

Project Planning Document

Date:	November 02, 2025
Team ID:	NM2025TMID05019
Project Name:	Calculating Family Expenses using ServiceNow
Maximum Marks:	5 Marks

1. Project Overview

Goal: Develop an automated ServiceNow application to calculate, manage, and report family expenses efficiently. The solution replaces manual tracking, reduces calculation errors, and provides real-time transparency.

Scope: Automate expense recording, link daily expenses to family-level summaries, and generate dashboards for insights.

Duration: 6 Weeks (Nov 04 – Dec 15, 2025)

Budget: ■0 (Academic Project)

2. Objectives & Success Criteria

Objective	KPI	Target
Automation	Expense aggregation accuracy	100%
Speed	Auto-calculation time	<3 seconds
Transparency	Visibility of daily & monthly data	Real-time
Usability	User satisfaction	>90%
Efficiency	Reduction in manual effort	80%
Scalability	Maximum entries handled	5,000+

In-Scope: Family and Daily Expense tables, Business Rules, Reports.

Out-of-Scope: External APIs or mobile extension.

3. Stakeholders

Role	Name	Responsibility
Sponsor	Project Guide / Faculty	Approval and evaluation
Project Manager	Kumar	Planning, design, tracking
ServiceNow Developer	Kumar	Configuration, scripting
Tester	Team Members	Functional and UAT testing
End Users	Family Members	Daily expense entry

4. Project Phases & Timeline

Phase	Start	End	Duration	Deliverables
Phase 1: Setup	Nov 04	Nov 10	1 week	Instance setup, tables
Phase 2: Automation	Nov 11	Nov 24	2 weeks	Business Rules, relationships
Phase 3: UI & Reports	Nov 25	Dec 08	2 weeks	Forms, dashboards
Phase 4: Review	Dec 09	Dec 15	1 week	Testing & submission

Total Duration: 6 weeks

Go-Live: Dec 15, 2025

5. Detailed Work Breakdown Structure (WBS)

Task ID	Task	Owner	Effort (hrs)	Dependencies
1.1	Instance setup and update set	Kumar	4	—
1.2	Create Family & Daily tables	Kumar	6	1.1

1.3	Add columns and relationships	Kumar	8	1.2
1.4	Configure auto-numbering	Kumar	4	1.3
2.1	Develop Business Rule	Kumar	10	1.3
2.2	Configure Related Lists	Kumar	6	2.1
2.3	Test Business Rules	Team	8	2.1
3.1	Create dashboards and reports	Team	6	2.3
3.2	Final documentation	Kumar	4	3.1
3.3	Presentation preparation	Team	4	3.2

6. Resource Plan

Resource	Role	Allocation	Cost
Kumar	Project Lead / Developer	100%	Academic
Team Members	Testers / Reviewers	50%	Academic
Faculty Guide	Reviewer	20%	Academic
ServiceNow Instance	Platform	—	Free

7. Communication Plan

Audience	Method	Frequency	Owner
Faculty / Guide	Review report	Weekly	Kumar
Team	Virtual meetings	Twice weekly	Kumar
End Users	Demo sessions	After completion	Team
Stakeholders	Status report	Weekly	Kumar

8. Risk Register

Risk	Probability	Impact	Mitigation	Owner
Business Rule error	Medium	High	Peer code review	Kumar
Data entry errors	Medium	Medium	Make fields mandatory	Team
Instance downtime	Low	Medium	Backup before changes	Kumar
Time constraints	Medium	Medium	Add 1-week buffer	Team

9. Conclusion

The Project Planning Document outlines the implementation of the ServiceNow-based Family Expense System. Kumar will lead the design, automation, and testing phases to ensure accurate and efficient expense tracking.