Project Planning Phase

Date: 02 NOVEMBER 2025
Team ID: NM2025TMID07649
Project Name: Calculating the Family Expenses in ServiceNow

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1. Overview

The Planning Phase is the most crucial stage in the project life cycle, as it transforms the conceptual idea into a well-defined execution roadmap. The "Calculating the Family Expenses using ServiceNow" project aims to design and deploy an automated expense management system leveraging ServiceNow's workflow automation, data storage, and reporting capabilities.

This system will simplify how families record, categorize, and monitor their monthly expenditures by offering a digital platform that ensures transparency, accuracy, and insightful financial analytics.

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2. Project Objectives

The primary goals of this project are:

1. **Automation:** To automate the manual process of expense tracking through ServiceNow's form submissions and workflow logic.
2. **Centralization:** To maintain a unified, secure, and accessible system for all family financial records.
3. **Visualization:** To generate real-time dashboards and analytical reports for better budgeting and savings planning.
4. **Efficiency:** To reduce redundancy and human error by implementing data validation and workflow approvals.
5. **Scalability:** To create a flexible model that can be expanded to include income tracking, investment monitoring, and predictive expense analysis in the future.

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3. Project Scope

In Scope:

- Designing ServiceNow tables for categorizing expenses (utilities, groceries, bills, transport, healthcare, etc.).
- Building user-friendly forms for family members to input expenses.
- Developing workflows for data validation and approval (optional for joint expense verification).

- Configuring dashboards and reports for real-time financial tracking.
- Setting up role-based access control (parents, children, etc.).
- Conducting testing and documentation of all system modules.

Out of Scope:

- Third-party financial integrations (e.g., linking to bank accounts or credit cards).
- AI-based predictive analysis or forecasting in this phase.
- Mobile app development (limited to web ServiceNow instance).

4. Detailed Deliverables

Deliverable	Description	Expected Output
Requirement Specification Document (RSD)	Detailed listing of user stories, functional and non-functional requirements	Approved document baseline
System Design Document (SDD)	Workflow diagrams, data model, and UI mockups	Design blueprint
ServiceNow Table Configuration	Database tables for expense storage and relationships	Working data schema
Forms and UI Components	Data input interfaces for family users	Functional forms in ServiceNow
Automated Workflow Logic	Business rules and flows for approvals	Approved and tested workflows
Dashboard and Reporting	Visual summary of spending by category and time period	Dynamic, filterable reports
User Role Configuration	Security and access setup	Access hierarchy implemented
Testing & QA Report	Test cases and results	Validation of system performance
Final Project Documentation	Consolidated project summary	Deployment-ready system

5. Resource Planning

Human Resources

Role	Responsibilities
Project Manager	Oversees entire project lifecycle, ensures milestone completion
Business Analyst	Gathers requirements, defines functional specifications
ServiceNow Developer	Develops modules, workflows, and reports
UI/UX Designer	Designs intuitive interfaces for forms and dashboards
QA Tester	Conducts testing, validates requirements, reports bugs
End Users (Family Members)	Provide feedback and assist in user acceptance testing (UAT)

Technical Resources

- ServiceNow Developer Instance (cloud environment)
- Workstation with web access
- Access to documentation tools (MS Word, Excel, Lucidchart, etc.)
- Communication tools (Microsoft Teams / Slack / ServiceNow ChatOps)