

SN INNOVATORS

Innovating ServiceNow Solutions for Tomorrow



About us

SN Innovators is a digital solutions firm specializing in ServiceNow implementations, automation, and IT workflow optimization. With a strong focus on innovation and ROI-driven delivery, we empower enterprises to streamline processes and enhance service experiences.

Vision:

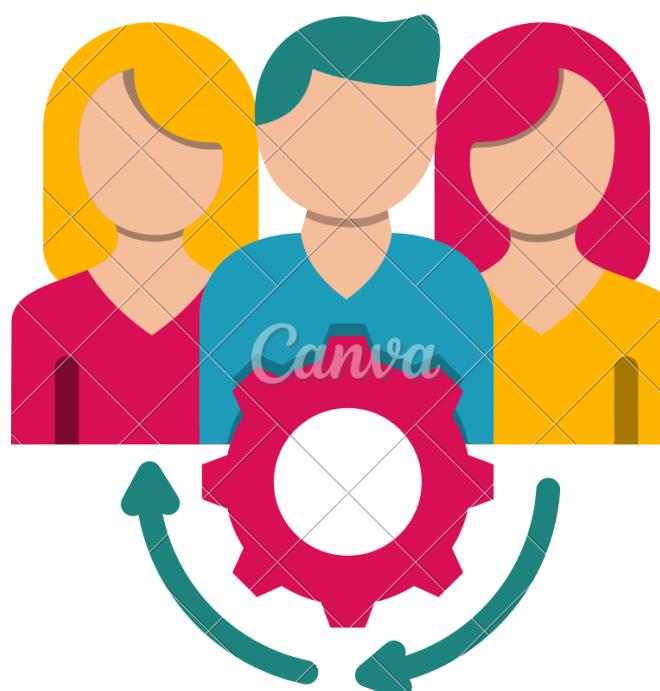
To build intelligent digital workflows that drive operational excellence and empower employees through automation.

Mission:

To deliver innovative ServiceNow solutions that increase transparency, compliance, and turnaround speed in every financial workflow.

Roles

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Roles	Name
Project Manager	Sweta Sonulkar
Business Analyst	Mercy Emuobosa
Developers	Mannat Kaur, Arlesha Moore, Prashant Gupta
QA	Melvin Ejiogu

RACI Matrix – SmartClaim Project



	Task / Phase	Project Manager (PM)	Business Analyst (BA)	Developer	QA Engineer	HR Manager	Finance User	End Users
1	Requirement Gathering	A	R			C	C	I
2	Workflow Design	A	R	C		C	C	I
3	Development & Configuration	C	C	R, A				I
4	Testing (Functional + UAT)	C	C	C	R, A	C	C	I
5	Approval Rule Implementation	C	R	R		A	A	I
6	Notifications Setup	C	R	R		C	C	I
7	Performance & Compliance KPIs	C	R		C	C	A	I
8	Go-Live & Rollout	A	R	R	R	I	I	C
9	Training & Communication	A	R			C	C	R
	Ongoing Support	A	R	R		C	C	I

R = Responsible (does the work)

A = Accountable (owns the outcome)

C = Consulted (provides input)

I = Informed (kept in the loop)



SmartClaim Project Overview

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Executive Summary

The SmartClaim Reimbursement Manager will enable employees to easily submit claims, managers to validate them based on pre-set policies, and finance teams to seamlessly add approved amounts to payroll. The app emphasizes transparency, compliance, and operational efficiency.

Project Scope

The project will entail a web-based tool for internal purposes which will enable employee claim submission with receipt upload when necessary. Manager approval/rejection will be based on automated workflow chains will trigger around it.

Finance dashboard for exporting claims

Project Objectives

- Reduce time spent on manual claim processing 50%.
- Improve compliance with internal reimbursement policies.
- Increase employee satisfaction with reimbursement transparency.

Business Case / Justification

Problem Addressed:

Manual claim processing often results in errors, delays, policy violations, and lack of audit trails.

