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

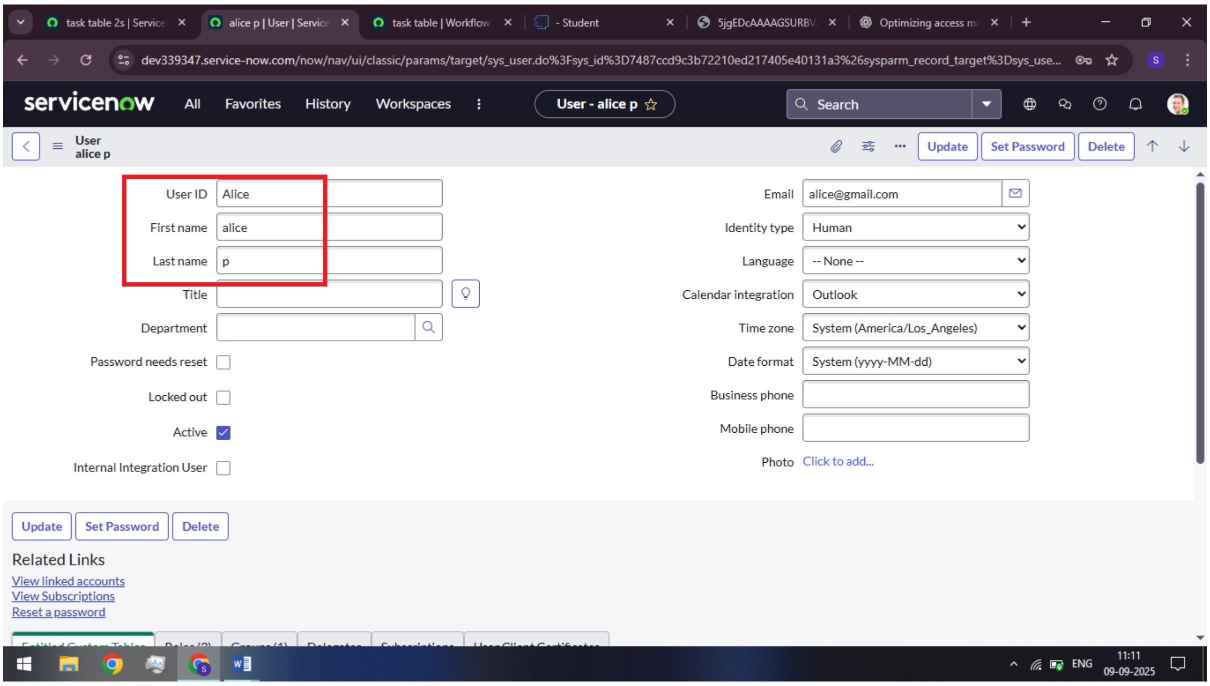
Team member:Mathumitha.R

Team member:Mahalakshmi.R

1. USERS:

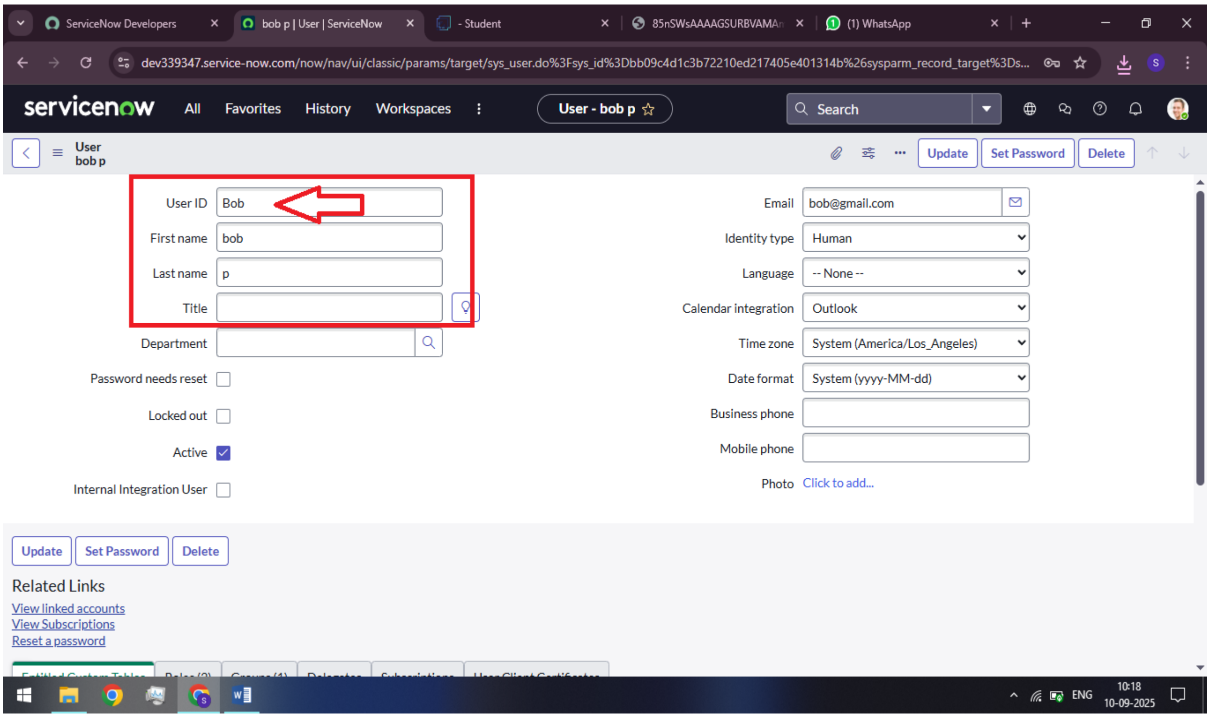
Activity: Create user

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



Create one more user:

