Calculating Family Expenses using ServiceNow
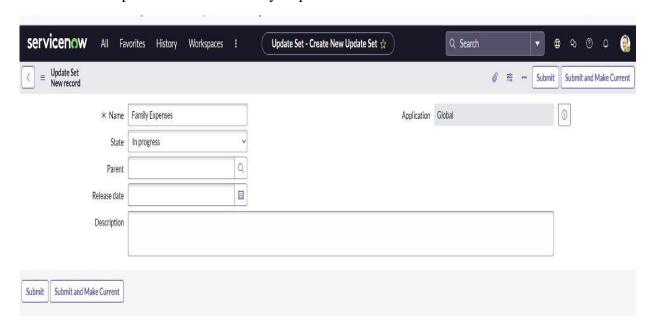
Date	28 June 2025
Team ID	LTVIP2025TMID29793
Project Name	Calculating Family Expenses using Service Now
Maximum Marks	10 Marks

Milestone 1: Setting Up ServiceNow Instance:

- o Sign up on developer.servicenow.com and create a developer account.
- o Navigate to the Personal Developer Instance section and request a new instance.
- o Fill out the required information and submit the request.
- o Instance details (URL, username, password) will be sent via email.
- o Log in to the instance using the provided credentials.
- o The instance is ready for development and customization.

Milestone 2: Creation of New Update Set:

- Creating a Local Update Set in ServiceNow
  - o Navigate to All in the application navigator.
  - o In the filter search bar, type Local Update Set and select it from the results.
  - o Click on the New button to create a new update set.
    - ■ Name: Family Expenses
  - o In the form that appears, enter the following details:
  - o Click on Submit to save the update set.
  - o After submission, click on Make Current to set this update set as the active one.
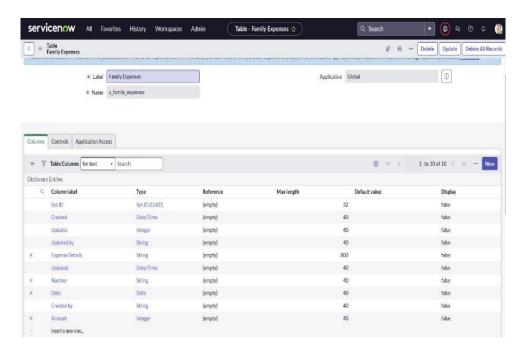- Then created update set called "Family Expenses" and made it current

Milestone 3: Creation of Table (Family Expenses):

- Creation of Family Expenses tables and its fields:
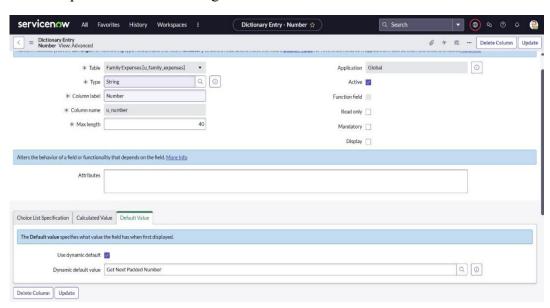
Family Expenses Table Fields

Field Name	Type	
Number	String	Auto populate Number with Prefix MFE
Date	Date	
Amount	Integer	
Expense Details	String	Max Length 800

- o Navigate to All in the application navigator.
- o In the filter search bar, type Tables and select it from the results.
- o Click on the New button to create a new table.
- o In the form, provide the following details:
  - Label: Family Expenses
  - Name: Auto-Populated (automatically generated based on the label)
  - New menu name: Family Expenditure
- o Navigate to the header section of the form, right-click on the header, and select Save from the context menu.
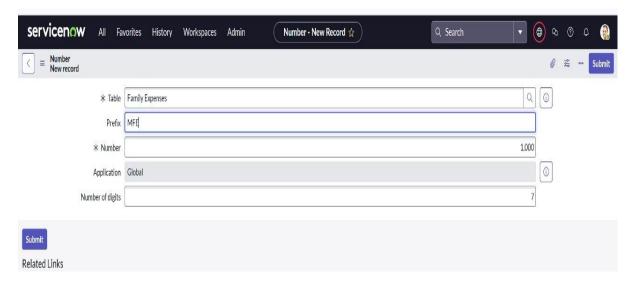

