

# **Optimizing User, Group, and Role Management with Access Control and Workflows**

## **Introduction:**

Effective management of users, groups, and roles is key to securing systems and ensuring efficient operations. By implementing access control strategies like Role-Based Access Control (RBAC) and automating workflows, organizations can grant the right access at the right time, minimize security risks, and streamline administrative tasks. This guide explores how to optimize user management with best practices for access control and workflow automation, balancing security and efficiency.

## **Milestones:**

1. **USERS**
2. **GROUPS**
3. **ROLES**
4. **ASSIGN USERS TO GROUPS**
5. **ASSIGN ROLES TO USERS**
6. **APPLICATION ACCESS**
7. **ACCESS CONTROL LIST**
8. **FLOW**

**Team id:NM2025TMID18086**

**Team leader:Kirthika.K**

**Team member:Karthika.S**

**Team member:Mathumitha.R**

**Team member:Mahalakshmi.R**

## **1. USERS:**

**Activity: Create user**

1. Open service now
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user
6. Click on submit

The screenshot shows the ServiceNow user creation interface. The browser address bar indicates the URL: `dev339347.service-now.com/now/nav/ui/classic/params/target/sys_user.do%3Fsys_id%3D7487ccd9c3b72210ed217405e40131a3%26sysparm_record_target%3Dsys_use...`. The page title is "User - alice p". The form contains the following fields and options:

- User ID:** Alice
- First name:** alice
- Last name:** p
- Title:** (empty)
- Department:** (empty)
- Email:** alice@gmail.com
- Identity type:** Human
- Language:** -- None --
- Calendar integration:** Outlook
- Time zone:** System (America/Los\_Angeles)
- Date format:** System (yyyy-MM-dd)
- Business phone:** (empty)
- Mobile phone:** (empty)
- Photo:** Click to add...
- Password needs reset:** ☐
- Locked out:** ☐
- Active:** ☒
- Internal Integration User:** ☐

Buttons at the top right: Update, Set Password, Delete. Buttons at the bottom left: Update, Set Password, Delete. Related Links: View linked accounts, View Subscriptions, Reset a password.

## Create one more user:

7. Create another user with the following details
8. Click on submit

ServiceNow Developers | bob p | User | ServiceNow | - Student | 85rSWsAAAAAGSURBVAMA... | (1) WhatsApp

dev339347.service-now.com/now/nav/ui/classic/params/target/sys\_user.do%3Fsys\_id%3Dbb09c4d1c3b72210ed217405e401314b%26sysparm\_record\_target%3Ds...

servicenow All Favorites History Workspaces User - bob p Search

User bob p Update Set Password Delete

User ID Bob First name bob Last name p Title Department Password needs reset Locked out Active Internal Integration User

Email bob@gmail.com Identity type Human Language -- None -- Calendar integration Outlook Time zone System (America/Los\_Angeles) Date format System (yyyy-MM-dd) Business phone Mobile phone Photo Click to add...