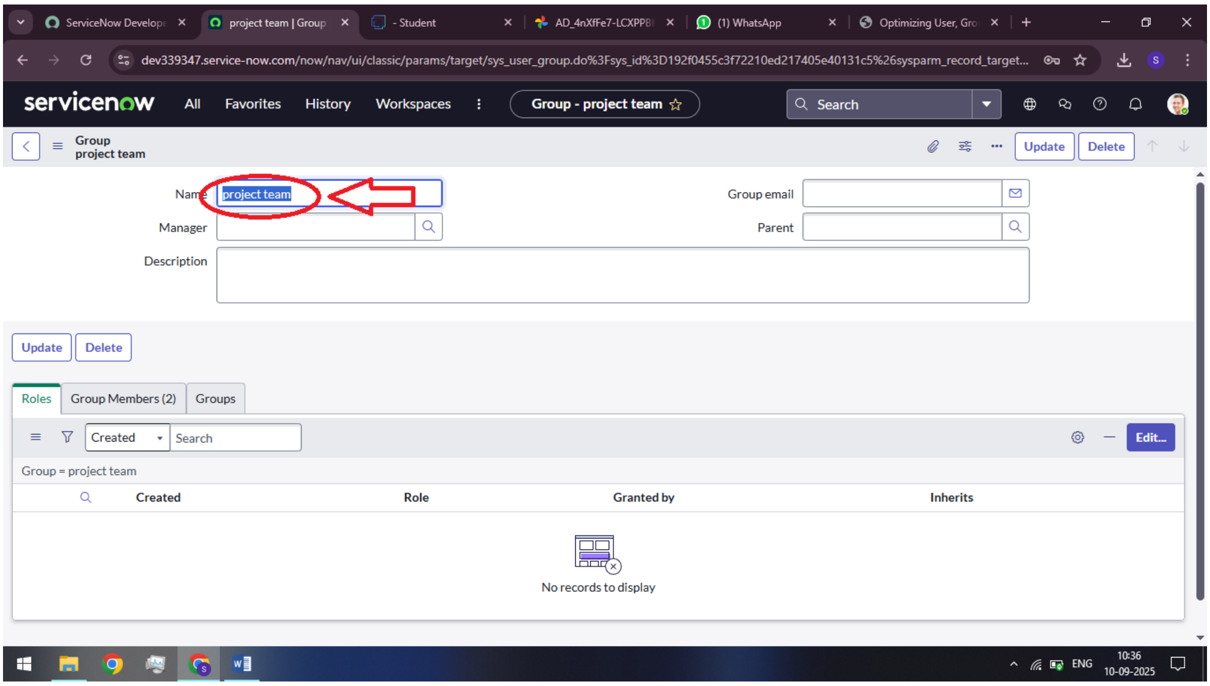
7. Create another user with the following details
8. Click on submit



2. GROUPS:

Activity: Create groups

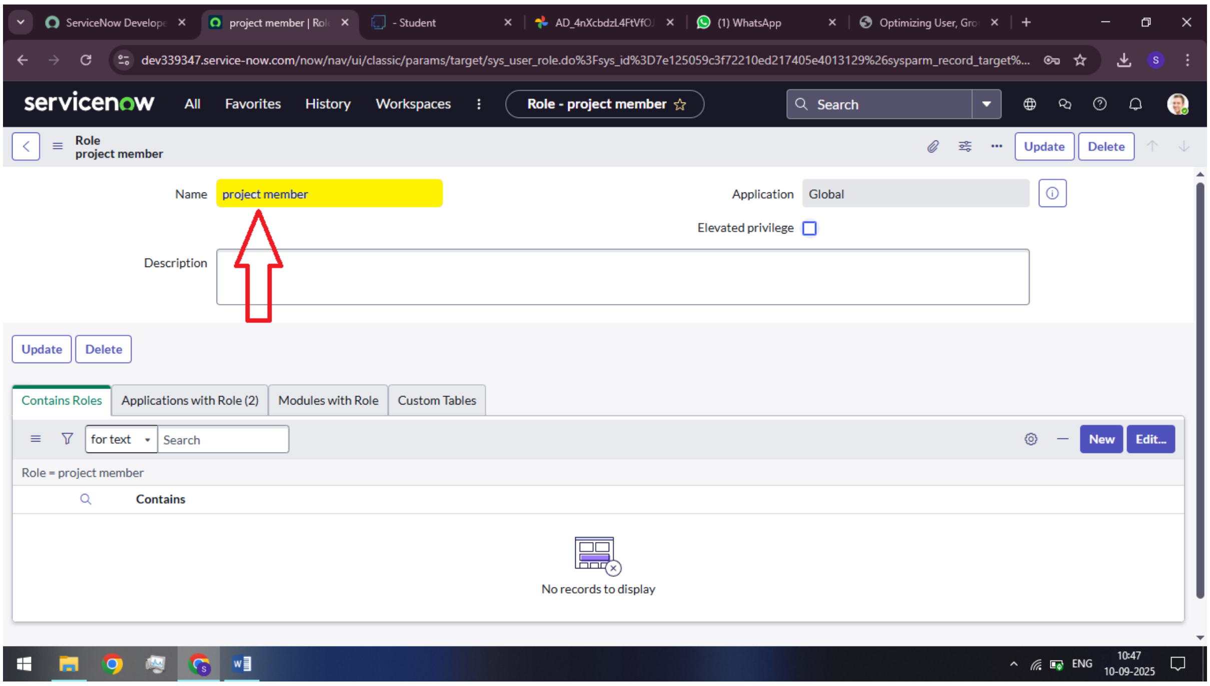
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



