



# 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.

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## 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.

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## 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.

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## 4. Roles and Responsibilities

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

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## 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.
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## 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
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## 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

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## 8. Risk Management

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

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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

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## 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.
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## 10. Deliverables

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