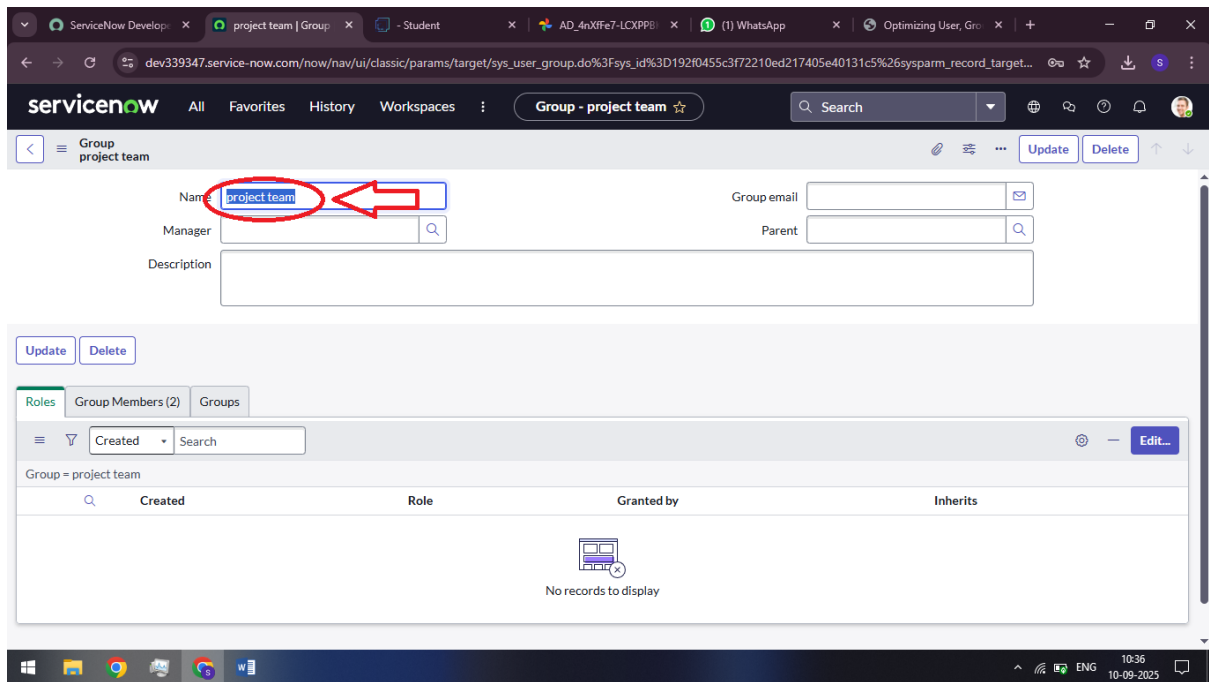
Update Set Password Delete

Related Links  
[View linked accounts](#)  
[View Subscriptions](#)  
[Reset a password](#)

## 2. GROUPS:

### Activity: Create groups

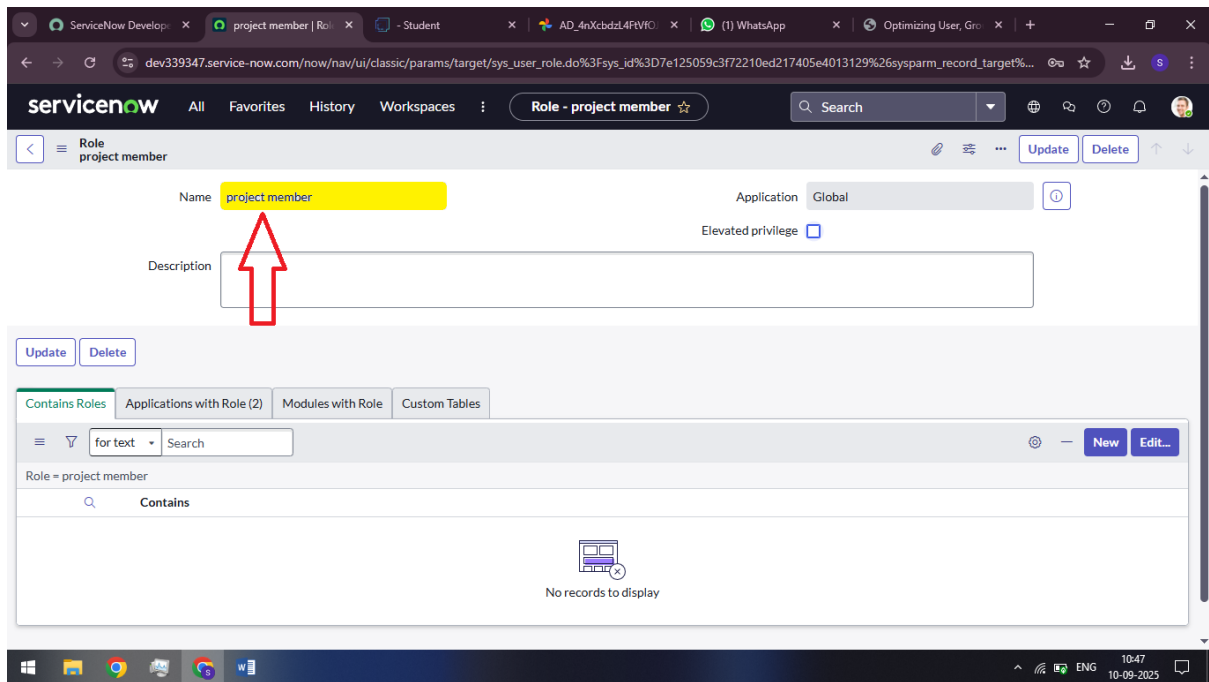
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



### 3. ROLES:

#### Activity: Create roles

1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role
6. Click on submit



## Create one more role:

7. Create another role with the following details: Team member
8. Click on submit

## 4. TABLES:

### Activity: Create tables

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table  
Label : project table  
Check the boxes Create module & Create mobile module
6. Under new menu name : project table
7. Under table columns give the columns

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

\* Label: **project table** Application: Global  
 \* Name: u\_project\_table Remote Table: ☐

**Columns** | Controls | Application Access

Table Columns for text Search 1 to 13 of 13 New

Column label	Type	Reference	Max length	Default value	Display
project name	String	(empty)	40		false
description	String	(empty)	40		false
project id	Integer	(empty)	40		false
Updated	Date/Time	(empty)	40		false
project manager	String	(empty)	40		false

