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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 | NM2025TMID03787 |
| PROJECT NAME | Optimizing User, Group, and Role Management with Access Control and Workflows |
| MAXIMUM MARKS | 5 MARKS |

**Sections**

## 1. Project Scope

The project focuses on designing and implementing a secure and automated task management workflow in ServiceNow.

Key Objectives:

- Define user roles: Project Manager (Alice) and Team Member (Bob)

- Implement role-based access control (ACLs) for field-level security

- Automate task updates and approvals using Flow Designer

- Establish an approval mechanism for completed tasks

- Provide audit visibility for Alice through the *My Approvals* module

## 2. Tools & Technologies

| Tool / Technology | Purpose |
|---|---|
| ServiceNow PDI | Instance for development and testing |
| Flow Designer | Automation of approvals and task status updates |
| Access Control Lists (ACLs) | Field-level security and access management |
| User & Role Administration | Configuration of permissions and user mapping |

## 3. Work Breakdown & Timeline

| Week | Tasks | Deliverables |
|---|---|---|
| Week 1 | Instance setup, creation of users (Alice & Bob), and basic configuration | Users created; 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, and apply ACLs | Controlled access to task table achieved |
| Week 4 | Build Flow Designer workflow, automate task updates, and test approvals | Working automated approval flow verified |

## 4. Responsibilities

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

## 5. Risks & Mitigation Strategies

| Risk | Impact | Mitigation |
|---|---|---|
| ACL misconfiguration | Access blocked or overexposed | Perform impersonation testing to verify access |
| Workflow trigger errors | Flow not executing | Validate trigger conditions and field references |
| Approval not visible | Delayed project closure | Verify *My Approvals* module permissions and configuration |

## 6. Project Milestones

- Week 1: Instance setup and user creation completed

- Week 2: Roles assigned to Alice and Bob

- Week 3: ACLs verified — Bob restricted; Alice has full access

- Week 4: Flow Designer automation built, tested, and approved

## 7. Conclusion

This project plan establishes a structured and secure ServiceNow workflow that evolves through clearly defined weekly phases — from environment setup and user-role configuration to ACL security enforcement and flow automation.
The systematic approach ensures a functional, testable, and fully documented ServiceNow solution, ready for academic or production-level evaluation.