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



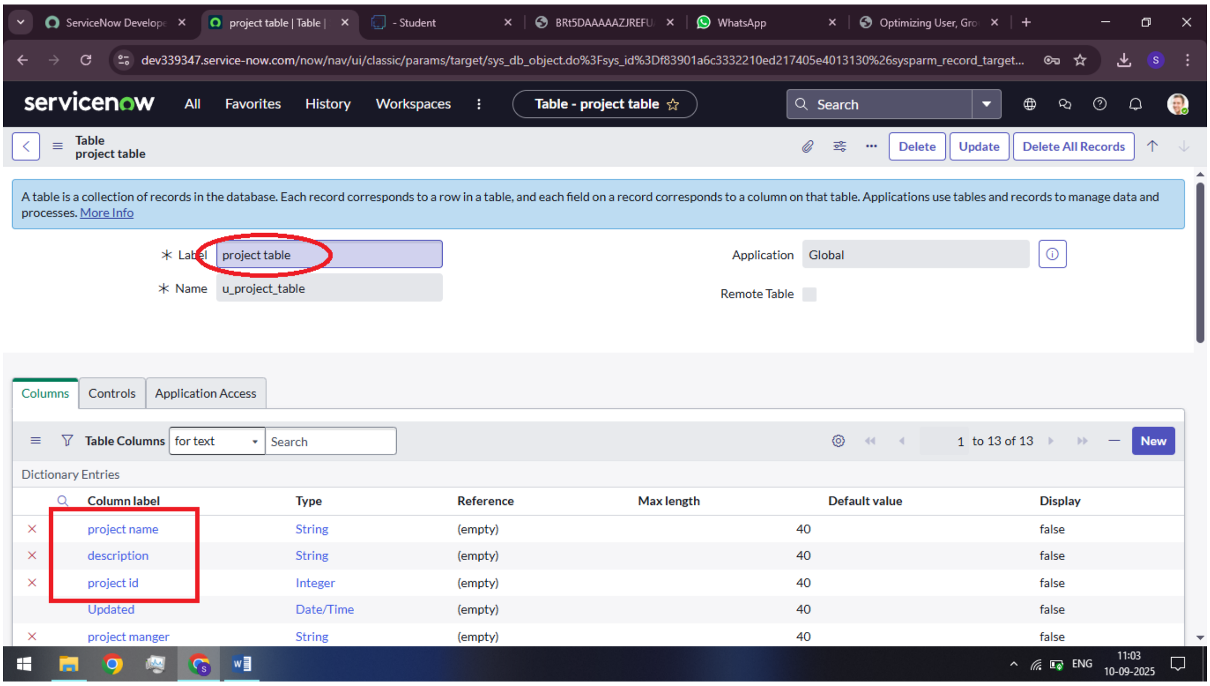
Create one more role:

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

4. TABLES:

Activity: Create tables

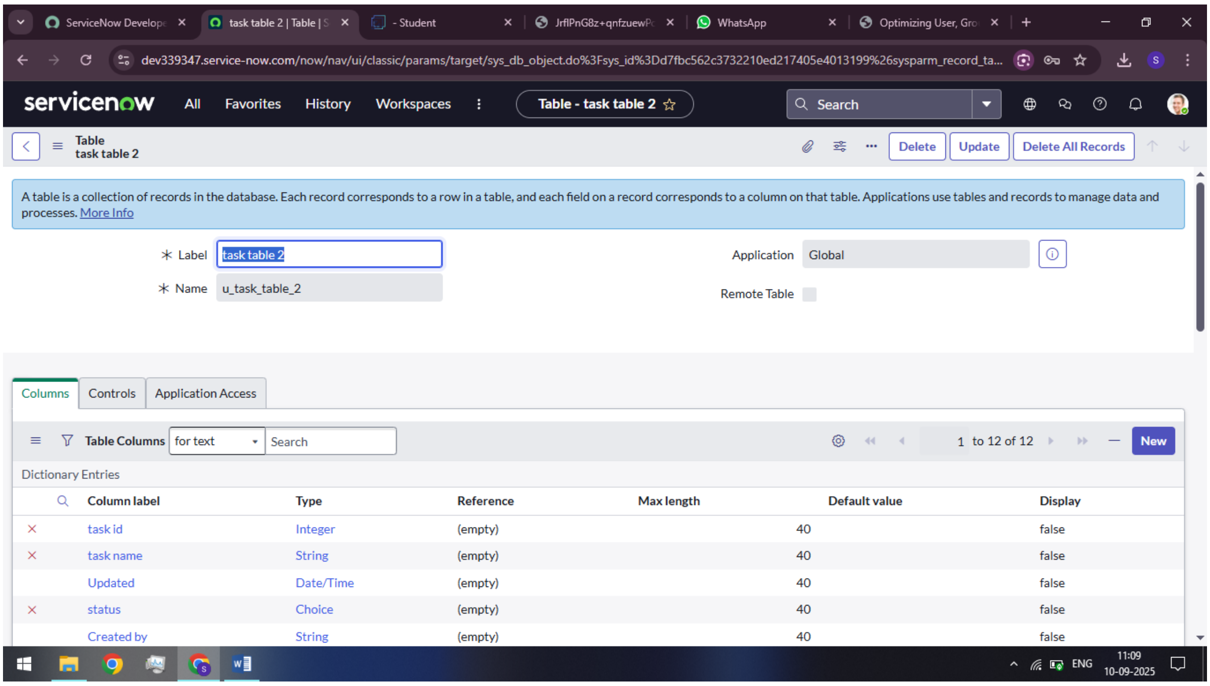
1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table
   Label : project table
   Check the boxes Create module & Create mobile module
6. Under new menu name : project table
7. Under table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



