**✅ Step-by-Step: Project Planning Guide**

**🧭 1. Project Overview**

**Project Name**: Family Expense Tracker – ServiceNow  
**Objective**: Build a custom application in ServiceNow to track, manage, and report household expenses with role-based access, automation, and reports.  
**Duration**: 4–6 weeks (depending on scope)  
**Project Manager**: [Your Name or Role]  
**Stakeholders**: Family Admin (Parent), Family Members

**📋 2. Scope of Work**

**In Scope:**

* Custom tables for expenses and budgets
* User interface via Service Portal and Now Mobile
* Budget setup and threshold alerts
* Automated notifications and monthly reports
* Role-based access and dashboards

**Out of Scope:**

* Integration with bank accounts or third-party apps (unless specified later)
* Financial forecasting or AI-powered analysis

**🗂 3. Project Phases & Tasks**

| **Phase** | **Duration** | **Tasks** |
| --- | --- | --- |
| **1. Planning & Design** | 3–5 days | Define requirements, design UI mockups, data model |
| **2. Development** | 10–12 days | Build tables, forms, workflows, and UI |
| **3. Testing** | 3–5 days | UAT with test users, fix bugs |
| **4. Deployment** | 2–3 days | Deploy to production, setup roles & permissions |
| **5. Training & Handover** | 1–2 days | Provide training guide, documentation |
| **6. Maintenance** | Ongoing | Monitor system, apply updates as needed |

**📅 4. Gantt Chart or Timeline (Simplified)**

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Week 1: [Planning] -----------------■■■■■

Week 2: [Development] --------------■■■■■■■■■

Week 3: [Testing + Deployment] -----■■■■■■

Week 4: [Training + Go Live] -------■■■

*(Tools: You can build this in Excel, Trello, Asana, or use ServiceNow’s Project Portfolio Management (PPM) if available.)*

**👥 5. Roles & Responsibilities**

| **Role** | **Responsibility** |
| --- | --- |
| **Project Manager** | Plan, track progress, communicate with users |
| **Developer** | Build custom tables, logic, and UI in ServiceNow |
| **Tester (User)** | Test flows, report issues, provide feedback |
| **Family Admin** | Define categories, budgets, approve expenses |
| **ServiceNow Admin** | Manage roles, deploy app to production |

**🎯 6. Deliverables**

| **Deliverable** | **Description** |
| --- | --- |
| App Scoped Package | Custom app with tables, forms, UI |
| Budget & Expense Forms | Configured for family use |
| Notification Rules | For budget thresholds |
| Dashboards & Reports | For monthly insights |
| Training Guide | Simple user guide or demo video |

**🚨 7. Risks & Mitigation**

| **Risk** | **Mitigation** |
| --- | --- |
| Users not adopting the tool | Provide mobile access and intuitive design |
| Over-complexity | Keep UI and logic simple, use low-code tools |
| Data not accurate | Add validations and alerts for missing info |

**🧰 8. Tools Used**

* **ServiceNow Studio** – App development
* **Service Portal** – User interface
* **Now Mobile** – On-the-go expense logging
* **Flow Designer** – Alerts and automations
* **Excel or Trello** – Project task tracking
* *(Optional)* ServiceNow Project Portfolio Management (PPM) for enterprise teams

**📄 Final Output: Project Plan Document**