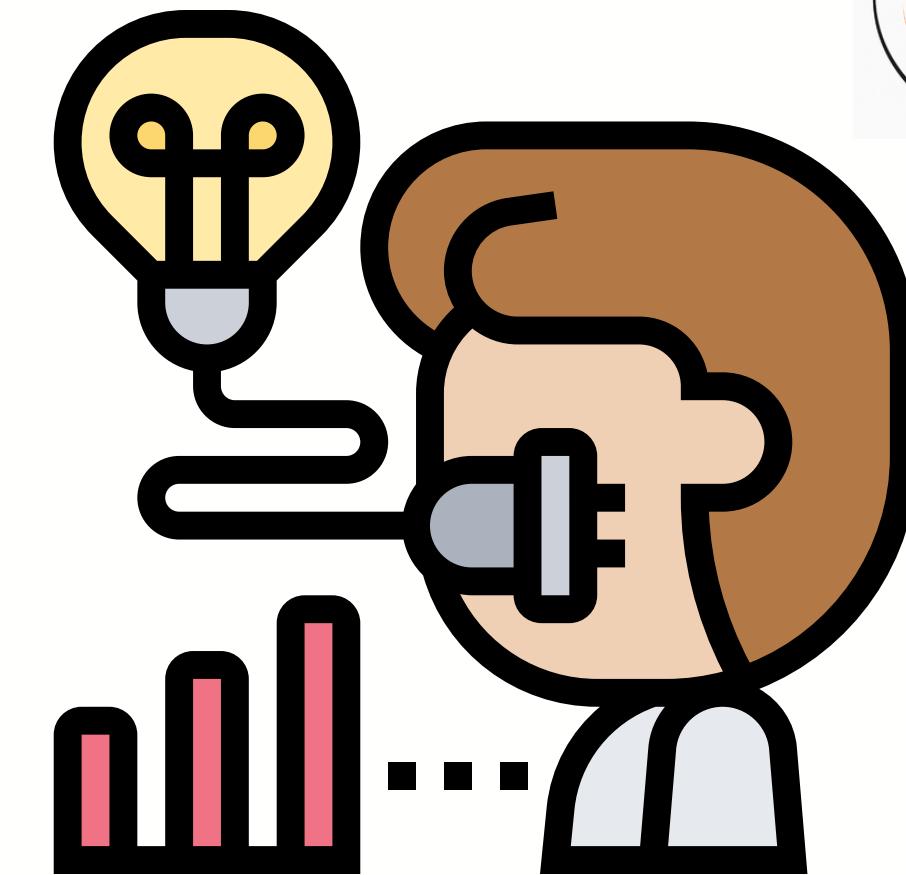
Employees and finance teams struggle with inconsistent submissions, missing receipts, and approval chains.



Installed Plugins & Configuration



- Enabled Plugins:
 - Project Portfolio Management (PPM)
 - Agile Development 2.0
 - Financial Planning
 - Resource Management
 - Performance Analytics
- Installed via System Definition > Plugins



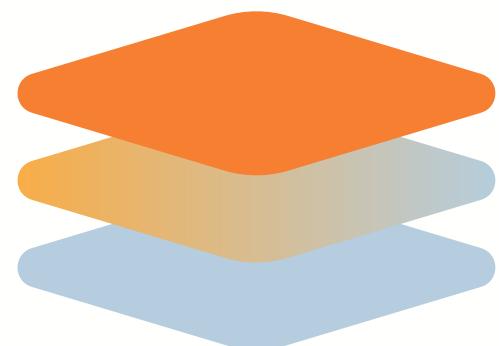
Technology Stack:

Platform: ServiceNow (App Engine Studio)

Core Features: Record Producers, Flow Designer, Custom Tables, Notifications, Client Scripts, GlideRecord

User Interface Elements: Dynamic Forms, Conditional Fields, Validations

Dashboards & Reporting: Platform Analytics, UI Builder



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Project Overview



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Project Tasks Summary

Project Management Summary

May 2025

Project Tasks Summary

Kickoff Setup	100%
Requirement Gathering	100%
Development	100%
Testing	100%
UAT	100%
Production	

Key Requirements

Submit Reimbursement	Approved
Approved by Finance	451 Internal
Validate Attachments-20	Pending

Agile Phases Overview

Kickoff Setup	72 hours planned	36%
Requirement Gathering	100%	
Development	100%	
Testing	100%	
UAT complete		100%

Epics Overview

Claim Submission	Walk-in process
Approvals Workflow	Automated
Notifications	Built
UAT & Deployment	Done
Stakeholders Overview	
Nancy Emblaze	Supportive
Sviola Sandler	Neutral
Phil Hood	Neutral
Finance User	Loaning



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- Planned Cost: \$69,500
- Capital Target: \$21,200
- Operating Target: \$48,300
- ROI Expected: 22%