8. Click on submit

Create one more table:

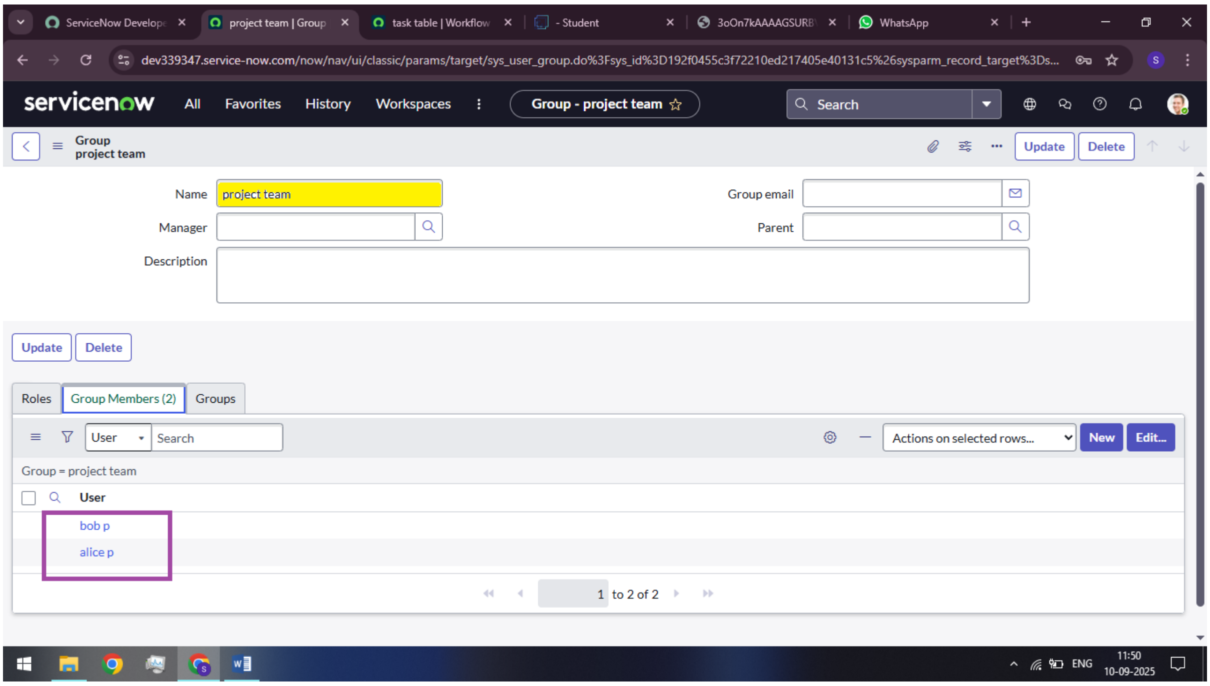
9. Create another table as: task table 2 and fill with following details.
10. Click on submit.