- Making Number Field an Auto-Number:
  - o In the Columns section of the *Family Expenses* table, locate and double-click on the Number field to open its configuration.
  - o Scroll down and double-click on Advanced view to expand additional settings.
  - o Under the Default Value section:
  - o Enable the checkbox for Use dynamic default.
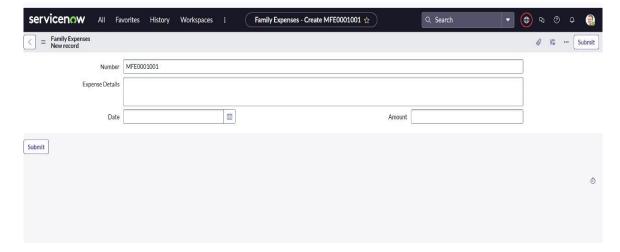 - o Set the Dynamic default value to Get Next Padded Number.

o   Click on Update to save the changes to the field.

- Setting Up Number Maintenance for the Family Expenses Table
    o   Navigate to All in the application navigator.
    o   In the filter search bar, type Number Maintenance and select it from the list.
    o   Click on the New button to create a new number maintenance record.
    o   Provide the following details:
        ▪   Table: Family Expenses
        ▪   Prefix: MFE
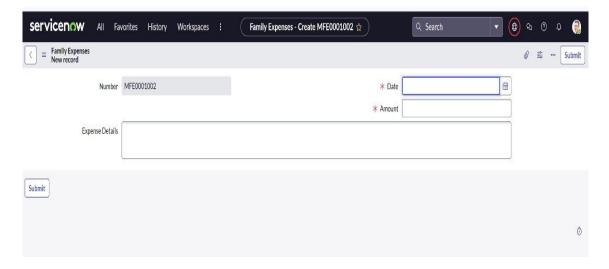   o   Click on Submit to save the configuration.

- Configure the Form:
    o   Navigate to All in the application navigator.
    o   In the filter search bar, type Family Expenses and select it from the results to open the module.
    o   Click on the New button to open a new record form.
    o   In the form header, right-click and select Configure > Form Design from the dropdown menu.
    o   In the Form Designer, use drag-and-drop functionality to customize the layout of the form fields as needed. Fields can be rearranged, moved between sections, or grouped based on specific requirements.
    o   Once the desired layout has been achieved, click Save or Close to apply the changes.
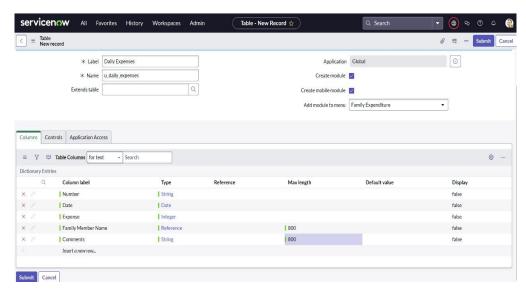   ▪   Before Form design:

- Form design:

- After form design:

Milestone 4: Creation of Table (Daily Expenses):
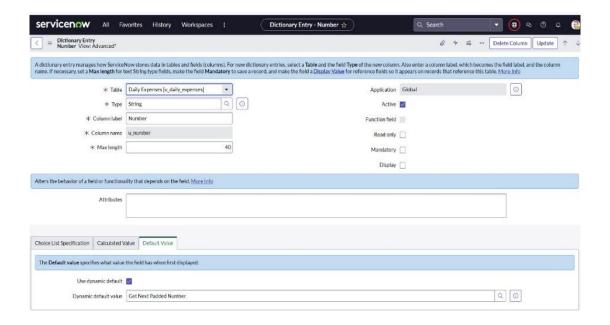
- Creation of Daily Expenses Table and its fields:

Daily Expenses Table Fields

Field Name	Type	
Number	String	Auto populate Number with Prefix DFE
Family Member Name	Reference	Sys_User
Date	Date	
Expense	Integer	
Comments	String	Max Length 800

  - o Navigate to All in the application navigator.
  - o In the filter search bar, type Tables and select it from the list.
  - o Click on the New button to create a new table.
  - o Fill in the following details in the form:
    - ▪ Label: Daily Expenses
    - ▪ Name: Auto-Populated (automatically generated based on the label)
    - ▪ Add Module to menu: Family Expenditure
  - o Navigate to the header of the form, right-click, and select Save from the context menu.