- Tools Used**
- Financials > Budget
 - Related Lists: View Baseline

Resource & Cost Plan

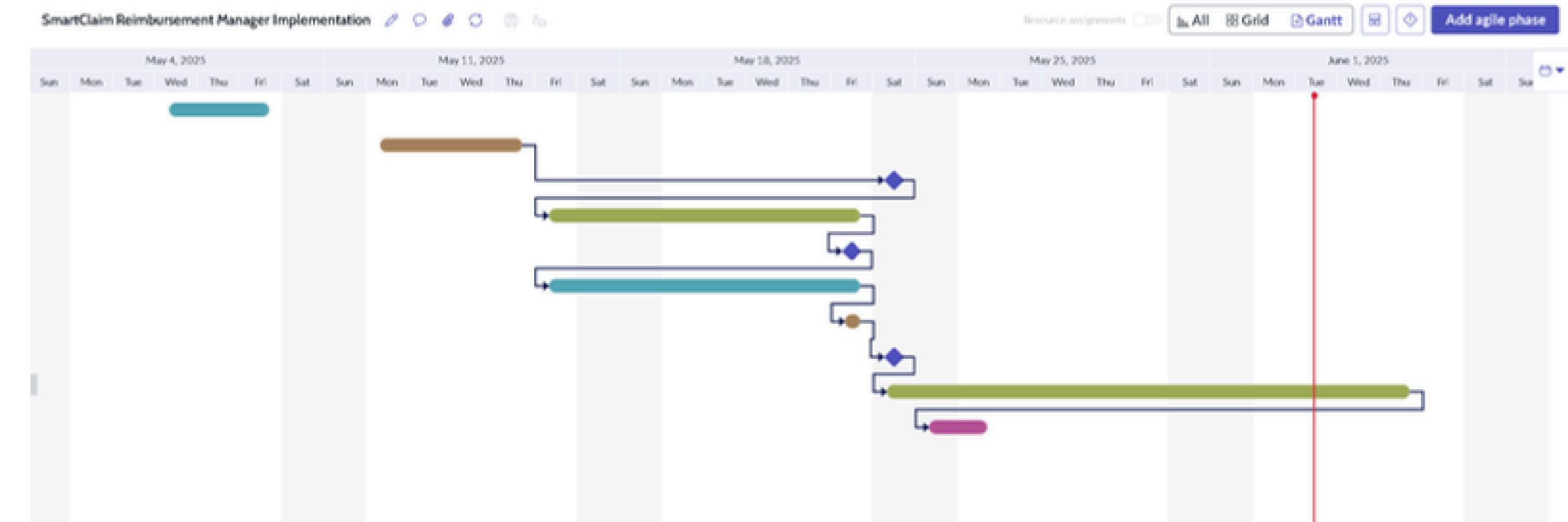
- Team Members: PM, BA, Developer, QA
- Total Resource Cost: \$9,000
- Cost Planning: Resource Plans > New Plan
- Status: Allocated



Gantt Chart

Gantt Chart (Timeline)