8. Click on submit

## Create one more table:

9. Create another table as: task table 2 and fill with following details.

10. Click on submit.

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

\* Label: **task table 2** Application: Global  
 \* Name: u\_task\_table\_2 Remote Table: ☐

**Columns** | Controls | Application Access

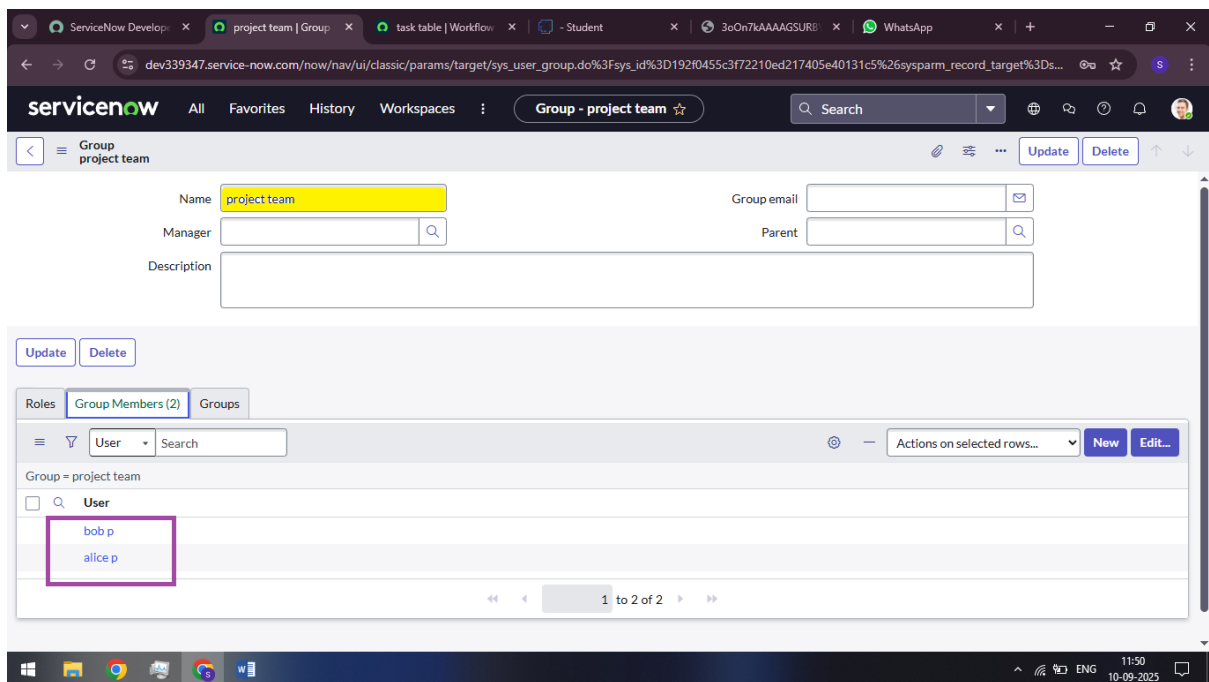
Table Columns for text Search 1 to 12 of 12 New

Column label	Type	Reference	Max length	Default value	Display
task id	Integer	(empty)	40		false
task name	String	(empty)	40		false
Updated	Date/Time	(empty)	40		false
status	Choice	(empty)	40		false
Created by	String	(empty)	40		false

