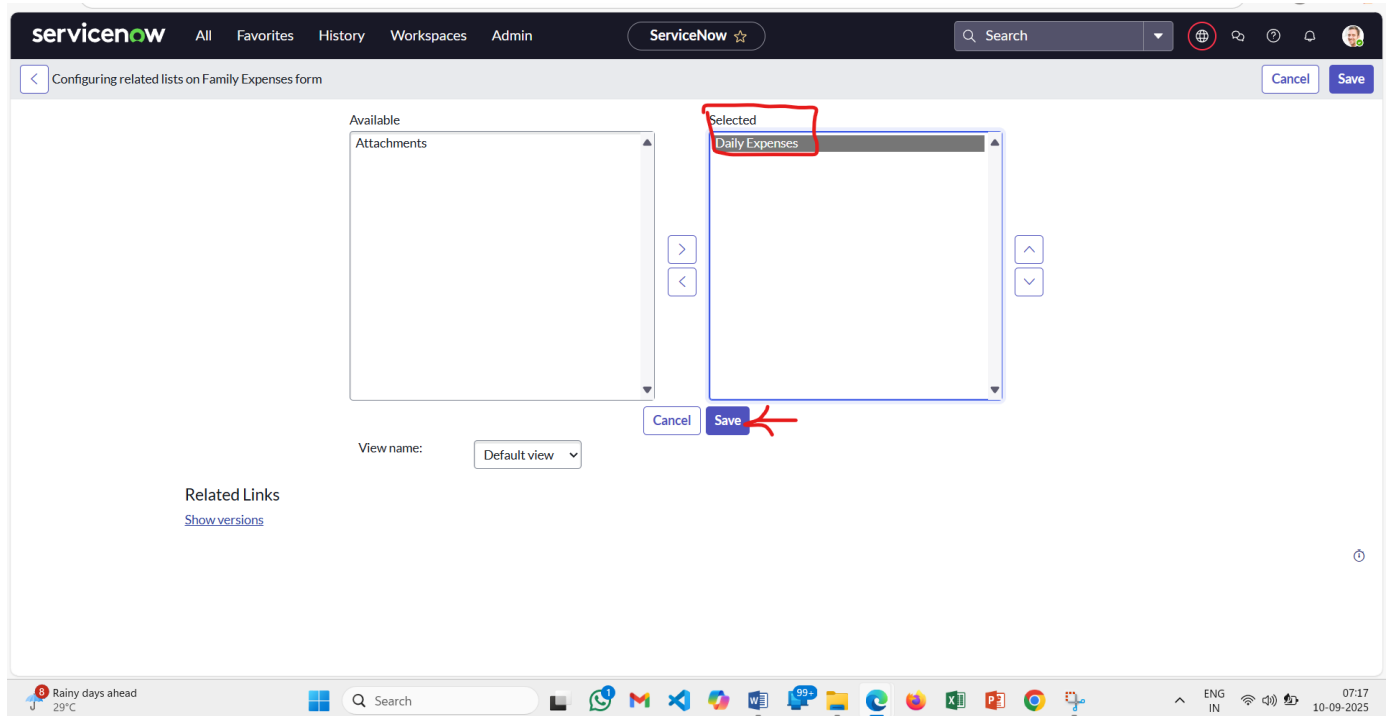
Search

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## Milestone 5: Configuring Related List on Family Expenses

### Activity 1: Create a Flow to Assign operations ticket to group

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there >> click on Configure >> Select Related Lists
4. Add Daily Expenses to the Selected Area.
5. Click on Save



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< Configuring related lists on Family Expenses form Cancel Save

Available  
Attachments

Selected  
Daily Expenses

> < ^ v

View name: Default view

Cancel Save

Related Links  
[Show versions](#)

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Search

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## Milestone 6: Creation of Business Rules

### Activity1: Creation of Business Rules

1. Go to All >> In the filter search for Business Rules.
2. Under System Definition Select Business Rules then click on New.
3. Enter the Details:  
 Name: Family Expenses BR  
 Table: Select Daily Expenses  
 Check Advanced

Business Rule  
New record

Business rule is a server-side script that runs when a record is displayed, inserted, deleted, or when a table is queried. Use business rules to automatically change values in form fields when the specified conditions are met





Name  


Table  

Application  

Active ☒

Advanced ☒ 


#### 4. In when to run Check Insert and Update

**When to run**  **Actions** **Advanced**

Specify whether the business rule should run on **Insert** or **Update**. Use **Filter Conditions** to specify under which conditions

