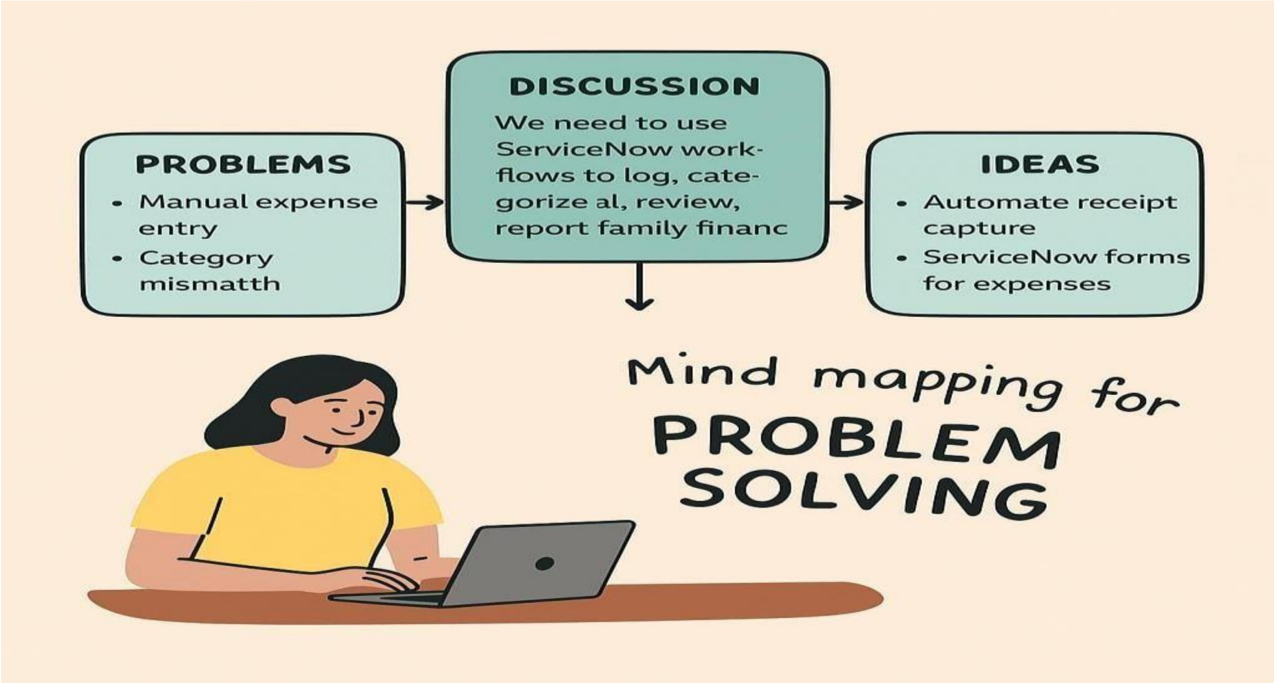
Ideation Phase
Brainstorm & Idea Prioritization

Date	31 OCT 2025
Team ID	NM2025TMID00063
Project Name	Calculating Family Expenses Using ServiceNow
Maximum Marks	4 Marks

Project Overview:
This guided project demonstrates how to build a basic, custom application on the ServiceNow platform to track, categorize, and report on family or personal expenses. It will leverage core ServiceNow functionalities, such as custom tables, forms, and reporting, to provide a centralized and structured system for budget management. The final solution will help users identify spending patterns and enforce budget limits.

Step-1: Team Gathering, Collaboration and Select the Problem Statement

Section	Description
PROBLEMS	* Family expenses are often tracked across disparate tools (spreadsheets, paper, banking apps), leading to fragmented data. * Difficulty in generating consolidated reports to identify monthly or annual spending trends. * Lack of a unified system to apply and track budget limits for different categories (e.g., groceries, utilities, entertainment).
DISCUSSION	The goal is to leverage ServiceNow's reliable database and reporting engine to create a simple, secure, and accessible single source of truth for all household financial data. This requires building a custom application with clear expense categories and automated reporting.
IDEAS	* Plan to create a custom table (u_family_expense) to store transaction details. * Define key fields: Date, Amount, Category (choice list), Paid By (reference to user), and Description. * Build a simple reporting dashboard to show spending by category month-over-month.
SOLUTIONS	* Develop and test the custom table and form layout. * Implement a simple monthly budget reporting feature (e.g., a report showing total spending vs. a fixed target value). * Deploy the application for family use and gather feedback for category refinement.



Step-2: Brainstorm, Idea Listing and Grouping

Key Requirements & Ideas:

Feature	Idea Listing	Grouping	Action Planning
Data Structure	Create a master table for Expenses and a separate table for Categories (Food, Rent, Bills).	**Database Modeling**	Define fields (Date, Amount, Category, Description). Establish relationship between Expense and Category tables.
User Experience	Design a simple, mobile-friendly input form for quick logging of new expenses.	**User Interface (UI)**	Use a simple form view. Implement mandatory fields (Amount, Date, Category).
Reporting	Build reports to calculate total spending per category. Add a gauge showing "Remaining Budget" based on a monthly target.	**Analytics & Reporting**	Create a Scheduled Report to email a weekly spending summary. Build a dashboard with Category donut charts.
Automation	Set up a Business Rule to flag transactions over a predefined "Large Expense Threshold" (e.g., $500) as high-priority.	**Platform Logic**	Write a simple Server- Side script (Business Rule) on insert/update of the expense table.

Step-3: Idea Prioritization

The main goal is to establish **Data Integrity** and provide **Visual Clarity** on spending.

Priority No.	Action	Core Goal
01	**Identify Core Expense Categories:** Define a simple, necessary list (e.g., Housing, Groceries, Transportation) before building the table.	Maintain Data Integrity
02	**Lock Data Input:** Ensure all necessary data (Amount, Category) is captured before saving.	Lock Deletion Actions (Prevent incomplete data)
03	**Maintain Data Integrity:** Use a Choice List or Reference Field for the **Category** field to ensure consistent spelling and grouping.	Maintain Data Integrity
04	**Notify Stakeholders:** Set up a simple notification when an expense is logged (e.g., email confirmation).	Notify Administrators (Family Members)
05	**Provide Override Mechanism:** Allow a dedicated 'Admin' user (e.g., the primary budget holder) to modify or delete entries.	Provide Override Mechanism
06	**Sync Spending Status:** Calculate a Monthly Total field dynamically based on all expenses logged so far.	Sync Incident Status (Sync Spending Status)
07	**Promote Sharing:** Share the dashboard link with all family members for transparency.	Promote Sharing

Idea Prioritization:

Idea prioritization here helps us break down the custom application development into clear, functional components. We first focus on the database structure (u_family_expense table) to ensure reliable data storage. Only oncthee data is correctly structured do we move onto the reporting and automation layers. This approach ensures that the foundation of the budget tracker is robust before adding analytical features. Clear visual representations on the dashboard will simplify communication about financial health to all users.