

# PROJECT PLANNING PHASE

<b>Date</b>	<b>1 November 2025</b>
<b>Team ID</b>	<b>NM2025TMID03580</b>
<b>Project Name</b>	<b>Educational Organisation using Service Now</b>
<b>Maximum Marks</b>	<b>5 Marks</b>

## Project Planning Phase – Educational Organisation Using ServiceNow

The **Project Planning Phase** serves as a bridge between ideation and implementation. It defines the roadmap for developing the Educational Management System using **ServiceNow**. This phase focuses on identifying the tasks, prioritizing development activities, defining user stories, and allocating efforts through a structured Agile-based approach.

### 1. Objectives of the Project Planning Phase

- To organize the identified ideas into actionable development tasks.
- To define and prioritize the **Product Backlog** based on business needs and user impact.
- To plan **sprints** that ensure iterative development and timely delivery.
- To break the system into **user stories** that describe specific functionalities from the user's perspective.
- To assign **story points** to estimate effort and complexity for each development task.

### 2. Product Backlog

The **Product Backlog** lists all features and requirements to be implemented for the Educational Management System. Each item represents a high-level functionality derived from the ideation phase.

<b>Backlog ID</b>	<b>Feature / Requirement</b>	<b>Description</b>	<b>Priority</b>	<b>Status</b>
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 auto-fill 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

<b>Backlog ID</b>	<b>Feature / Requirement</b>	<b>Description</b>	<b>Priority</b>	<b>Status</b>
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 adopted for planning and execution. The project was divided into **three sprints**, each focusing on delivering specific modules and ensuring iterative development.

<b>Sprint</b>	<b>Duration</b>	<b>Sprint Goal</b>	<b>Modules / Tasks</b>	<b>Expected Outcome</b>
<b>Sprint 1</b>	Week 1–2	Setup & Configuration	Instance setup, update set creation, Salesforce table	Functional base platform ready
<b>Sprint 2</b>	Week 3–4	Core Development	Admission table, Student progress table, Form design, Process flow	Core modules of EMS implemented
<b>Sprint 3</b>	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 <b>admin</b> , 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 <b>admin</b> , I want to create an update set to track my configurations.	Update set successfully created and made current.	High
US-03	As a <b>developer</b> , I want to create a Salesforce table to store student and teacher data.	Table created with required columns.	High
US-04	As a <b>staff member</b> , I want to manage admissions through a digital form.	Admission table with form design ready.	High
US-05	As a <b>teacher</b> , I want to track student grades and calculate results automatically.	Student Progress table with automation scripts works correctly.	High
US-06	As an <b>admin</b> , I want admission numbers to auto-generate to maintain uniqueness.	Auto number sequence works for each new admission.	High

<b>Story ID</b>	<b>User Story Description</b>	<b>Acceptance Criteria</b>	<b>Priority</b>
US-07	As a <b>user</b> , 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 <b>teacher</b> , I want total and percentage fields to be calculated automatically.	Total and percentage auto-update when marks are entered	High
US-09	As an <b>admin</b> , I want to prevent editing of system-generated fields.	Fields are disabled post calculation.	Medium
US-10	As a <b>user</b> , 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.

<b>Story ID</b>	<b>Feature / Task</b>	<b>Story Points</b>	<b>Complexity Level</b>
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

<b>Story ID</b>	<b>Feature / Task</b>	<b>Story Points</b>	<b>Complexity Level</b>
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
<b>Total Story Points</b>	—	<b>42</b>	—

## 6. Deliverables of the Planning Phase

- **Comprehensive Product Backlog** with priorities and dependencies.
- **Sprint Schedule** outlining task flow and iteration goals.
- **User Stories** covering all key features and automation tasks.
- **Effort Estimation Matrix** with story points to manage workload efficiently.
- **Defined Acceptance Criteria** ensuring quality and user satisfaction.

## 7. Conclusion – Project Planning Phase Summary

The **Project Planning Phase** established a clear and structured roadmap for developing the Educational Management System using ServiceNow.

By adopting the **Agile methodology**, the project team ensured flexibility, transparency, and iterative progress. The defined product backlog, user stories, and story point estimation provided clarity on workload and timelines, laying the foundation for a successful and efficient development phase.