## 5. Assign users to groups:

## Activity: Assign users to project team group

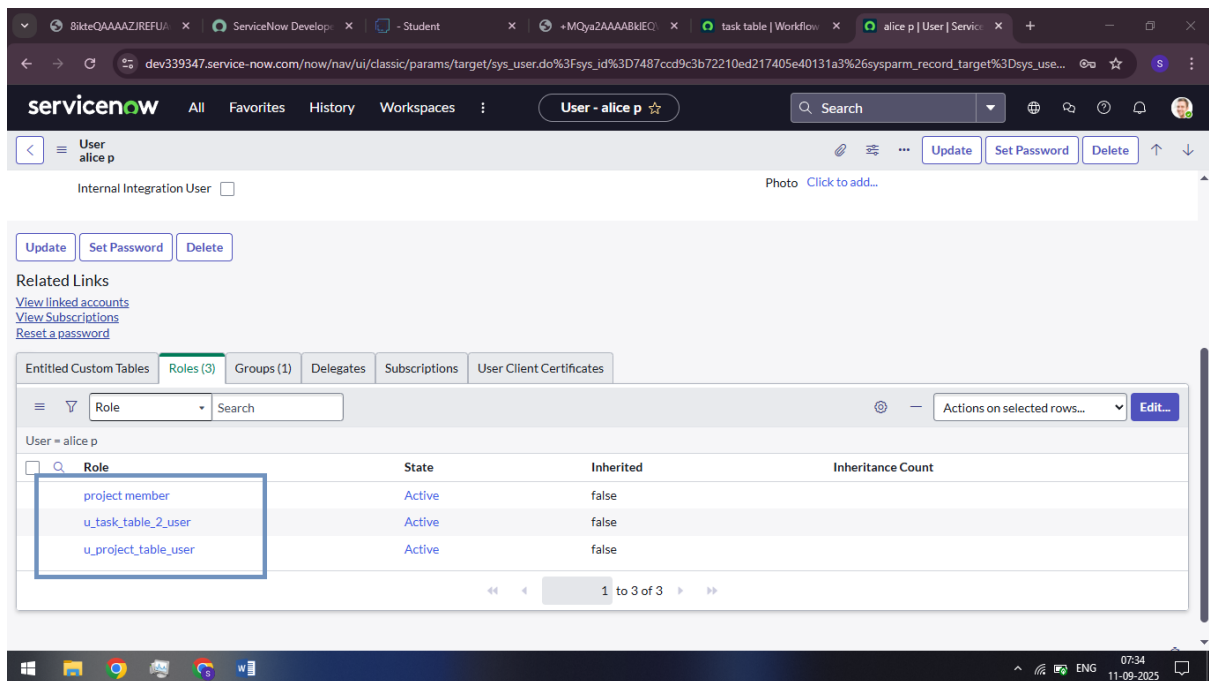
1. Open service now.
2. Click on All >> search for groups
3. Select tables under system definition
4. Select the project team group
5. under group members
6. Click on edit
7. Select Alice p and bob p and save



## 6. Assign roles to users:

### Activity 1: Assign roles to alice user

1. Open servicenow. Click on All >> search for user
2. Select tables under system definition
3. Select the project manager user
4. under project manager
5. Click on edit
6. Select project member and save
7. Click on edit add u\_project\_table role and u\_task\_table role
8. Click on save and update the form.



## Activity 2: Assign roles to bob user

1. Open ServiceNow. Click on All >> search for user
2. Select tables under system definition
3. Select the bob p user
4. under team member
5. Click on edit
6. Select team member and give table role and save
7. Click on profile icon Impersonate user to bob
8. We can see the task table2.



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dev339347.service-now.com/now/nav/ui/classic/params/target/sys\_user.do%3Fsys\_id%3Dbb09c4d1c3b72210ed217405e401314b%26sysparm\_record\_target%3Dsys\_use...

User - bob p

Active ☒ Mobile phone  Photo [Click to add...](#)

Internal Integration User ☐

Update Set Password Delete

Related Links

[View linked accounts](#)

[View Subscriptions](#)

[Reset a password](#)

Entitled Custom Tables Roles (2) Groups (1) Delegates Subscriptions User Client Certificates

Role Search Actions on selected rows... Edit...

User = bob p

Role	State	Inherited	Inheritance Count
team member	Active	false	
u_task_table_2_user	Active	false	

1 to 2 of 2

## 7. Application access

### Activity: Assign table access to application

1. while creating a table it automatically create a application and module for that table
2. Go to application navigator search for search project table application
3. Click on edit module
4. Give project member roles to that application
5. Search for task table2 and click on edit application.
6. Give the project member and team member role for task table 2 application

The screenshot shows the ServiceNow 'Application Menu' configuration page for the 'project table'. The page includes a header with the ServiceNow logo, navigation tabs (All, Favorites, History, Admin), and a search bar. The main content area contains several configuration fields:

- Title:** project table
- Application:** Global
- Active:** ☒
- Roles:** project member
- Category:** Custom Applications
- Hint:** (empty text box)
- Description:** (empty text box)

Below the configuration fields, there are two empty text boxes for 'Hint' and 'Description'. The bottom of the screen shows a Windows taskbar with various application icons and a system tray with network, language, and time information.