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

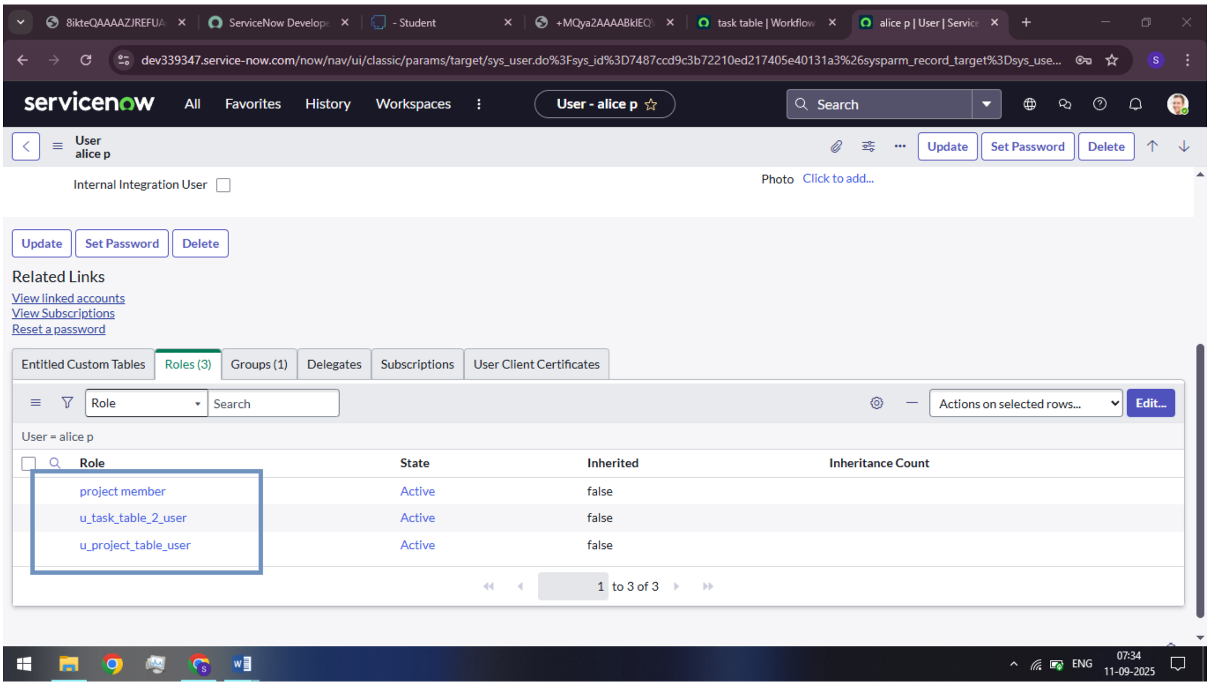


6. Assign roles to users:

Activity 1: Assign roles to alice user

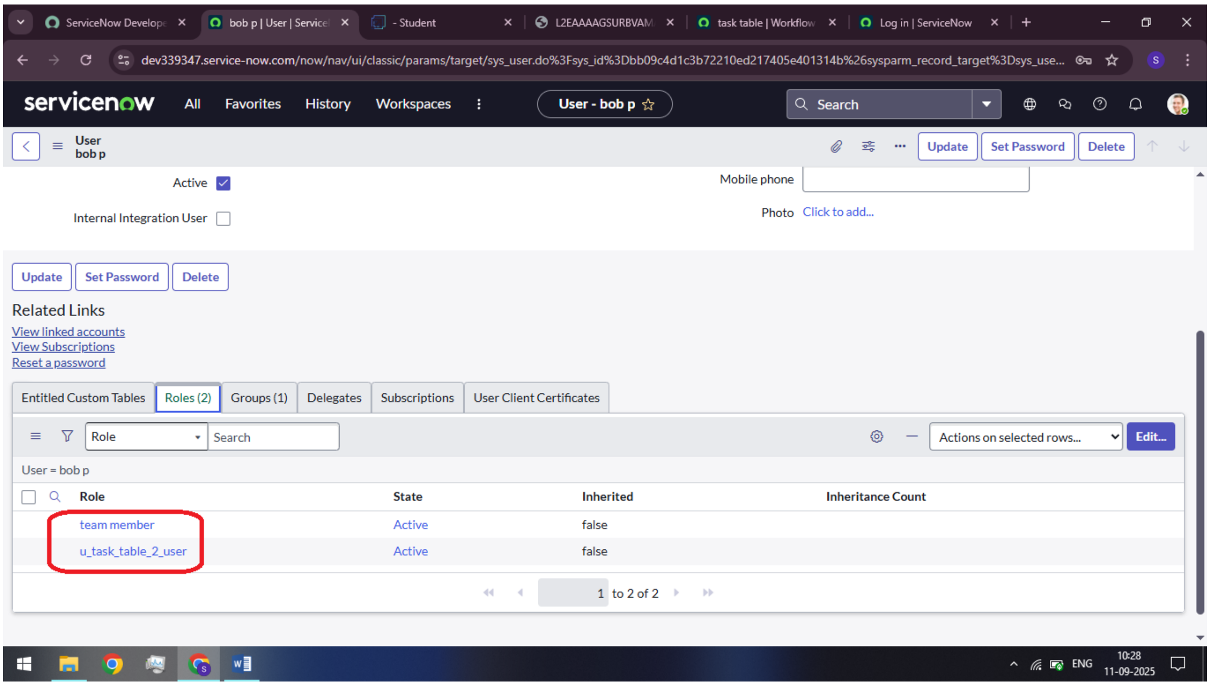
1. Open servicenow.Click on All >> search for user

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

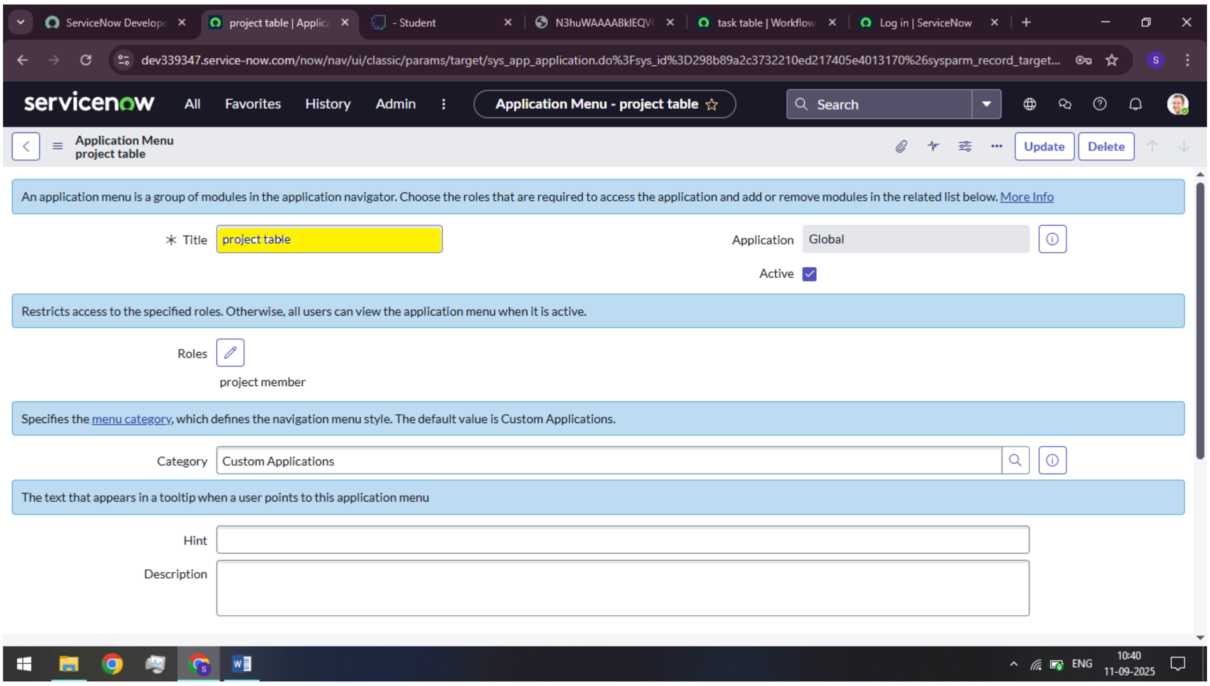
1. Open ServiceNow. Click on All >> search for user
2. Select tables under system definition
3. Select the bob p user
4. under team member
5. Click on edit
6. Select team member and give table role and save
7. Click on profile icon Impersonate user to bob
8. We can see the task table2.



