



Project Planning Phase

1. Purpose of the Planning Phase

The **project planning phase** defines the **scope**, **timeline**, **resources**, and **tasks** required to successfully develop the Family Expense Tracking System using **ServiceNow**. This phase ensures that all activities are structured, organized, and aligned with the project's goals.

2. Project Scope

The project aims to develop a **custom ServiceNow application** that:

- Records and manages all family expenses.
 - Categorizes expenses (e.g., rent, groceries, utilities, etc.).
 - Generates monthly and category-wise expense reports.
 - Displays expenses in **graphical charts** for better understanding.
 - Allows the administrator (Anjali) to oversee all transactions.
-

3. Objectives

- To design a **user-friendly ServiceNow app** for tracking expenses.
 - To build **forms, tables, and workflows** for recording expenses.
 - To implement **automated calculations** of total and category-wise expenses.
 - To design **reports and dashboards** for visualization and analysis.
 - To test and ensure **system performance** and reliability.
-

4. Roles and Responsibilities

Role	Responsibility
Administrator (Anjali)	Create tables, workflows, and dashboards in ServiceNow.
User (Family Members)	Enter expense data using forms.
Developer/Tester	Design and test forms, reports, and automation logic.

5. Project Modules

1. **User Module:**
 - Add and view expenses.
 - Enter details like Date, Category, Amount, and Description.
 2. **Admin Module:**
 - Manage categories and users.
 - View overall expense summary and reports.
 3. **Database Module:**
 - Store all expense details in a custom ServiceNow table.
 4. **Report & Dashboard Module:**
 - Display total expenses using pie charts and graphs.
-

6. Resources Required

- **Software:** ServiceNow platform
 - **Hardware:** Computer system with internet access
 - **User Accounts:** Administrator & family member accounts
 - **Skills Needed:** ServiceNow administration, form creation, reporting, and JavaScript scripting
-

7. Project Timeline

Phase	Duration	Deliverables
Ideation	1 Week	Idea proposal and project concept
Planning	1 Week	Detailed plan and requirements
Design	2 Weeks	Database and form design
Implementation	2 Weeks	Working ServiceNow application
Testing	1 Week	Bug-free, functional project
Final Report	1 Week	Documentation and presentation

8. Risk Management

Possible Risk	Mitigation Strategy
Data entry errors	Implement input validation and mandatory fields

Possible Risk	Mitigation Strategy
Budget data overload	Use filters and pagination for reports
Incomplete entries	Use ServiceNow form rules for validation
Performance issues	Optimize scripts and limit report queries

9. Expected Outcomes

- A well-organized ServiceNow-based expense tracker.
- Accurate and automated monthly expense summaries.
- Graphical visualization for better financial insights.
- Simplified management for the administrator and users.

10. Deliverables

- ServiceNow custom app (Expense Tracker).
- Database table for storing expenses.
- Reports and pie chart visualizations.
- Documentation (screenshots, workflow diagrams, and user guide).