Key Dates: 2025-05-12 to 2025-06-05



Success Criteria

Expected Results & Metrics



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90%

User adoption rate within 30 days post-launch

0%

Zero policy violations in approved claims

75%

Seamless task tracking

80%

High user satisfaction based on post-launch surveys

Analytics and Dashboards



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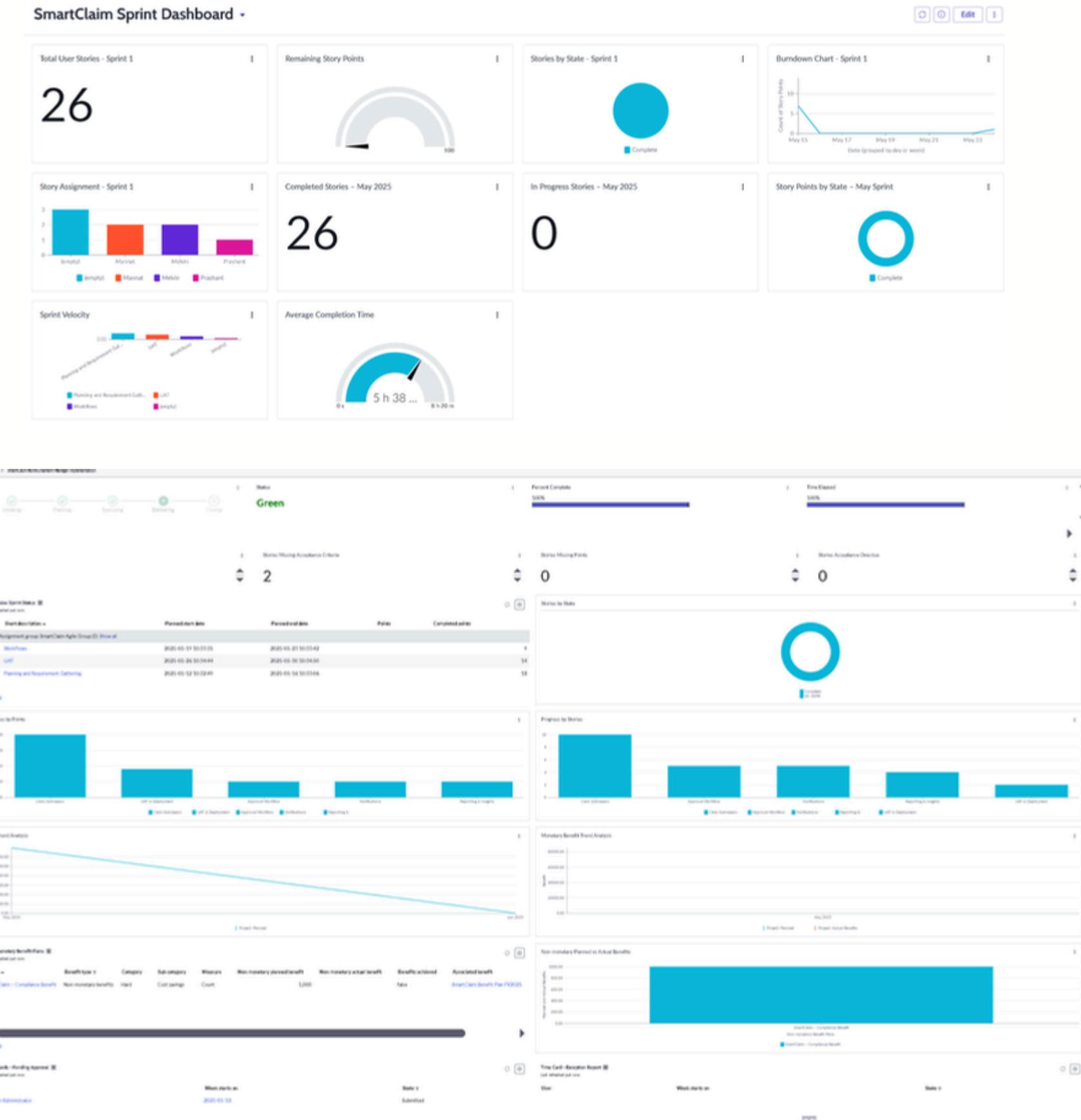
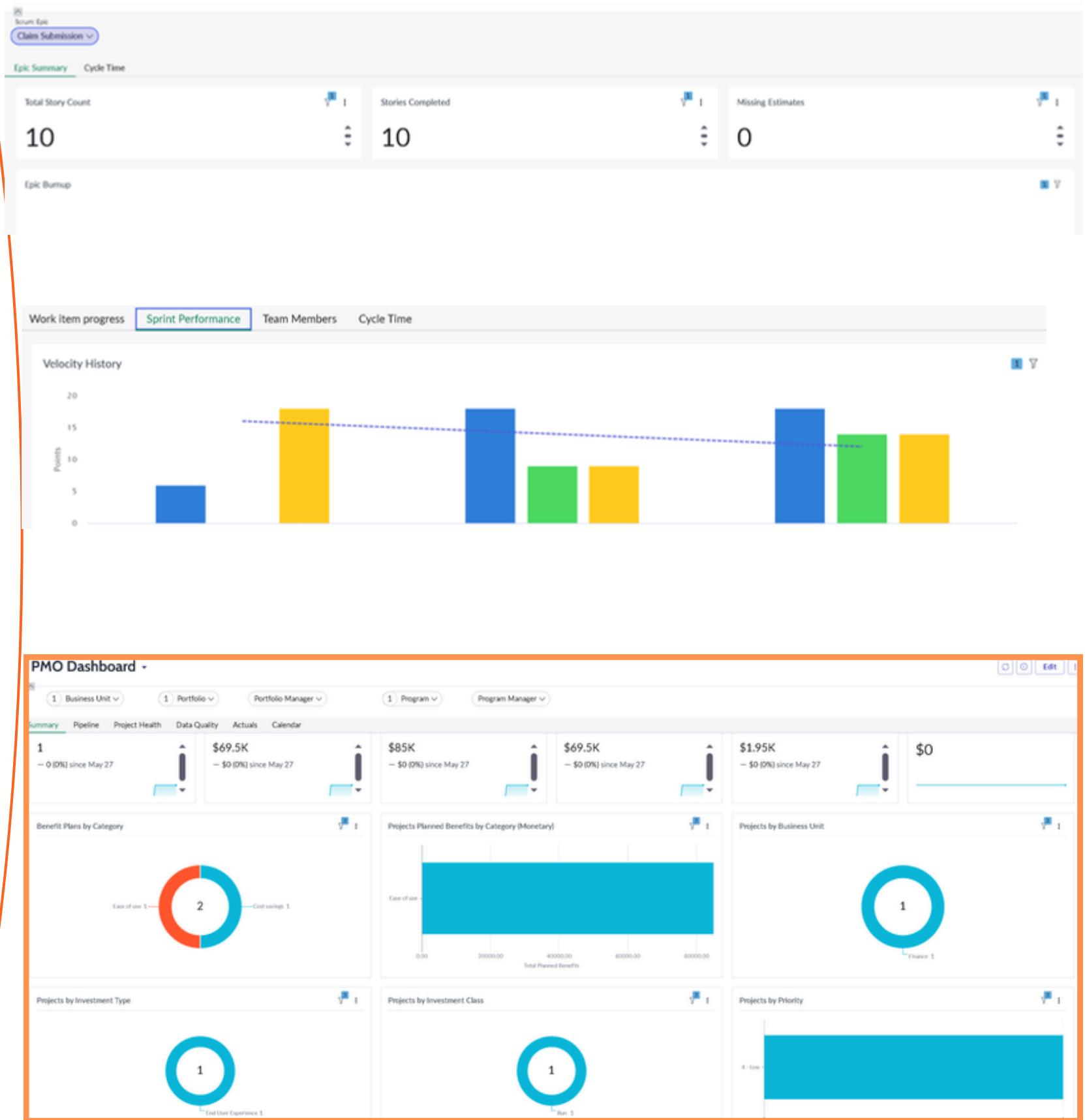
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RIDAC Summary – SmartClaim Project