7. Application access

Activity: Assign table access to application

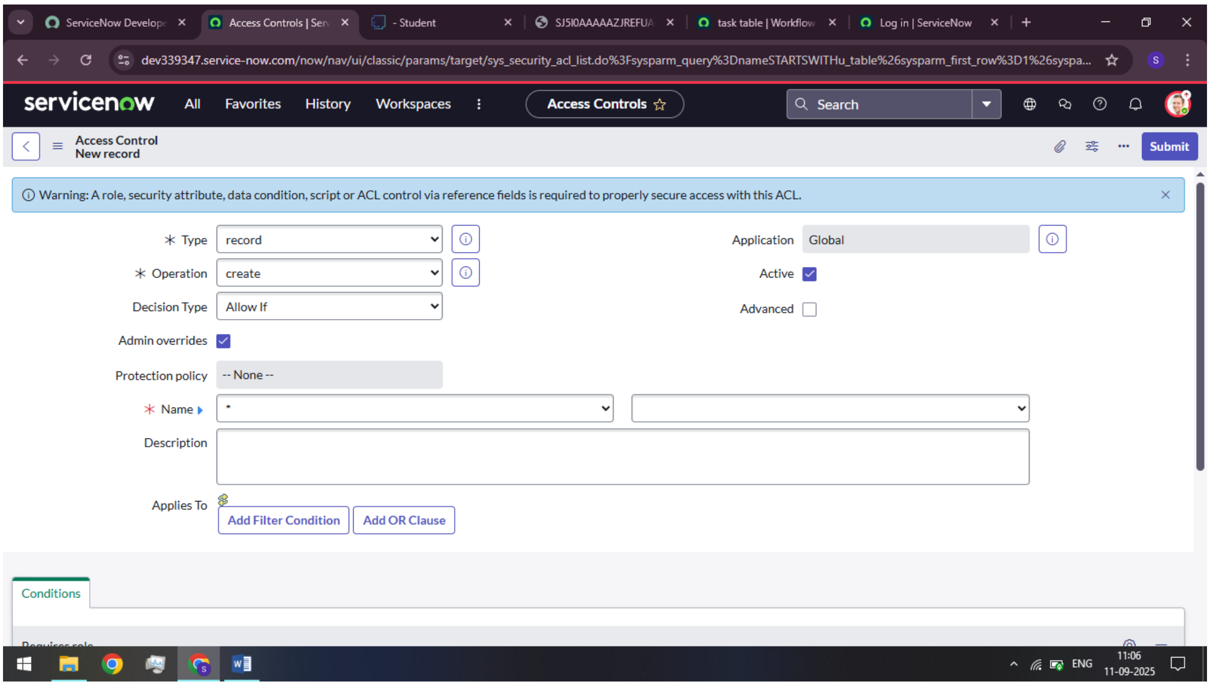
1. while creating a table it automatically create a application and module for that table
2. Go to application navigator search for search project table application
3. Click on edit module
4. Give project member roles to that application
5. Search for task table2 and click on edit application.
6. Give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