- Making Number Field an Auto-Number:
  - o In the Columns section of the Daily Expenses table, locate and double-click on the Number field to open its configuration.
  - o Scroll down and double-click on Advanced view to expand additional settings.
  - o Under the Default Value section:
  - o Enable the checkbox for Use dynamic default.
  - o Set the Dynamic default value to Get Next Padded Number.
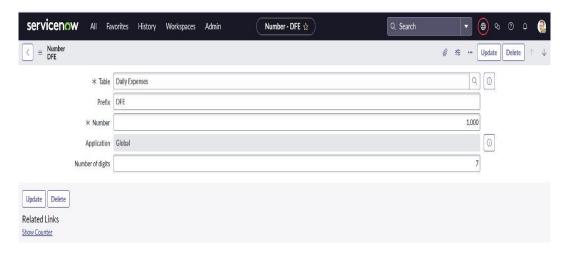 - o Click on Update to save the changes to the field.

- Setting Up Number Maintenance for the Daily Expenses Table
  - Navigate to All in the application navigator.
  - In the filter search bar, type Number Maintenance and select it from the list.
  - Click on the New button to create a new number maintenance record.
  - Provide the following details:
    - Table: Daily Expenses
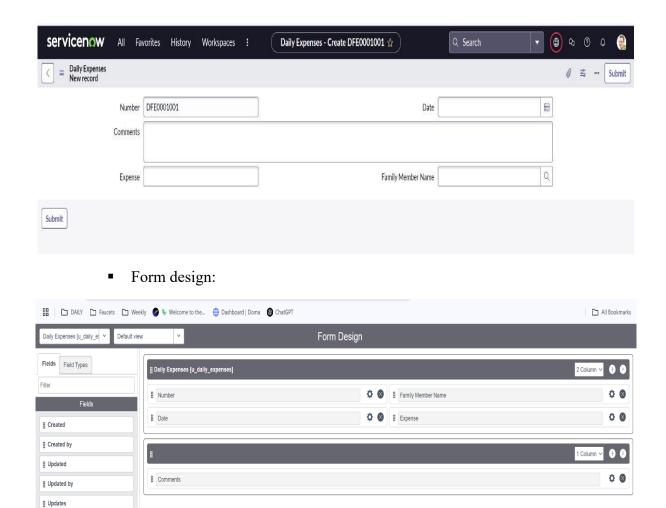   - Prefix: DFE
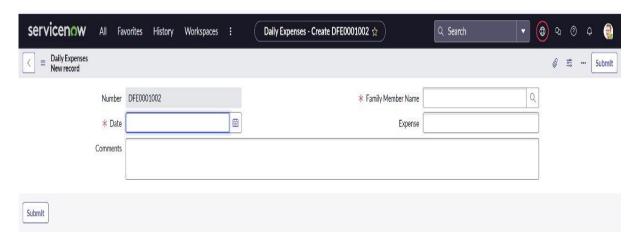 - Click on Submit to save the configuration.

- Configure the Form:
  - Navigate to All in the application navigator.
  - In the filter search bar, type Daily Expenses and select it from the results to open the module.
  - Click on the New button to open a new record form.
  - In the form header, right-click and select Configure > Form Design from the dropdown menu.
  - In the Form Designer, use drag-and-drop functionality to customize the layout of the form fields as needed. Fields can be rearranged, moved between sections, or grouped based on specific requirements.
  - Once the desired layout has been achieved, click Save or Close to apply the changes.
    - Before Form design:

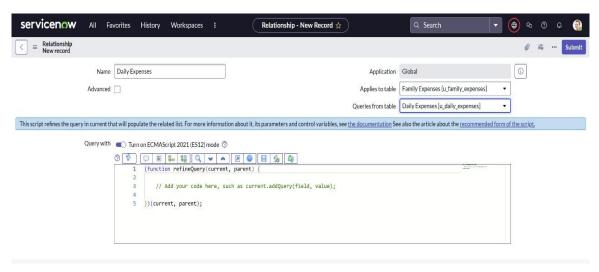- Form design:

