Project Planning Template

Date	28 June 2025
Team ID	LTVIP2025TMID60720
Project Name	Calculating Family Expenses Using Service Now
Maximum Marks	5 Marks

Project Planning: Calculating Family Expenses Using ServiceNow

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🎯 Project Objective

To design and develop a custom ServiceNow-based application that helps families manage and monitor their monthly expenses with automation, reporting, and alerting features.

🛠️ Project Phases & Timeline

Phase	Activities	Timeline
1. Requirement Gathering	- Identify user roles (Admin, Family Member) - Define key features and use cases	1 hour
2. Ideation & Design	- Empathy map, brainstorming - Design UI forms and dashboards - Data model planning	1 hour
3. Development – Phase 1	- Build expense form - Configure tables (u_expense_records, etc.) - Implement basic role access	1 hour
4. Development – Phase 2	- Budget setting module - Flow Designer for alerts - Report and dashboard creation	1 hour

Phase	Activities	Timeline
5. Testing & QA	- Functional testing - Role-based access testing - Validate reports/notifications	1 hour
6. Deployment & Training	- Deploy on ServiceNow instance - Provide user guide/training for Admin and Family Members	1 hour
7. Feedback & Optimization	- Collect feedback - Fix bugs - Implement small enhancements	1 hour

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👤 **Team Roles & Responsibilities**

Role	Responsibility
Project Manager	Oversee planning, timelines, and team coordination
ServiceNow Developer	Build forms, workflows, tables, and logic in ServiceNow
UX Designer	Design user-friendly forms and dashboards
QA Tester	Perform end-to-end testing and verify alerts/report accuracy
Trainer/User Support	Help onboard family users and document the app usage

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📈 **Milestones**

1. ✅ **Setting up ServiceNow Instance**

2. ✅ **Creation of New Update Set**

3. ✅ **Creation of Table**

4. ✅ **Creation of Table(Daily Expenses)**

5. ✅ **Creation of Relationship**

6. ✅ **Configuring Related List on Family Expenses**

7. ✅ **Creation of Business Rules**

8. ✅ Configure the Relationship

9. ✅ Conclusion

⚠️ **Risks & Mitigations**

Risk	Mitigation Strategy
Complexity in customizing workflows	Use ServiceNow Flow Designer and scripting best practices
User confusion with role access	Provide simple UI and user training
Budget tracking logic may be inaccurate	Conduct thorough test cases with sample data