

Ideation Phase

Brainstorm & Idea Prioritization

Template

Date	02 Nov 2025
Team ID	NM2025TMID04665
Project Name	Calculating Family Expenses Using ServiceNow
Maximum Marks	4 Marks

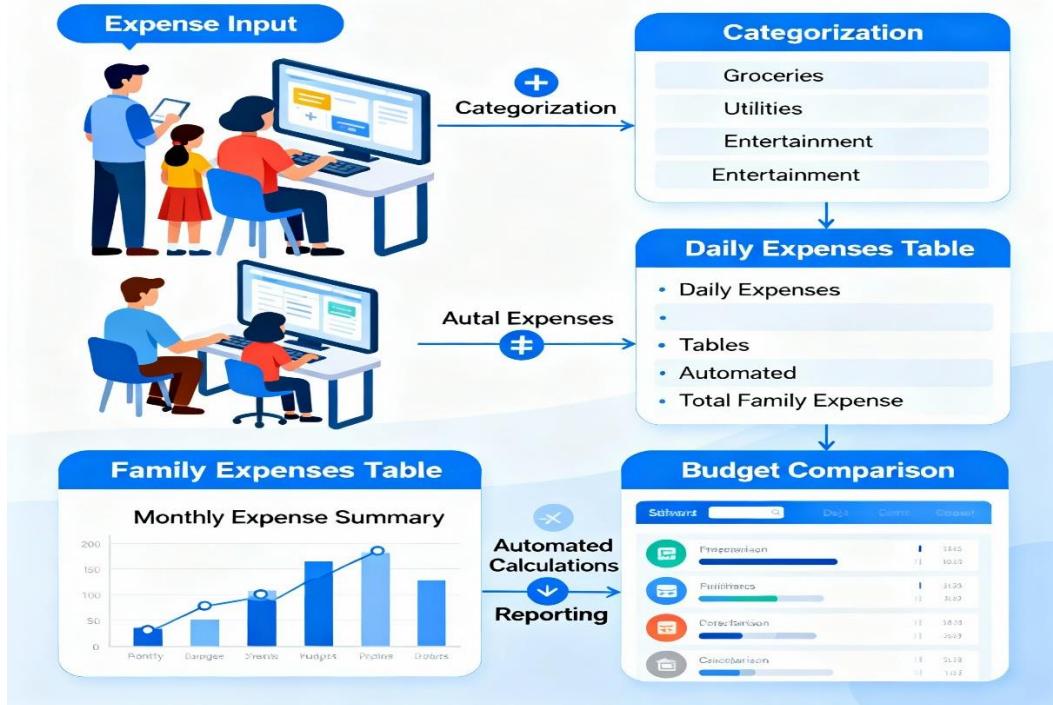
This guided project demonstrates how to develop a comprehensive family expense management system using ServiceNow. It begins by setting up a ServiceNow developer instance and creating update sets to manage configurations. Two core tables, Family Expenses and Daily Expenses, are created to store summarized and individual expense data respectively. Auto-numbering and form customization ensure data integrity and ease of use. Relationships and business rules are implemented to automate the calculation of total family expenses based on daily entries, ensuring accurate and real-time updates. The workflow also includes refining query logic to display linked daily expenses under each family expense record for clarity.

By automating expense tracking and categorization, this project helps families efficiently manage their finances, promotes transparency, and supports informed financial decisions. The system's design emphasizes user-friendly interfaces, data validation, and seamless data integration between related records.

This approach demonstrates the power of ServiceNow to streamline financial management processes within a family unit while reducing manual effort and errors.

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

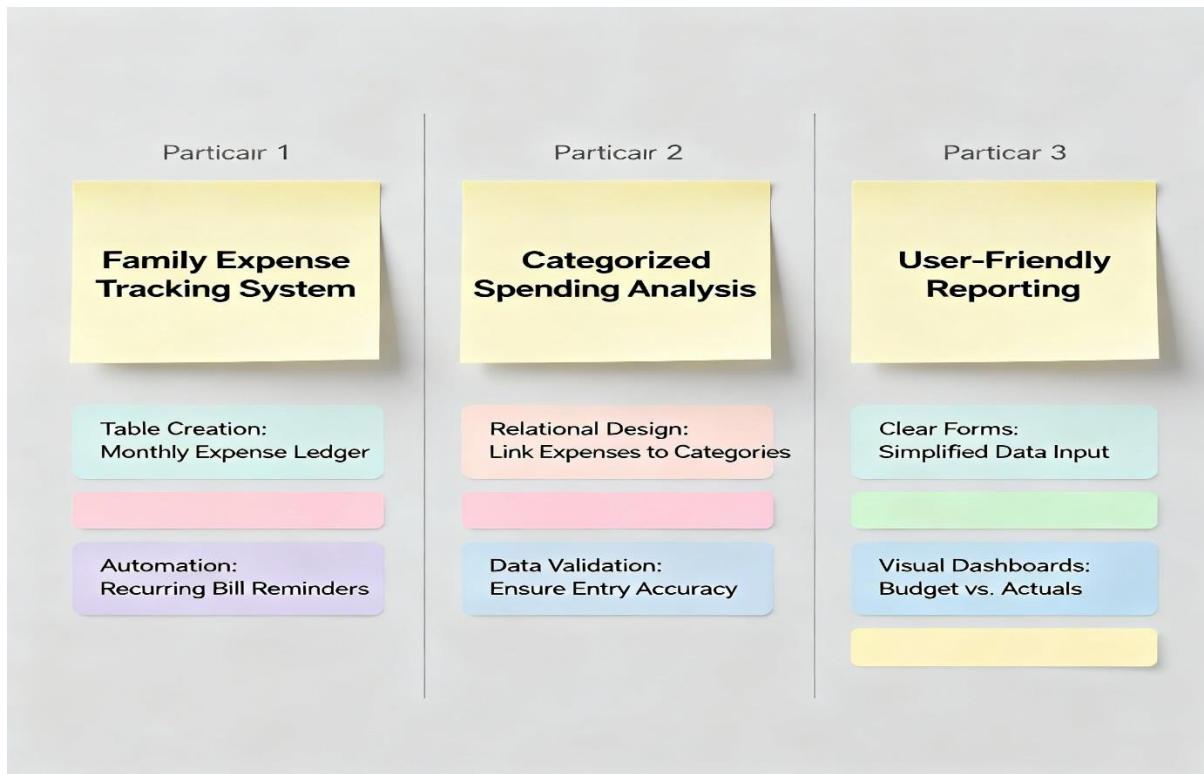
Enable families to efficiently track, categorize, and analyze their spending using a ServiceNow-based expense management system. The solution should support automated calculations, categorization, and reporting for both total and individual expenses.



Step-2: Brainstorm, Idea Listing and Grouping:

Team Gathering

The team worked together to select the problem statement, share ideas, and agree on system functionalities.



Brainstorm/Idea Listing

- Build tables to store daily and family expenses.
- Automate total expense calculation for each day.
- Categorize expenses and link individual expenses to overall totals.
- Use auto-numbering and maintenance for record management.
- Display related daily expenses under each family expense record.
- Implement business rules for automation.
- Create clear and user-friendly forms.

Grouping & Action Planning

Ideas were grouped into:

- Table creation and design
- Automation (business rules)
- Relational design (linking daily and family expenses)
- Data entry and validation (mandatory fields)

Actions assigned and timeline set for each stage.

3. Idea Prioritization

- Prioritize automation of daily expense totaling.
- Ensure forms are easy to use and fields are validated.
- Focus on linking records for clarity and reporting.
- Use diagrams to represent system relationships and workflows.