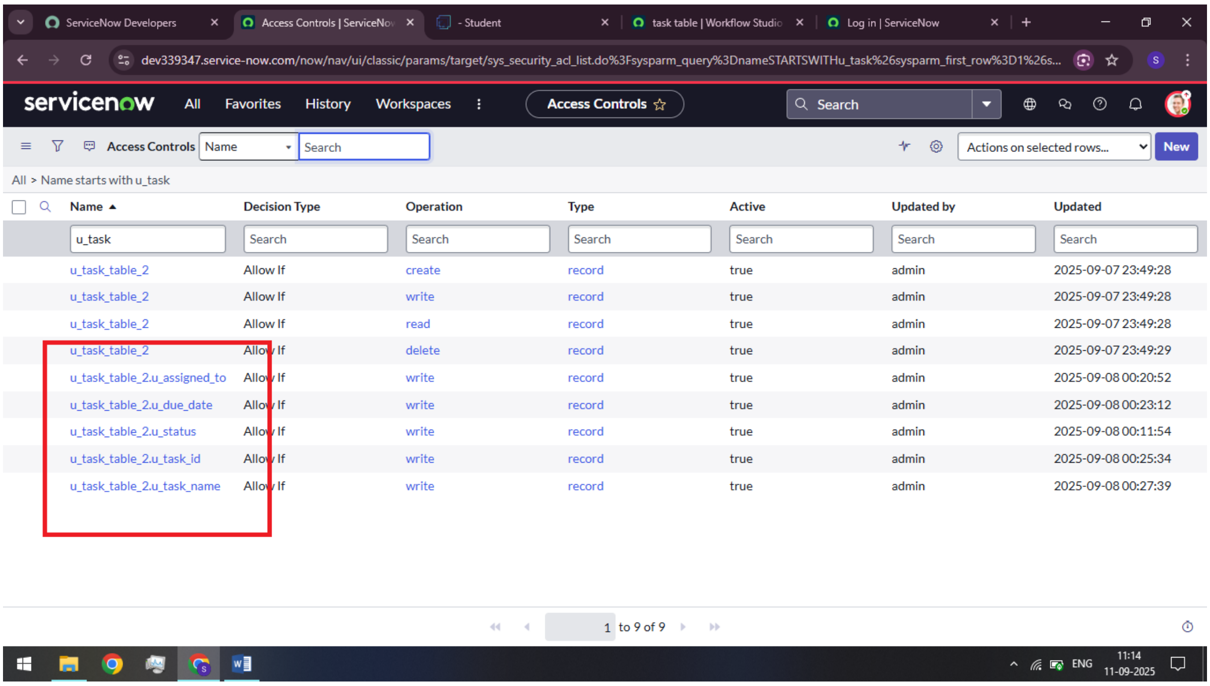
8. Access control list

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

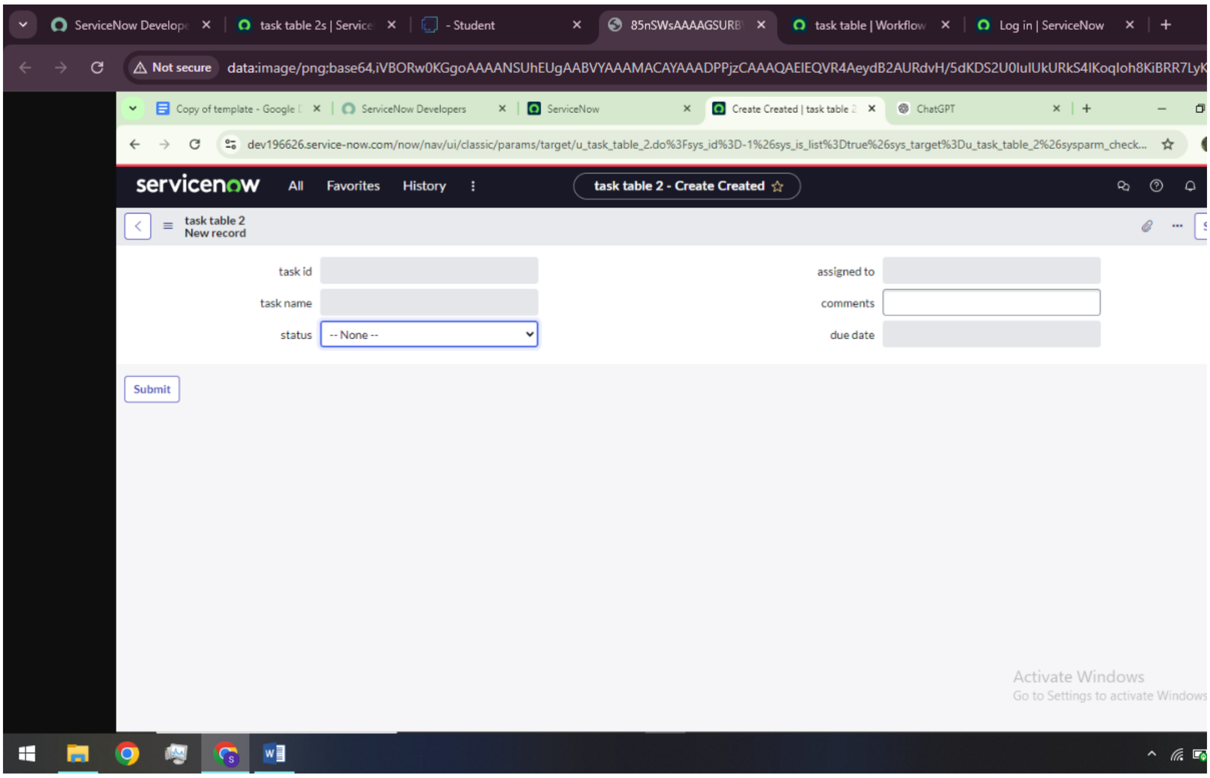


7. Scroll down under requires role
8. Double click on insert a new row
9. Give task table and team member role
10. Click on submit
11. Similarly create 4 acl for the following fields



12. Click on profile on top right side
13. Click on impersonate user
14. Select bob user
15. Go to all and select task table2 in the application menu bar