When

Order

 **Insert** ☒


**Update** ☒

Delete ☐

Query ☐

Filter Conditions

-- choose field --

Role conditions 

#### 5. In Advance (we write the code): Write the below code >>

```
(function execute Rule (current, previous /*null when async*/) {

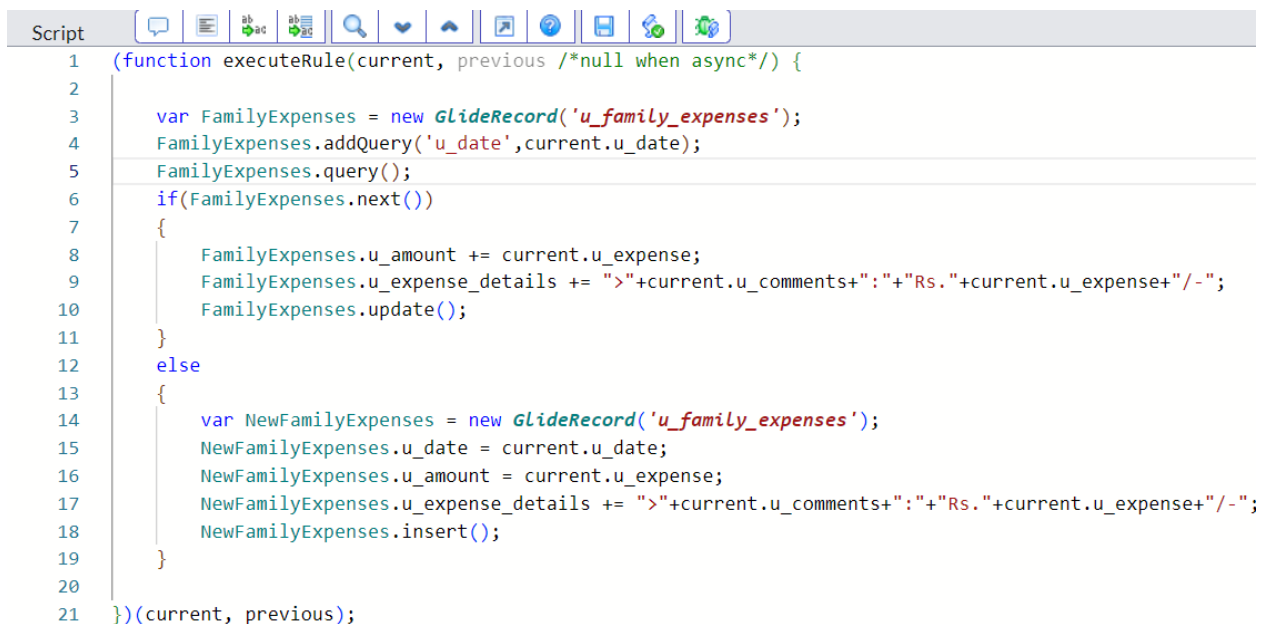
var Family Expenses = new Glide Record (' u_family_expenses ');
Family Expense. Add Query('u_date',current.u _date);
Family Expenses. query();
If (Family Expenses. next())
{
Family Expenses .u _amount += current .u _expense;
}
```

```

Family Expenses .u_expense_details += ">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
";
Family Expenses. update();
}
else
{
var New Family Expenses = new GlideRecord('u_family_expenses');
New Family Expenses. u_date = current. u_date;
New Family Expenses. u_amount = current. u_expense;
New Family Expenses .u_expense_details +=
">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
";
New Family Expenses. insert();
}

})(current, previous);

```



```

Script
1  (function executeRule(current, previous /*null when async*/) {
2
3      var FamilyExpenses = new GlideRecord('u_family_expenses');
4      FamilyExpenses.addQuery('u_date', current.u_date);
5      FamilyExpenses.query();
6      if(FamilyExpenses.next())
7      {
8          FamilyExpenses.u_amount += current.u_expense;
9          FamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
10         ";
11         FamilyExpenses.update();
12     }
13     else
14     {
15         var NewFamilyExpenses = new GlideRecord('u_family_expenses');
16         NewFamilyExpenses.u_date = current.u_date;
17         NewFamilyExpenses.u_amount = current.u_expense;
18         NewFamilyExpenses.u_expense_details += ">" + current.u_comments + ":" + "Rs." + current.u_expense + "/" -
19         ";
20         NewFamilyExpenses.insert();
21     }
22 })(current, previous);