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🔍 Risk Resolved: Users Validation

Owner: Prashant Gupta

Solution: Implemented client-side (UI Policy) and server-side (Business Rule) validations.

Work Note: Validations tested across UI and Service Portal; no bypass detected as of May 26.

🔔 Issue Resolved: Notifications Missed

Owner: Arlesha Moore

Solution: Fixed Flow Designer logic; validated notification delivery via audit logs.

Work Note: Email reminders and fallback escalation added.

📋 Decision Made: Scope Freeze After Sprint 1

Owner: Mercy Emuobosa

Summary: Scope officially frozen on May 22; communicated via status report and team meeting.

⚙️ Action Completed: Add Policy Threshold Fields

Owner: Mannat Kaur

Work Note: Threshold fields (e.g., max cap, min amount) added with visibility rules and validations.

🔄 Change Implemented: Add “Wellness” Claim Category

Owner: Mercy Emuobosa

Summary: “Wellness” added to claim categories in dictionary; implemented on May 25.

Business Needs

There is a clear need for a centralized, automated tool that simplifies claim submissions, enforces policy compliance, and integrates approved reimbursements into payroll workflows.

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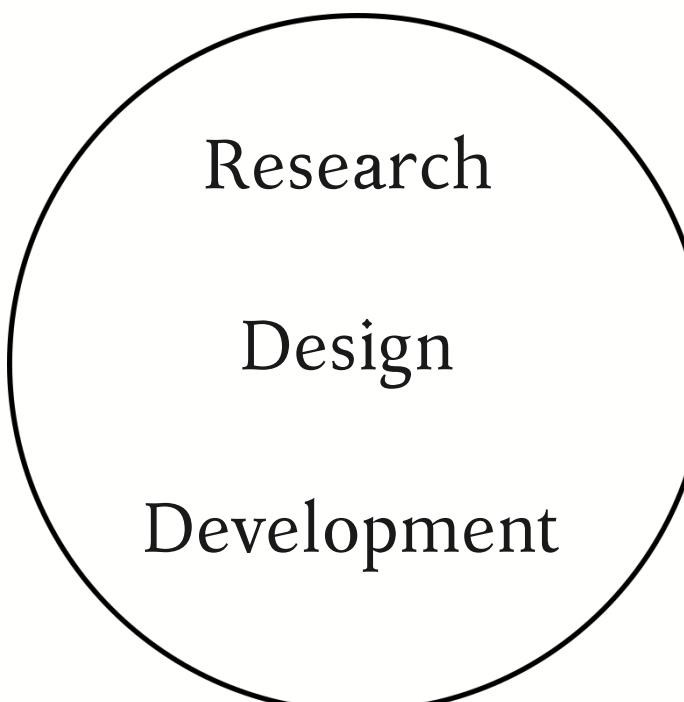
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**Business, Functional
and Non-Functional
Requirements**

Requirements



Requirement Deliverables in Action

Problem Statement & Checklists

Vision and Scope

User Stories

Acceptance Criteria

Epics, Features and Tasks

Behaviour-Driven Development Scenario

Task Flow

Application Architecture

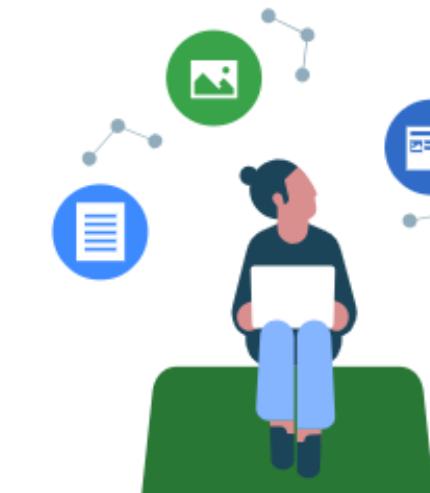
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Table: x_1763623_smartc_0_scm_reimbursement_request

Fields: Number, Employee, email, Status, Total Claim amount, attachment, Description,
Variables

Record Producer (AES)

Client scripts, UI Policy and Business rules



SmartClaim Reimbursement Form

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SmartClaim Reimbursement Manager

The Smart Claim Manager enables employees to efficiently and effectively submit claims for business-related expenses.



