

Project Planning Phase — calculating family expenses using (Service Now)

Date	1-11-2025
Team id	NM2025TMID05401
Project name	Calculating Family Expenses using service now
Team member	4

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1. Project Overview

Project Title:

Calculating Family Expense using ServiceNow

Objective:

To design and implement an automated system on ServiceNow that helps families **track**, **calculate**, and **forecast** expenses, with **real-time alerts**, **automated totals**, and **reward/referral systems** for engagement.

Goal:

Provide a **centralized, intelligent, and user-friendly platform** for families to manage budgets, monitor spending, and receive actionable insights — reducing manual effort and improving financial awareness.

2. Project Scope

In-Scope (What will be built)

1. **Expense Management Module** – Add, update, and categorize family expenses.
2. **Automated Totals & Budget Tracking** – Real-time total calculation via Flow Designer.
3. **Automated Alerts System** – Notifications for budget thresholds, approvals, and summaries.
4. **Referral & Reward System** – Generate referral links and update rewards automatically.
5. **Dashboard and Reports** – Visualization of expenses, trends, and forecasts.
6. **AI-Powered Forecasting** – Predict next month's expenses using historical data.
7. **Role-Based Access** – Different views for parents, members, and children.

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Out of Scope (Not in current phase)

- Integration with external banking APIs.
- Multi-currency support.
- Third-party payment processing.
- Voice assistant integration (future enhancement).

3. Deliverables

Phase	Deliverable	Description
Initiation	Project Charter	Defines purpose, goals, stakeholders.
Planning	System Design Document	Architecture, data model, flow diagrams.
Development	Configured ServiceNow Modules	Tables, flows, notifications, and UI pages.
Testing	Test Cases & Reports	Functional, integration, and performance testing results.
Deployment	Live Demo / Instance	Working ServiceNow app instance.
Closure	Project Report & Presentation	Documentation and outcomes summary.

4. Stakeholders and Roles

Role	Responsibility
Project Manager (You / Team Lead)	Oversees project schedule, risks, and delivery.
ServiceNow Developer	Builds tables, flows, forms, and UI policies.
Business Analyst	Gathers requirements and creates user stories.
Tester / QA	Conducts unit, functional, and performance tests.
End Users (Family Members)	Use the system, provide feedback.
Supervisor / Faculty Guide	Reviews project progress and validates deliverables.

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5. Functional Modules

Module	Description	Tools / ServiceNow Features
Expense Tracker	Add and manage family expenses.	Tables, forms, Flow Designer
Automated Totals	Auto-calculation of total spending and per-category totals.	Flow Designer, Business Rules
Budget Alerts	Sends alerts for overspending or high expenses.	Notifications, Email Templates
Referral & Rewards	Generates referral links and adds reward points.	Custom Tables + Flow Designer
AI Forecasting	Predicts next month’s expenses.	ServiceNow Predictive Intelligence / Scripted ML
Dashboard	Visual summary of totals, alerts, and referrals.	Performance Analytics Widgets

6. Project Timeline (Gantt-Style Breakdown)

Phase	Tasks	Duration
Week 1 – Initiation	Define objectives, gather requirements, identify stakeholders.	1 week
Week 2 – Planning	Design architecture, create data model, define flows.	1 week
Week 3–4 – Development	Configure tables, relationships, forms, and Flow Designer automations.	2 weeks
Week 5 – Testing	Conduct unit, functional, and performance testing.	1 week
Week 6 – Deployment & Demo	Deploy app to ServiceNow instance and prepare presentation.	1 week
Week 7 – Project Closure	Collect feedback, document lessons learned, finalize report.	1 week

Total Duration: 6–7 weeks (adjustable for academic project cycles).

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7. Resource Planning

Resource	Description	Tool / Platform
ServiceNow Instance	Platform for development and automation.	ServiceNow Developer Instance
Development Tools	For flow automation, notifications, dashboards.	Flow Designer, Notification Engine
Testing Tools	For validating functionality and performance.	ServiceNow Test Management / Manual Testing
Data Sources	Sample family expense data for testing.	Excel / CSV imports
AI / ML Model (Optional)	For expense forecasting.	Predictive Intelligence (ServiceNow)

8. Risk Management

Risk	Impact	Mitigation Strategy
Delay in requirement clarity	Medium	Frequent review meetings with users.
Performance issues due to data volume	High	Conduct load testing; optimize queries.
Incomplete testing coverage	Medium	Create detailed test cases and track results.
Feature creep	Medium	Follow approved scope and change control.
Lack of ServiceNow permissions	Low	Ensure proper instance roles and ACL setup.

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9. Testing Plan (Overview)

Test Type	Purpose	Tools / Techniques
Unit Testing	Verify each module (expenses, alerts, totals).	Manual testing in dev instance.
Integration Testing	Validate workflows between modules.	Flow simulation in ServiceNow.
Performance Testing	Check response time, data load capacity.	Test with 500+ records.
User Acceptance Testing (UAT)	Ensure system meets user needs.	Real user scenarios.
Regression Testing	After updates, ensure old features work.	Automated scripts (optional).