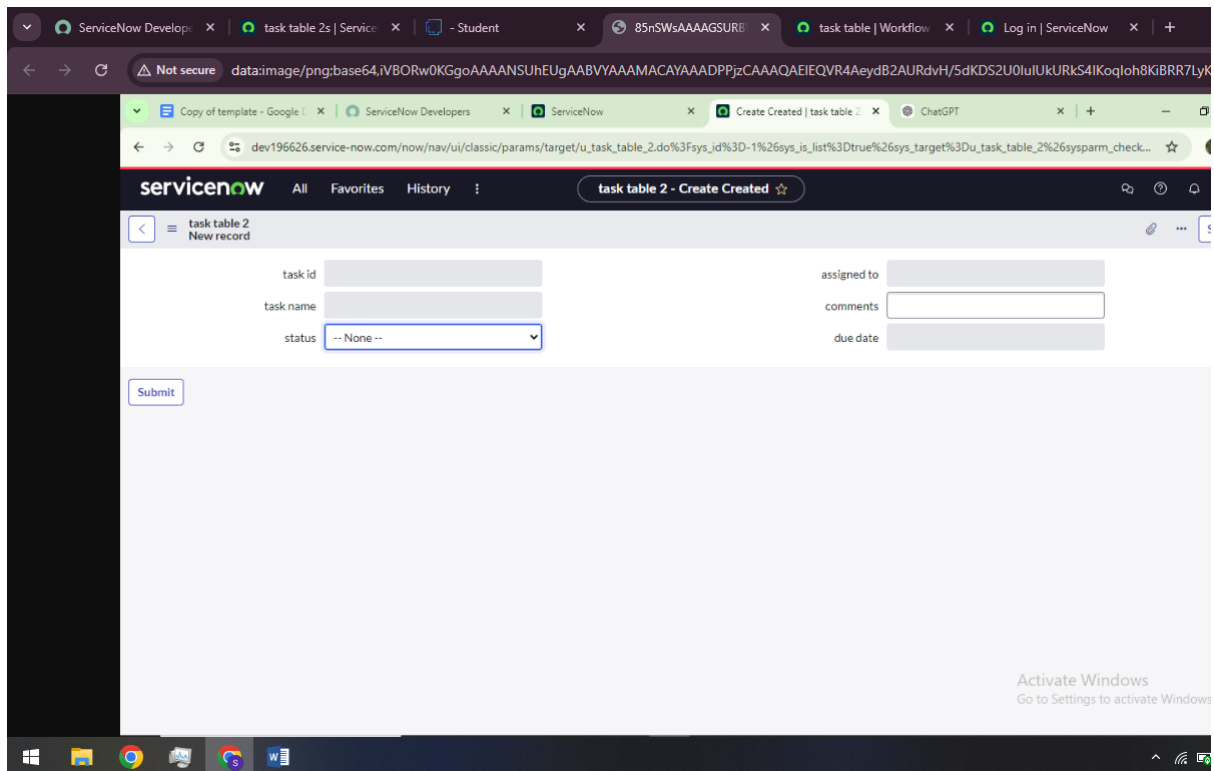
## 8. Access control list

### Activity: Create ACL

1. Open service now.
2. Click on All >> search for ACL
3. Select Access Control(ACL) under system security
4. Click on elevate role
5. Click on new
6. Fill the following details to create a new ACL



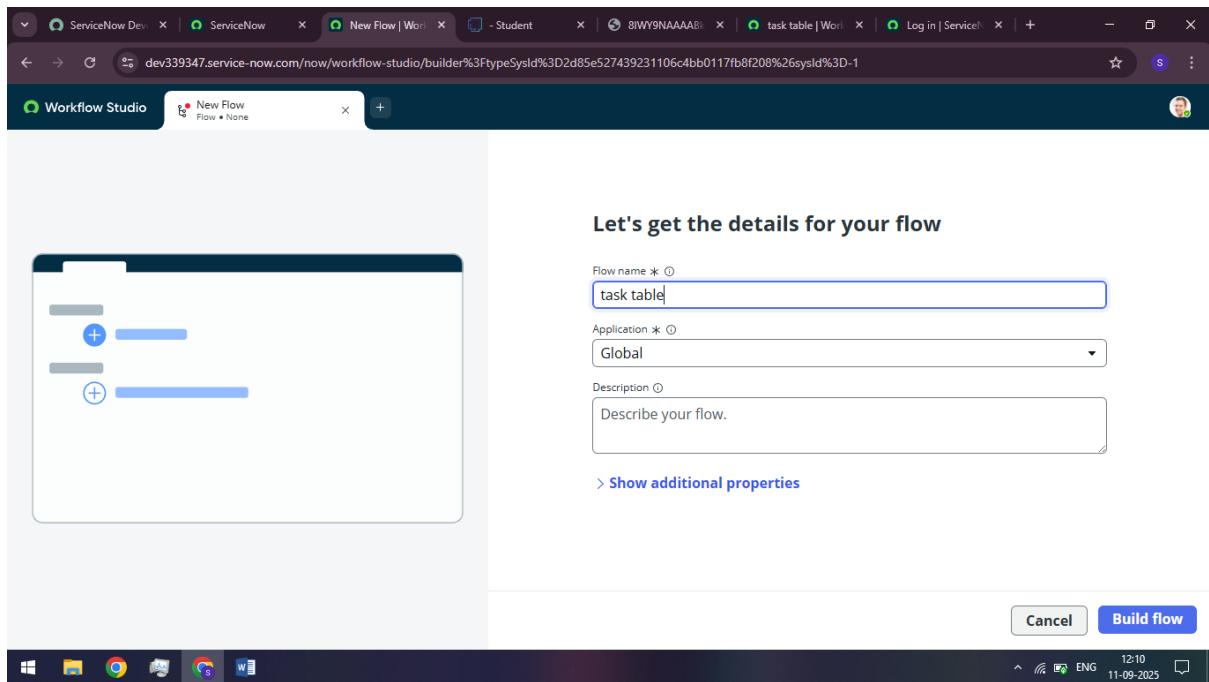
16. Comment and status fields are have the edit access