- After form design:

Milestone 5: Creation of Relationship:

- Creation of Relationship between Family Expenses and Daily Expenses tables
  - Navigate to All in the application navigator.
  - In the filter search bar, type Relationships and select it from the list.
  - Click on the New button to create a new relationship.
  - Enter the following details:
    - Name: Daily Expenses
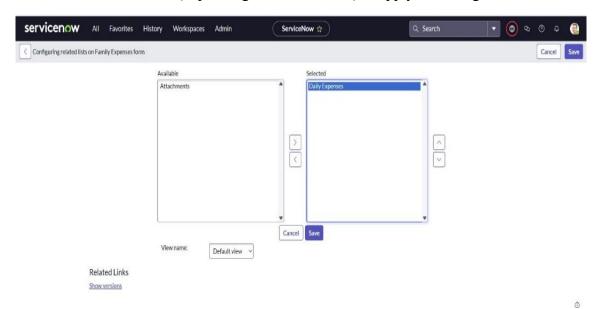
- ▪ Applies to Table: Family Expenses
- ▪ Queries to Table: Daily Expenses

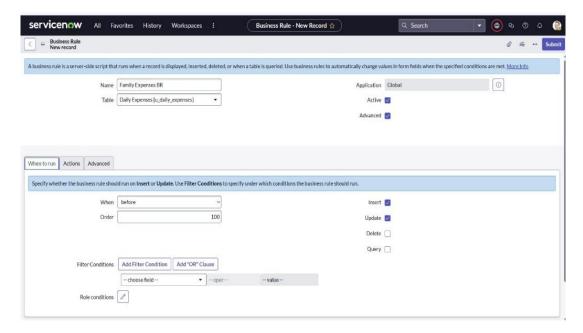- Click Save to store the relationship.

Milestone 6: Configuring Related List on Family Expenses:

- o Navigate to All in the main menu.
- o In the filter/search bar, type Family Expenses, then select and open the Family Expenses module.
- o Click on the New button to create a new Family Expenses record.
- o In the header section of the screen, right-click and choose Configure from the context menu.
- o From the configuration options, select Related Lists.
- o In the Related Lists configuration screen, locate Daily Expenses in the available list.
- o Move Daily Expenses to the Selected area to include it in the related lists for Family Expenses.
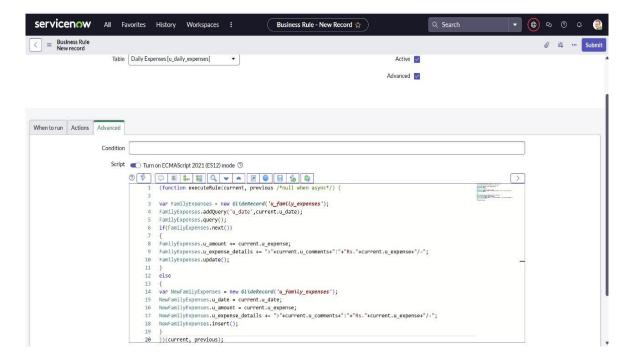- o Click Save or Done (depending on the interface) to apply the changes.

Milestone 7: Creation of Business Rules:

o From the main navigation, go to All.

o In the search or filter bar, type Business Rules.

o Under the System Definition section, click on Business Rules.

o Click on the New button to create a new business rule.

o Fill in the Business Rule Details:

- Name: Family Expenses BR
- Table: Select Daily Expenses from the dropdown list.

o Check the box labeled Advanced to enable additional configuration options.

o Configure When to Run: Under the When to Run section, make sure the following options are checked:

- Insert
- Update

o In Advance (write the code): Write the below code >>

Milestone 8: Configure the Relationship:

- From the main navigation, go to All.
- In the search bar, type Relationships, then open the Relationships module.
- Locate and open the Daily Expenses Relationship record.
- Set the Following Details:
    - For Applies to table, select Family Expenses from the dropdown list.
- After entering the script, click Update to save your changes.