The SmartClaim Reimbursement Manager is designed to streamline the submission and approval process for associate expense reimbursements. Associates can use this form to submit detailed information and supporting documentation for business-related expenses. Once submitted, requests are automatically routed to the appropriate approvers for review and processing, ensuring a faster and more efficient reimbursement workflow.

Key Features:

- Easy-to-use interface for submitting expense details
- Attach receipts and supporting documents
- Automated routing for approval and processing
- Real-time status tracking of submitted claims

Use this form to ensure your company expenses are recorded, reviewed, and reimbursed promptly.

* Indicates required

Employee Details

* Employee	Prashant Gupta	Email	prashant.gupta@customizosolutions.com
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Expense Type and associated lists

* Expenses

Actions	Date	Type	Description	Amount
No data to display				

Total Claim Amount

Receipts and Additional Details

Additional Details

 Add attachments

Add Row

* Date ?
Provide the date expense occurred. x

* Type ?
Select the appropriate expense type. x

-- None --

Description

* Amount ?
Provide the expense amount. If the amount is more than \$20, please attach the expense receipt. x

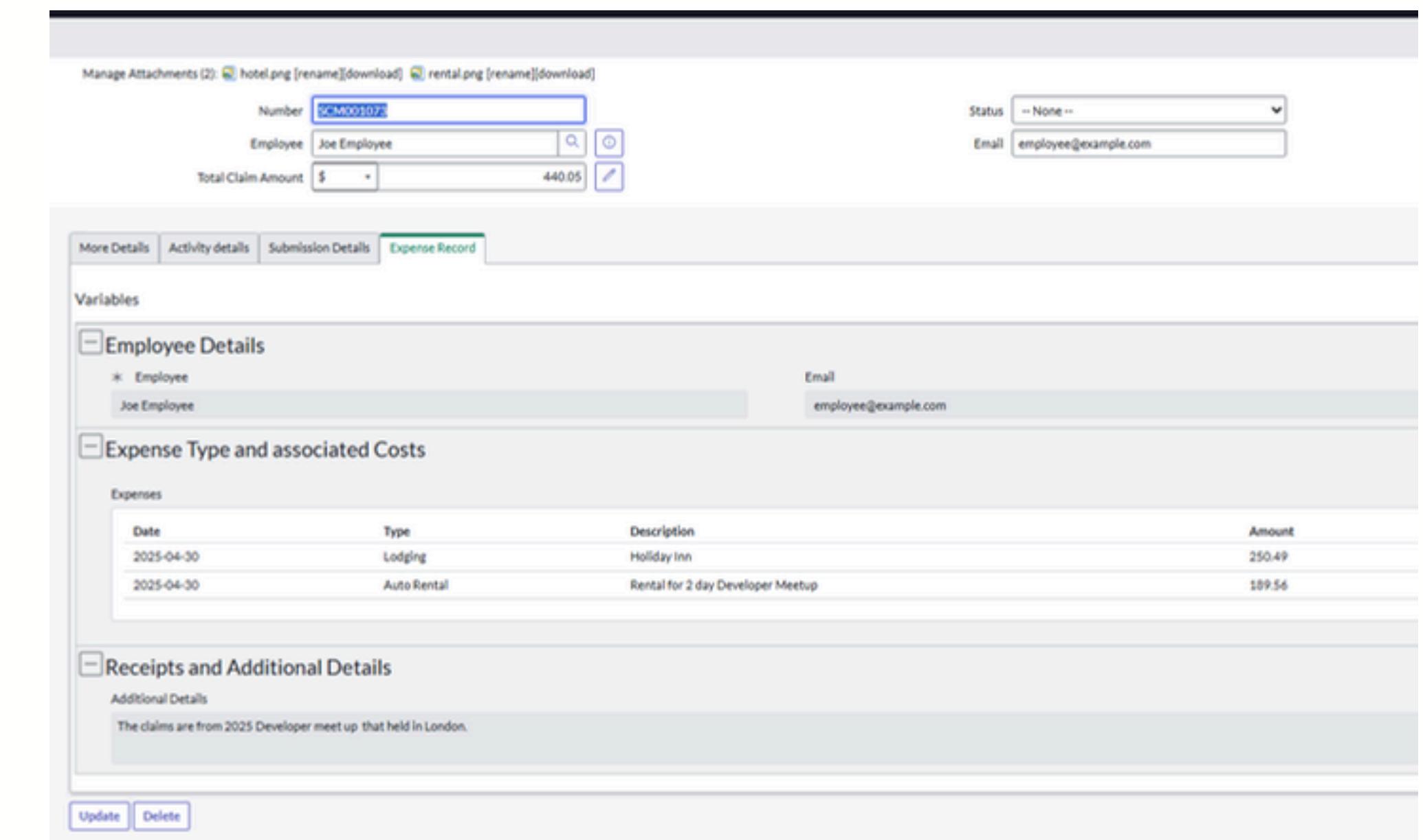
Cancel Add

Table: SCM Reimbursement Request***

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This scoped custom table stores each employee's reimbursement request, including claim amount, employee details, submission details such as claim type and date, and approval status.

