Ideation Phase

Brainstorm & Idea Prioritization

Date	01 November 2025
Team ID	NM2025TMID00653
Project Name	Calculating Family Expenses using ServiceNow
Maximum Marks	4 Marks

Project Overview:

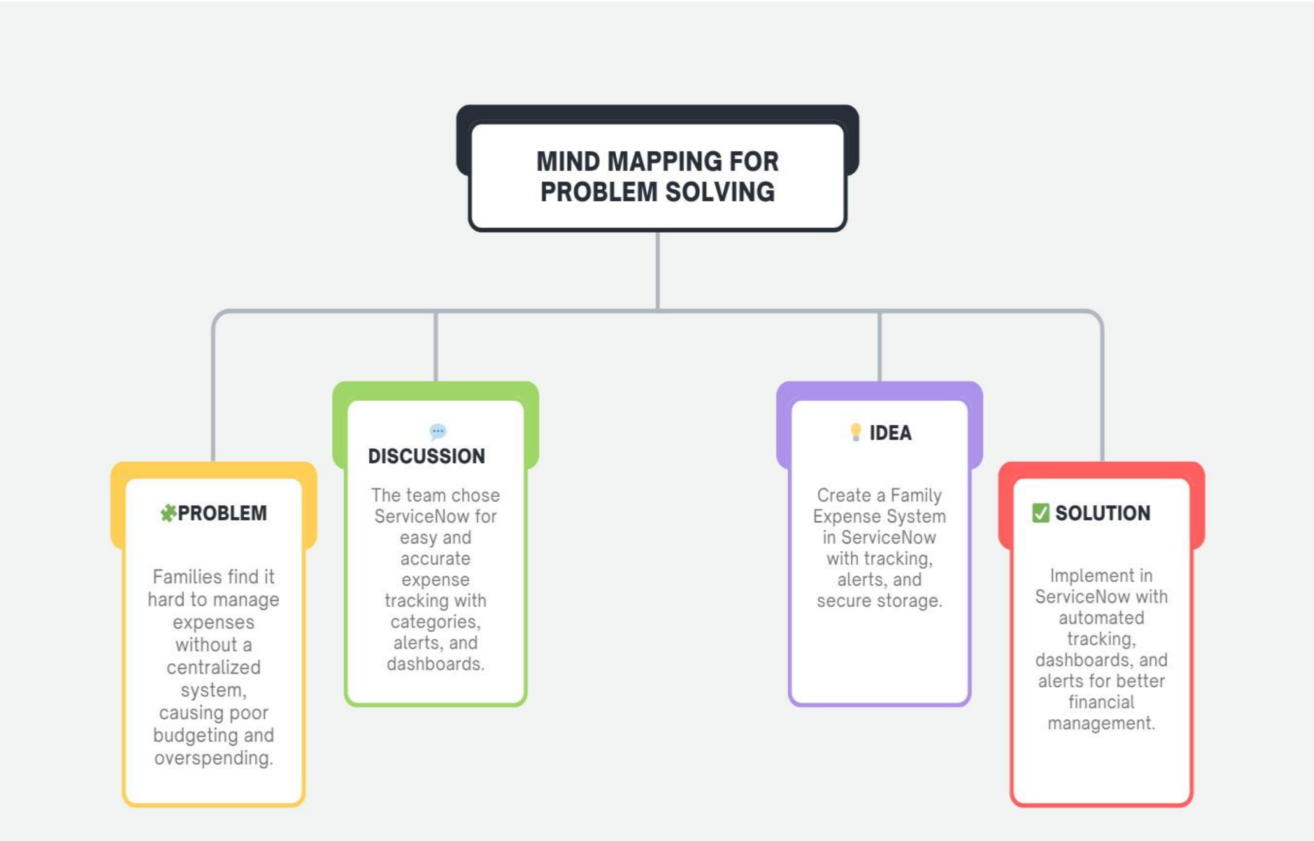
This guided project demonstrates how to develop an intelligent family expense management system using ServiceNow. The platform will enable users to track, categorize, and manage their expenses efficiently. The system automates financial tracking, generates insights, and supports budget planning.