```

6. Go to the Header and right click there>> click on Save.

## Milestone 7: Configure the Relationship

### Activity1: Configure the Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.

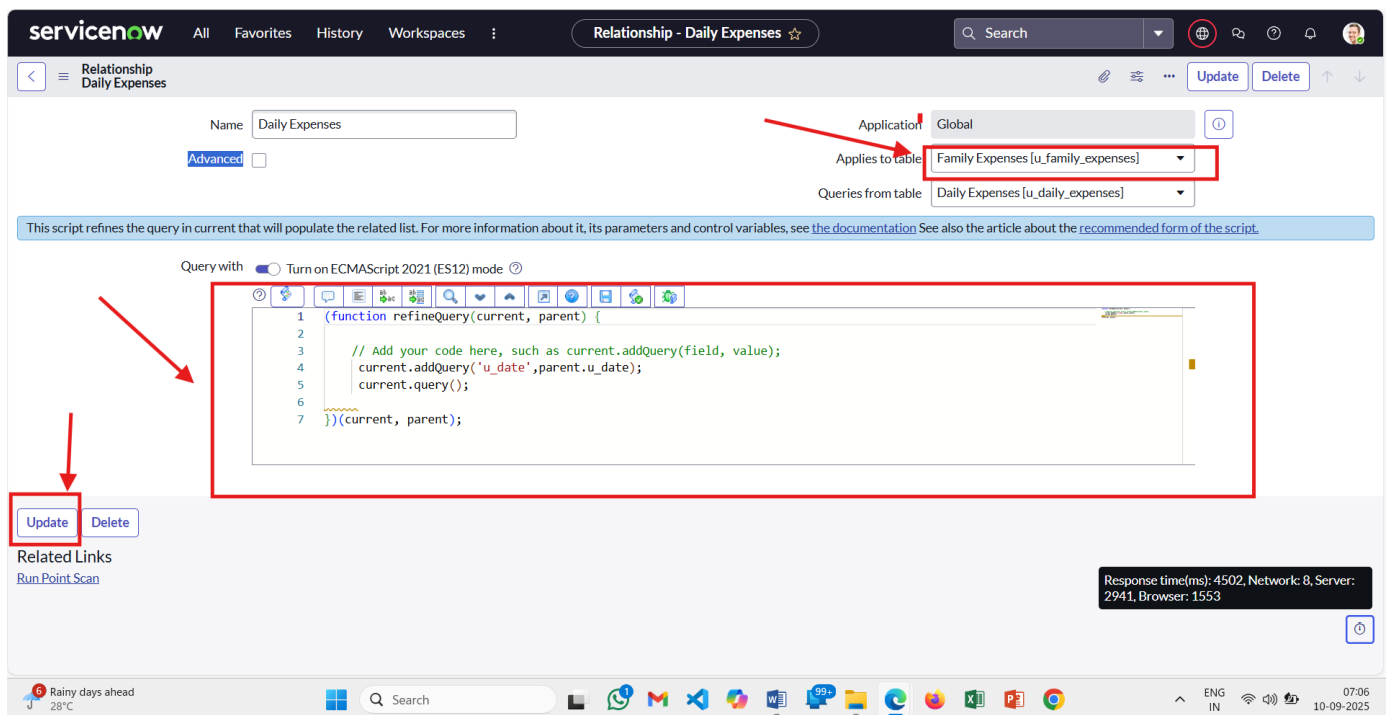
3. For Applies to table: Select Family Expenses.
4. In Query with: write the below Query.

```
(function refine Query (current, parent) {
```

```
// Add your code here, such as current. add Query (field, value);
current. add Query ('u_ date', parent. u_ date);
current. Query ();
```

```
})();
```

5. Click on Update.



servicenow All Favorites History Workspaces Relationship - Daily Expenses Search

Name: Daily Expenses Advanced ☐

Application: Global

Applies to table: Family Expenses [u\_family\_expenses]

Queries from table: Daily Expenses [u\_daily\_expenses]

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Query with ☐ Turn on ECMAScript 2021 (ES12) mode

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3   // Add your code here, such as current.addQuery(field, value);
4   current.addQuery('u_date', parent.u_date);
5   current.query();
6
7 })(current, parent);

```

Update Delete

Related Links  
[Run Point Scan](#)

Response time(ms): 4502, Network: 8, Server: 2941, Browser: 1553

Rainy days ahead 28°C

Search

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**Conclusion:** A successful ServiceNow "family" (project or platform) implementation, even a costly one, is concluded by demonstrating tangible business value through strategic alignment, improved operational efficiency, and positive user satisfaction. Achieving these outcomes requires senior expertise, comprehensive process mapping, a strong focus on configuration over customization, and ongoing transparent communication to manage risks, ensuring the project delivers its intended benefits and a positive return on investment.