Three Different Views
 → default
 ->User
 → Fulfillment



The screenshot displays three views of a reimbursement request form:

- Manage Attachments:** Shows attachments named hotel.png and rental.png.
- Number:** SCM00102.
- Employee:** Joe Employee.
- Total Claim Amount:** \$440.05.
- Status:** --None--.
- Email:** employee@example.com.

User View:

- Variables:**
 - Employee Details:** Employee: Joe Employee, Email: employee@example.com.
 - Expense Type and associated Costs:**

Date	Type	Description	Amount
2025-04-30	Lodging	Holiday Inn	250.49
2025-04-30	Auto Rental	Rental for 2 day Developer Meetup	189.56

Fulfillment View:

- Receipts and Additional Details:**
 - Additional Details:** The claims are from 2025 Developer meet up that held in London.



Notifications



Notifications via Email are set to send to requester to update on their request

- On Submission
- On Manager Approval or Rejection
- On Completion (if approved by Manager or auto-approved)
& Manager to request approval

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Hi Mannat,

Your request has been successfully submitted : SCM001160. Please wait while it get processed.

Thank you

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Hi Fred,

You have new claim request over \$100 to review and approve.

If need further details please contact Mannat Kaur at mannat.kaur@customizosolutions.com.

Thank you



Hi Prashant Gupta,

Your claim Request SCM001165 is auto-approved.

Thank you

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Hi Christian Marnell,

Your claim request SCM001167 has been completed. Your claim amount will be applied to your next pay period.