It involves creating expense categories, storing transactions in ServiceNow tables, and building workflows to automate alerts when a budget exceeds the limit. The system also generates reports and visual dashboards for easy understanding of financial habits. By leveraging ServiceNow's automation, the solution ensures accuracy, data consistency, and scalability for different family sizes.

Step-1: Team Gathering, Collaboration, and Selection of the Problem Statement

The team collaborated to identify a real-life issue that affects every household—inefficient tracking of family expenses. Families often find it difficult to monitor where their money goes, which leads to poor budgeting and financial stress.

After discussing various project ideas, the team selected *"Calculating Family Expenses using ServiceNow"* as it provides a practical, scalable, and technology-driven solution to this everyday problem.



Step-2: Brainstorm, Idea Listing, and Grouping

Brainstorm:

Team members contributed creative ideas for how ServiceNow can be used to automate expense management. Suggestions included:

- Creating custom tables for storing categorized expenses.
- Developing workflows to alert users when a budget limit is reached.
- Using dashboards for visualization and analytics.
- Integrating APIs for data import/export from other applications.

Idea Listing:

All ideas were listed to ensure inclusiveness:

1. Expense categorization (Food, Utilities, Education, etc.)
2. Monthly budget setup

3. Expense tracking form
4. Data visualization dashboards
5. Email/SMS budget alerts
6. Expense history reports
7. Role-based access for family members

Grouping:

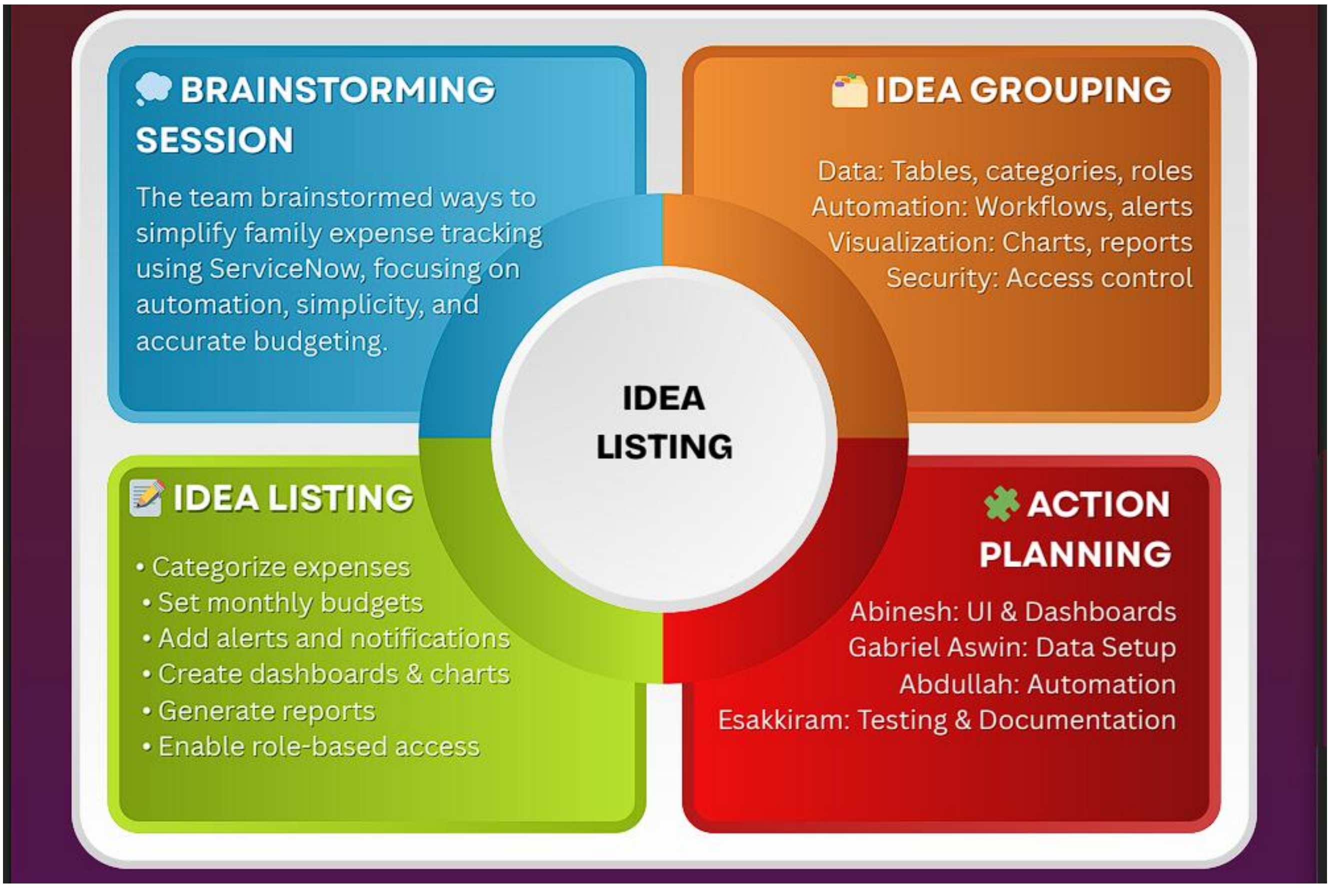
Ideas were grouped into major categories:

- **Data Management:** Tables and forms for expense entry.
- **Automation & Alerts:** Workflows and notifications.
- **Visualization:** Dashboards and reports.
- **Security:** Role-based data access and privacy.

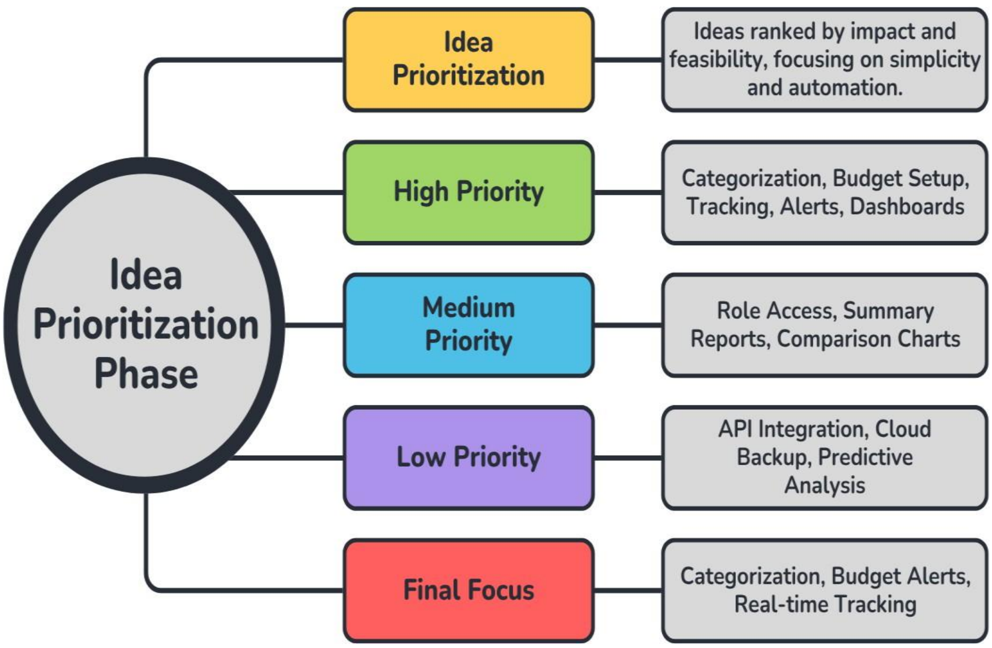
Action Planning:

The team divided tasks based on expertise:

- *UI Developer* – Create forms and dashboards
- *Back-end Developer* – Configure tables and business rules
- *Tester* – Validate workflows and alerts
- *Documentation Lead* – Prepare project reports



Step-3: Idea Prioritization



Idea prioritization helped refine the project by focusing on the most impactful features first. The team prioritized:

1. **Expense Categorization and Budget Setting** – Core functionality.
2. **Automated Alerts** – Enhances user engagement.
3. **Visual Reports** – Improves decision-making.
4. **Security and Role Management** – Ensures safe data handling.

Idea Prioritization

By polarizing and ranking ideas, the project became clearer and easier to implement. The team visualized processes through ServiceNow workflows and UI diagrams to define interactions between modules. This structured prioritization ensures smooth development, efficient resource use, and strong end-user satisfaction.