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Title: Project Planning Phase

Project: Optimizing User, Group, and Role Management with Access Control and Workflows

DATE	NOV 2, 2025
TEAM ID	NM2025TMID02832
PROJECT NAME	Optimizing User, Group, and Role Management with Access Control and Workflows
MAXIMUM MARKS	5 MARKS

Sections

1. Project Scope

- Define user roles: Project Manager (Alice) and Team Member (Bob)
- Implement role-based access control (ACLs)
- Automate workflows using Flow Designer
- Establish approval mechanism for completed tasks
- Provide audit visibility for Alice through “My Approvals”

2. Tools & Technologies

- **ServiceNow PDI** – Instance for development and testing
- **Flow Designer** – Automation of approvals and task status updates
- **Access Control Lists (ACLs)** – For field-level security
- **User & Role Administration** – For permission configuration

3. Work Breakdown & Timeline

Week	Tasks	Deliverables
Week 1	Instance setup, user creation (Alice & Bob), basic configuration	Users created and instance accessible
Week 2	Define roles (project_manager, team_member), assign to users	Role mapping completed

Week 3	Create custom task table (u_task_table_2), define fields, apply ACLs	Controlled table access achieved
Week 4	Build Flow Designer workflow, automate task updates, and test approvals	Working automated approval flow

4. Responsibilities

Member	Role	Responsibility
Alice	Project Manager	Assign tasks, review progress, approve completions
Bob	Team Member	Update task status, provide comments, request approvals
Admin (you)	Developer	Configure ACLs, roles, workflows, and testing

5. Risk & Mitigation

Risk	Impact	Mitigation
ACL misconfiguration	Access blocked or overexposed	Use impersonation testing
Workflow trigger errors	Flow not executing	Validate trigger conditions and field names
Approval not visible	Delayed project closure	Check “My Approvals” module permissions

6. Milestones

- Week 1: Instance active
- Week 2: Roles assigned
- Week 3: ACLs verified (Bob restricted, Alice full access)
- Week 4: Flow Designer automation approved and tested

8. Conclusion

The project plan ensures systematic implementation of ServiceNow access control and workflow automation. Each week progressively builds the foundation: from environment

setup and role configuration to ACL security and flow automation. This approach guarantees a functional, testable, and fully documented ServiceNow solution.