

Ideation Phase

Brainstorm & Idea Prioritization

Template

Date : 02 NOVEMBER 2025

Team ID : NM2025TMID09055

Project Name : Calculating Family Expenses Using ServiceNow

Maximum Marks : 4 Marks

Prevent user deletion if assigned to an incident Template :

This guided project demonstrates how to track and calculate family expenses using the ServiceNow platform. The project begins by setting up a ServiceNow instance, creating necessary tables, and defining relationships between them. It allows users to record daily expenses, categorize them, and generate summaries for better financial planning.

By using ServiceNow tables, relationships, and business rules, this project provides an automated and structured approach to managing family budgets. Administrators can easily configure related lists, view all expense details, and ensure accurate calculations of total spending.

The workflow also includes a validation process to ensure that expense entries are recorded correctly and categorized properly. A test scenario is performed to verify that the system correctly calculates daily and total family expenses. This approach helps users maintain clear financial records and understand their spending patterns effectively.

Step 1: Team Gathering, Collaboration, and Problem Statement Selection

PROJECT DETAILS

Calculating Family Expenses Using Service Now

+ Setting Up ServiceNow Instance

+ Creation Of New Update Set

+ Creation Of Table

+ Creation Of Table

+ Creation Of Table(Daily
Expenses)

+ Creation Of Relationship

+ Configuring Related List On
Family Expenses

+ Creation Of Business Rules

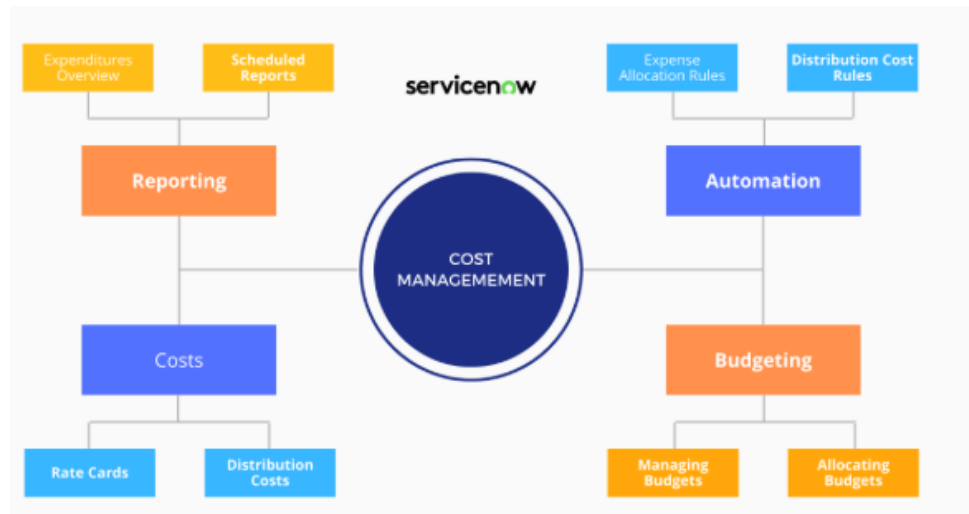
+ Configure The Relationship

Conclusion

Problem Statement:

Families often struggle to monitor their daily expenses efficiently. Our goal is to design a ServiceNow-based solution that helps track, store, and analyze family expenses automatically.

Step 2: Brainstorming, Idea Listing, and Grouping



Brainstorm:

Team members discussed ways to use ServiceNow for tracking and calculating family expenses efficiently through custom tables and automation.

Idea Listing:

All ideas were noted, including setting up the instance, creating tables, defining relationships, adding business rules, and configuring related lists.

Grouping:

Similar ideas were categorized into table design, data relationships, automation rules, and expense reporting for clarity and focus.

Action Planning:

Tasks were divided among team members for table creation, relationship setup, and business rule testing to ensure smooth project completion.

Step 3: Idea Prioritization



reference: <https://fastercapital.com/topics/prioritizing-expenses-and-goals.html/1>

Idea Prioritization:

Idea prioritization helped in breaking down the project into clear stages. The main goal was to accurately calculate and display family expenses based on daily spending records. By prioritizing, we ensured that the most critical parts — like table relationships and business rules — were implemented first. This made it easier to automate calculations and prevent errors in expense totals. Visual tools like flowcharts and relationship diagrams were used to communicate how data moves from one table to another. This clarity improved teamwork and simplified the development process. Overall, idea prioritization made it easier to focus on automation, accuracy, and ease of use, resulting in a reliable expense tracking system using ServiceNow.