## 9. Flow

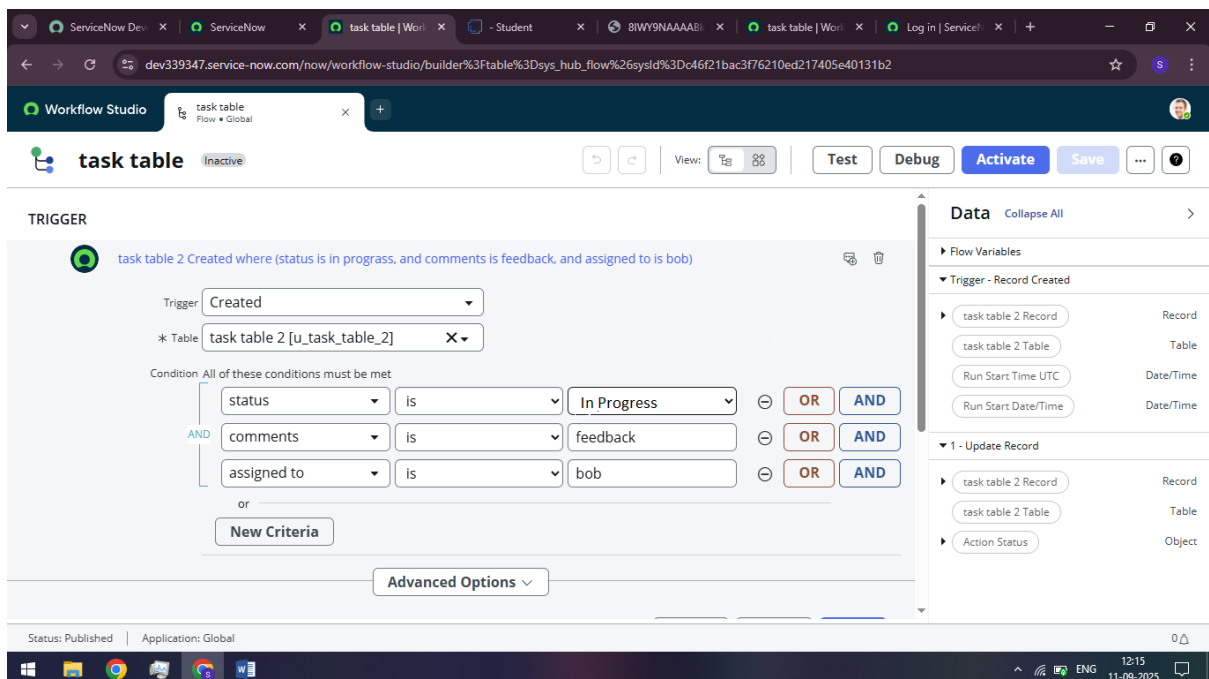
### Activity: Create a Flow to Assign operations ticket to group

1. Open service now.
2. Click on All >> search for Flow Designer
3. Click on Flow Designer under Process Automation.
4. After opening Flow Designer Click on new and select Flow.
5. Under Flow properties give Flow Name as “task table”.
6. Application should be Global.
7. Click build flow.