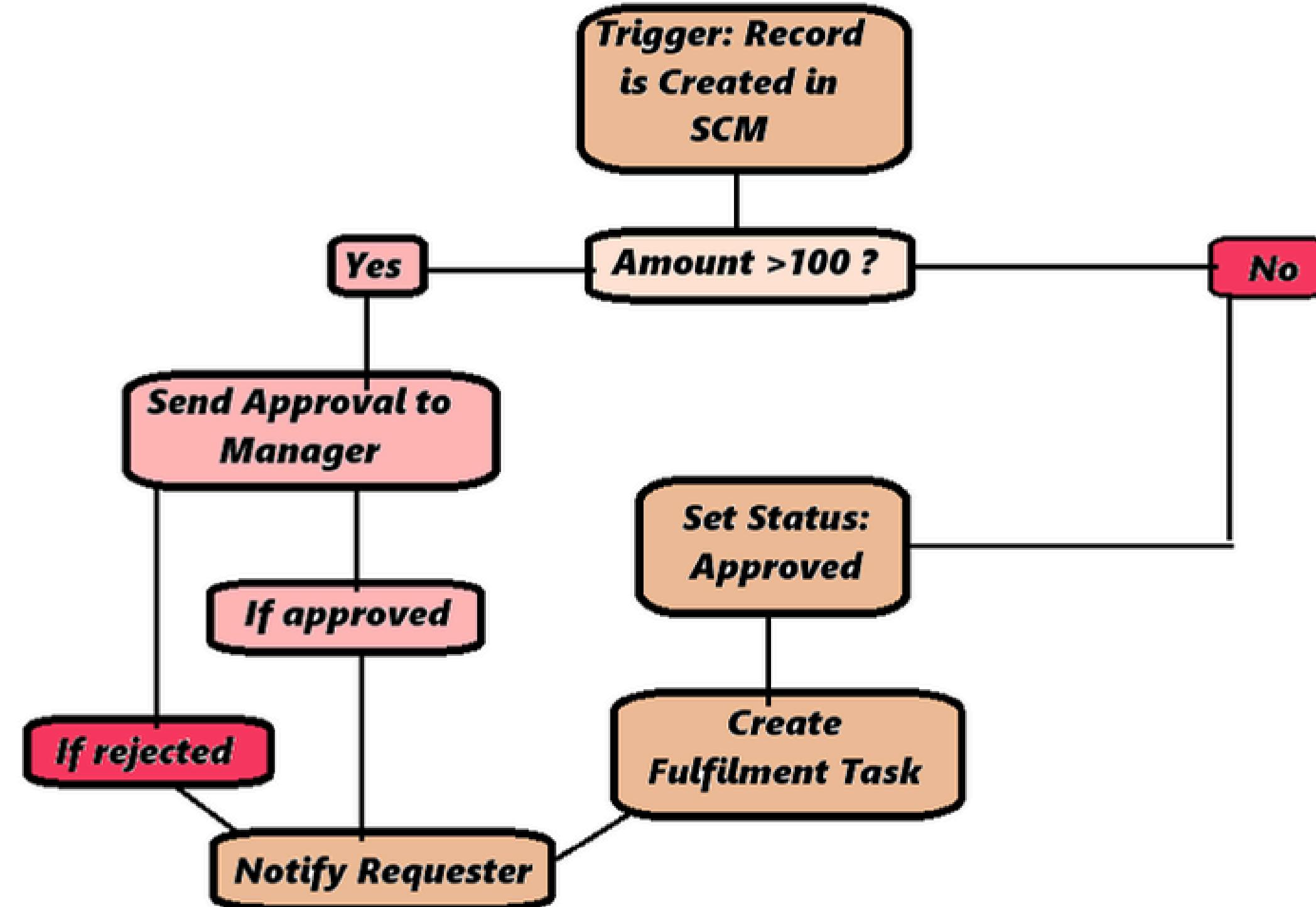
Thank you

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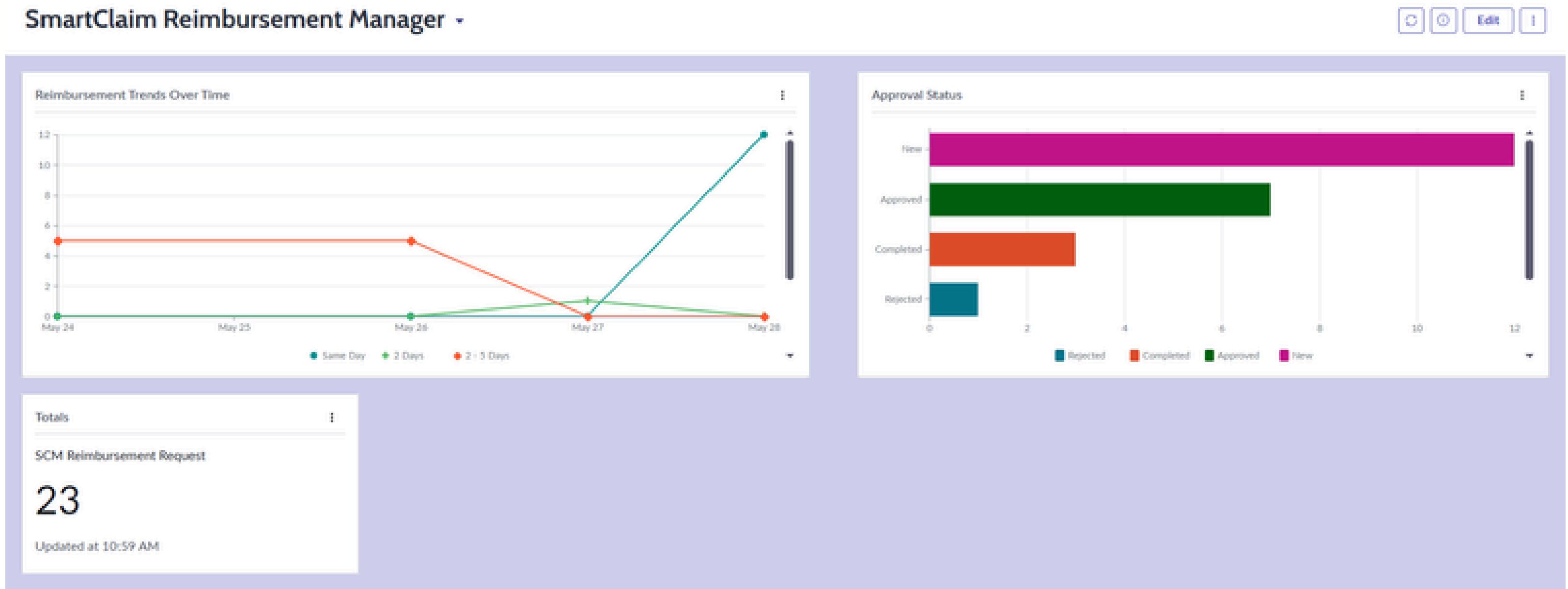
Automated Flow: Claim Request Lifecycle

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SmartClaim Reimbursement Dashboards

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Key test areas and outcomes

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- **Forms & Validations** - Required fields, email format, and dynamic field logic working as expected
- **Client Scripts, UI Policies and Business Rules** - Verification of value, visibility toggles, and field interactions tested and passed
- **Record Producer** - Creates records in scoped table with accurate redirection and confirmation
- **Approval Workflow** - Claims > \$100 route to manager; ≤ \$100 auto-approved; rejection path validated
- **Notifications** - Emails sent correctly on submission, approval/rejection, and completion
- **Dashboards** - Accurate reporting of request trends and approval statuses
- **Access & Views** - Role-based access validated for requester, fulfiller, and approver



Lessons Learned

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- ◆ Engage stakeholders early
- ◆ Clarify business requirements upfront
- ◆ Improve test data readiness
- ◆ More sprint-level retrospectives





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Thank you



Q & A

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