

PROJECT PLANNING PHASE

Date	1 November 2025
Team ID	NM2025TMID03847
Project Name	Educational Organisation using Service Now
Maximum Marks	5 Marks

Project Planning Phase – Educational Organisation Using ServiceNow

The Project Planning Phase acts as a crucial link between ideation and execution. It outlines the strategic roadmap for building the Educational Management System on the ServiceNow platform. This phase emphasizes task identification, prioritization of development activities, formulation of user stories, and effort allocation through a structured Agile methodology.

1. Objectives of the Project Planning Phase

- Transform identified ideas into structured, actionable development tasks.
- Define and prioritize the Product Backlog according to business objectives and user value.
- Design sprint plans that support iterative progress and on-time delivery.
- Decompose the system into user stories that capture functionality from the end-user's viewpoint.
- Allocate story points to gauge the effort and complexity of each development task.

2. Product Backlog

The Product Backlog outlines all the features and requirements slated for implementation in the Educational Management System. Each entry reflects a high-level functionality originating from the ideation phase.

Backlog ID	Feature / Requirement	Description	Priority	Status

PB-01	Instance Setup	Create and configure ServiceNow Developer Instance for project work.	High	Completed
PB-02	Update Set Creation	Create local update set named “Educational Organisation” for change tracking.	High	Completed
PB-03	Salesforce Table	Design Salesforce table to store teacher and student information.	High	Completed
PB-04	Admission Table	Create Admission Table extending Salesforce to manage admission process.	High	Completed
PB-05	Student Progress Table	Create Student Progress Table to record academic performance.	High	Completed
PB-06	Form Design	Customize form layouts for all tables to improve usability.	Medium	In Progress
PB-07	Process Flow	Create process flow for admission lifecycle (New → In Progress → Joined → Closed).	High	Completed
PB-08	Auto Populate Script	Develop client script to autofill admission details from admission number.	High	Completed
PB-09	Pincode Script	Develop script to auto-fill city and district details based on pincode.	Medium	Completed
PB-10	Progress Calculation Script	Automate total, percentage, and result fields in Student Progress form.	High	Completed

Backlog ID	Feature / Requirement	Description	Priority	Status
PB-11	Disable Fields Script	Lock auto-calculated fields to prevent manual entry.	Medium	Completed
PB-12	Testing & Validation	Test all client scripts and forms for logical accuracy and data integrity.	High	Pending

3. Sprint Planning

Agile methodology was employed for both planning and execution. The project was structured into three sprints, each dedicated to delivering targeted modules and promoting iterative development.

Sprint	Duration	Sprint Goal	Modules / Tasks	Expected Outcome
Sprint 1	Week 1–2	Setup & Configuration	Instance setup, update set creation, Salesforce table	Functional base platform ready
Sprint 2	Week 3–4	Core Development	Admission table, Student progress table, Form design, Process flow	Core modules of EMS implemented
Sprint 3	Week 5–6	Automation & Testing	Client scripts (Auto Populate, Pincode, Total, Percentage, Result), Testing	Fully functional automated EMS

Sprint Review Process

At the end of each sprint:

- Features were tested for functional correctness.
- Bugs and issues were documented and moved to the next sprint for resolution.

- Feedback from stakeholders (teachers/admin users) was reviewed for UI and logic improvements.

4. User Stories

Each functionality was broken into **user stories** — concise descriptions from the user's perspective — ensuring that each deliverable meets a specific user need.

Story ID	User Story Description	Acceptance Criteria	Priority
US-01	As an admin , I want to create a new ServiceNow instance so that I can start developing the system.	Instance created and accessible.	High
US-02	As an admin , I want to create an update set to track my configurations.	Update set successfully created and made current.	High
US-03	As a developer , I want to create a Salesforce table to store student and teacher data.	Table created with required columns.	High
US-04	As a staff member , I want to manage admissions through a digital form.	Admission table with form design ready.	High
US-05	As a teacher , I want to track student grades and calculate results automatically.	Student Progress table with automation scripts works correctly.	High

US-06	As an admin , I want admission numbers to autogenerate to maintain uniqueness.	Auto number sequence works for each new admission.	High
Story ID	User Story Description	Acceptance Criteria	Priority
US-07	As a user , I want to enter a pincode and have location fields auto-filled.	Pincode-based auto-fill script works for all valid values.	Medium
US-08	As a teacher , I want total and percentage fields to be calculated automatically.	Total and percentage autoupdate when marks are entered	High
US-09	As an admin , I want to prevent editing of systemgenerated fields.	Fields are disabled post calculation.	Medium
US-10	As a user , I want to view a clear form layout for easy data entry.	Form design matches user requirements.	Medium

5. Story Points Estimation

Story points are used to estimate the effort, complexity, and time required for each user story. A **Fibonacci scale (1, 2, 3, 5, 8, 13)** is used to assign points.

Story ID	Feature / Task	Story Points	Complexity Level
US-01	Instance Setup	2	Low
US-02	Update Set Creation	1	Low

US-03	Salesforce Table Creation	5	Medium
US-04	Admission Table Creation	5	Medium
US-05	Student Progress Table	8	High
Story ID	Feature / Task	Story Points	Complexity Level
US-06	Admission Number Automation	5	Medium
US-07	Pincode Auto-Fill Script	3	Medium
US-08	Percentage & Result Calculation	8	High
US-09	Disable Fields Script	2	Low
US-10	Form Design Customization	3	Medium
Total Story Points	—	42	—

6. Deliverables of the Planning Phase

- A detailed Product Backlog highlighting priorities and task dependencies
- Sprint Schedule mapping task progression and iteration objectives
- User Stories encompassing core features and automation requirements
- Effort Estimation Matrix using story points to balance workload and complexity
- Clearly defined Acceptance Criteria to uphold quality standards and user satisfaction

7. Conclusion – Project Planning Phase Summary

The Project Planning Phase laid out a clear and organized roadmap for developing the Educational Management System on the ServiceNow platform.

By embracing Agile methodology, the project team promoted flexibility, transparency, and continuous progress. The structured product backlog, well-defined user stories, and story point estimations offered clarity on workload and timelines—setting the stage for a productive and successful development phase.