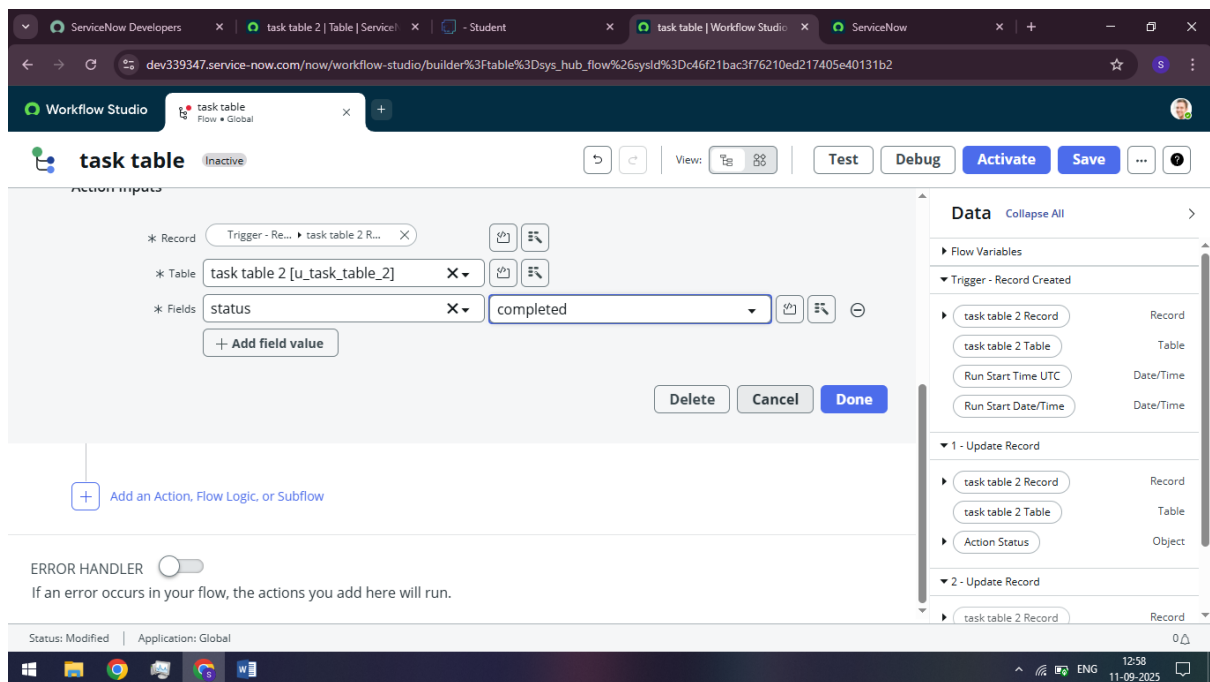
### Next step:

1. Click on Add a trigger
2. Select the trigger in that Search for “create record” and select that.
3. Give the table name as “task table”.
4. Give the Condition as Field : status Operator :is Value : in progress  
Field: comments Operator: is Value: feedback  
Field: assigned to Operator: is Value: bob
5. After that click on done.



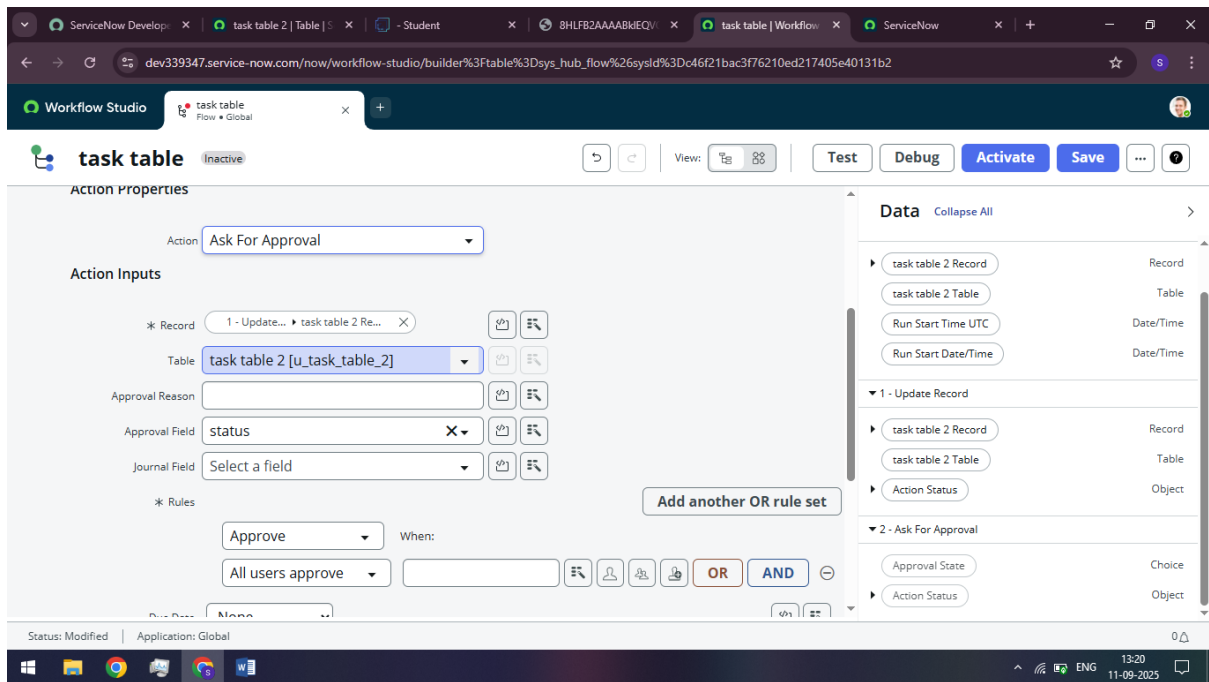
### Next step:

1. Click on Add an action.
2. Select action in that, search for “update records”.
3. In Record field drag the fields from the data navigation from Right Side(Data pill)
4. Table will be auto assigned after that
5. Add fields as “status” and value as “completed”
6. Click on Done.

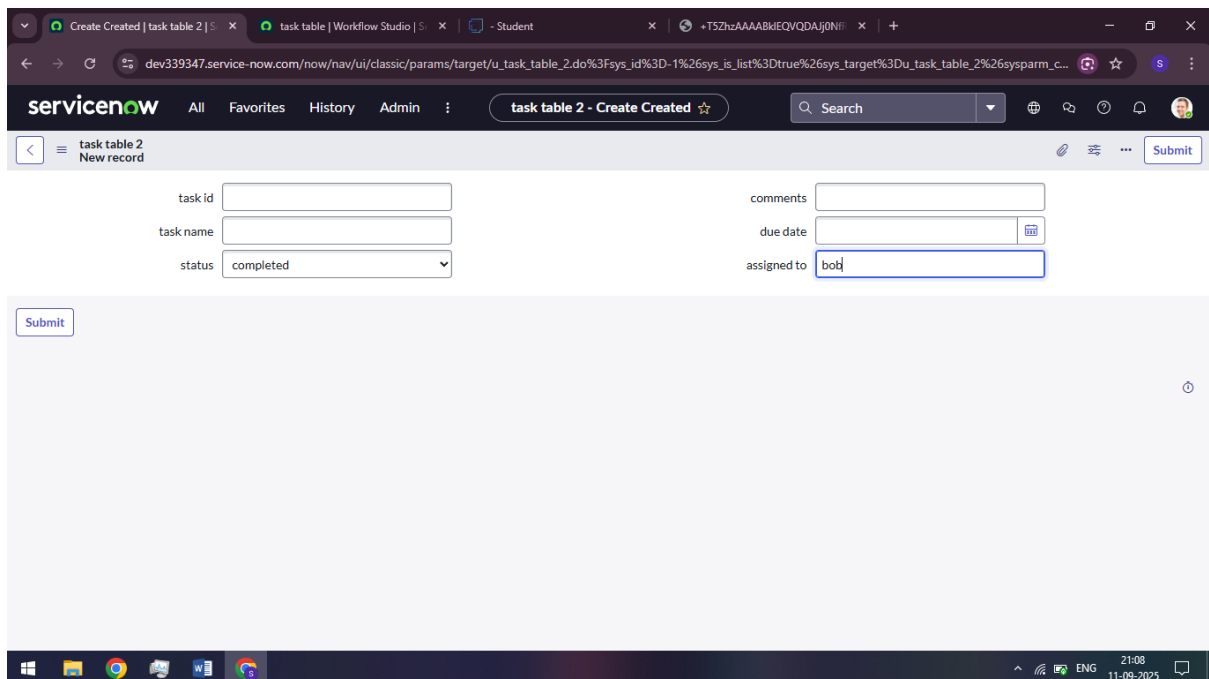


### Next step:

1. Now under Actions.
2. Click on Add an action.
3. Select action in that, search for “ask for approval”.
4. In Record field drag the fields from the data navigation from Right side
5. Table will be auto assigned after that
6. Give the approve field as “status”
7. Give approver as alice p
8. Click on Done.



9. Go to application navigator search for task table.
10. If status field is updated to completed



11. Go to application navigator and search for my approval
12. Click on my approval under the service desk.
13. Alice p got approval request then right click on requested then select approved

State	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2024-10-22 22:26:19
Rejected	Fred Luddy		(empty)	2024-09-01 12:19:33
Requested	Fred Luddy		(empty)	2024-09-01 12:17:03
Requested	Fred Luddy		(empty)	2024-09-01 12:15:44
Requested	Howard Johnson		CHG0000096	2024-09-01 06:15:29
Requested	Ron Kettering		CHG0000096	2024-09-01 06:15:29
Requested	Luke Wilson		CHG0000096	2024-09-01 06:15:29
Requested	Christen Mitchell		CHG0000096	2024-09-01 06:15:29
Requested	Bernard Laboy		CHG0000096	2024-09-01 06:15:29
Requested	Howard Johnson		CHG0000095	2024-09-01 06:15:25
Requested	Ron Kettering		CHG0000095	2024-09-01 06:15:25
Requested	Luke Wilson		CHG0000095	2024-09-01 06:15:25
Requested	Christen Mitchell		CHG0000095	2024-09-01 06:15:25
Requested	Bernard Laboy		CHG0000095	2024-09-01 06:15:25

## Conclusion

This scenario highlights a structured approach to project management, showcasing the roles of Alice and Bob within a defined workflow. With Alice's oversight and Bob's execution, the team effectively collaborates to ensure project success. The use of tables organizes key information, facilitating easy tracking of projects, tasks, and progress updates. Overall, this system promotes accountability, enhances communication, and leads to the successful completion of projects.