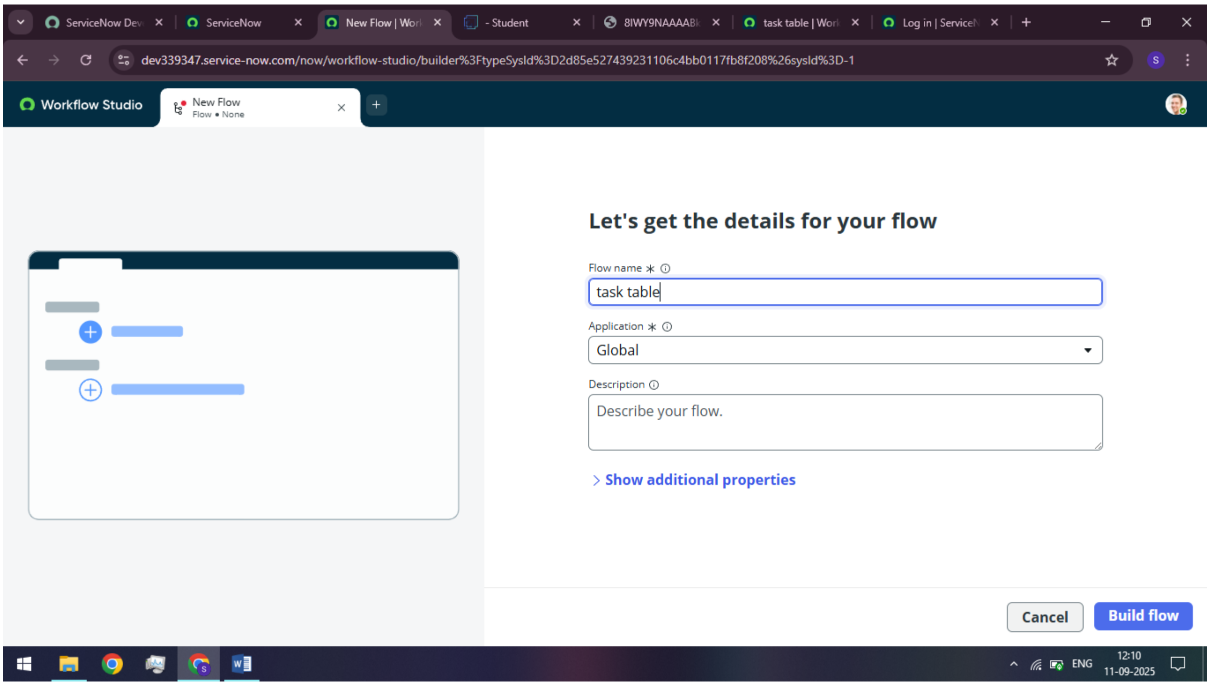
16. Comment and status fields are have the edit access



9. Flow

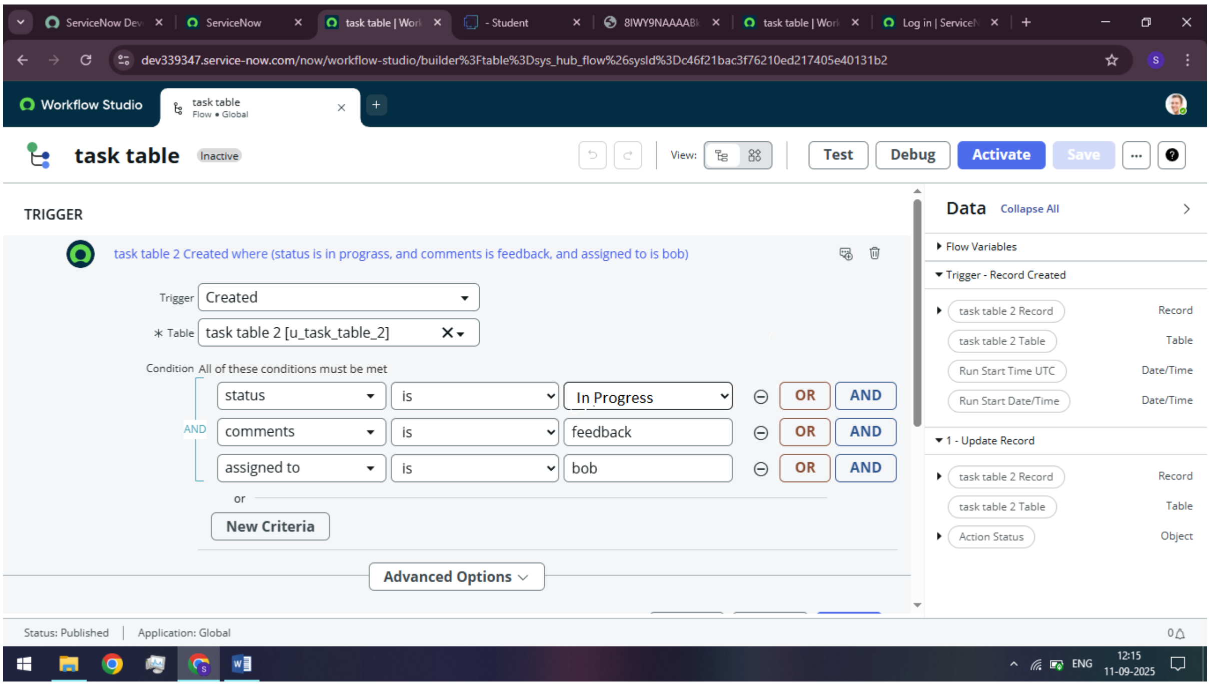
Activity: Create a Flow to Assign operations ticket to group

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.



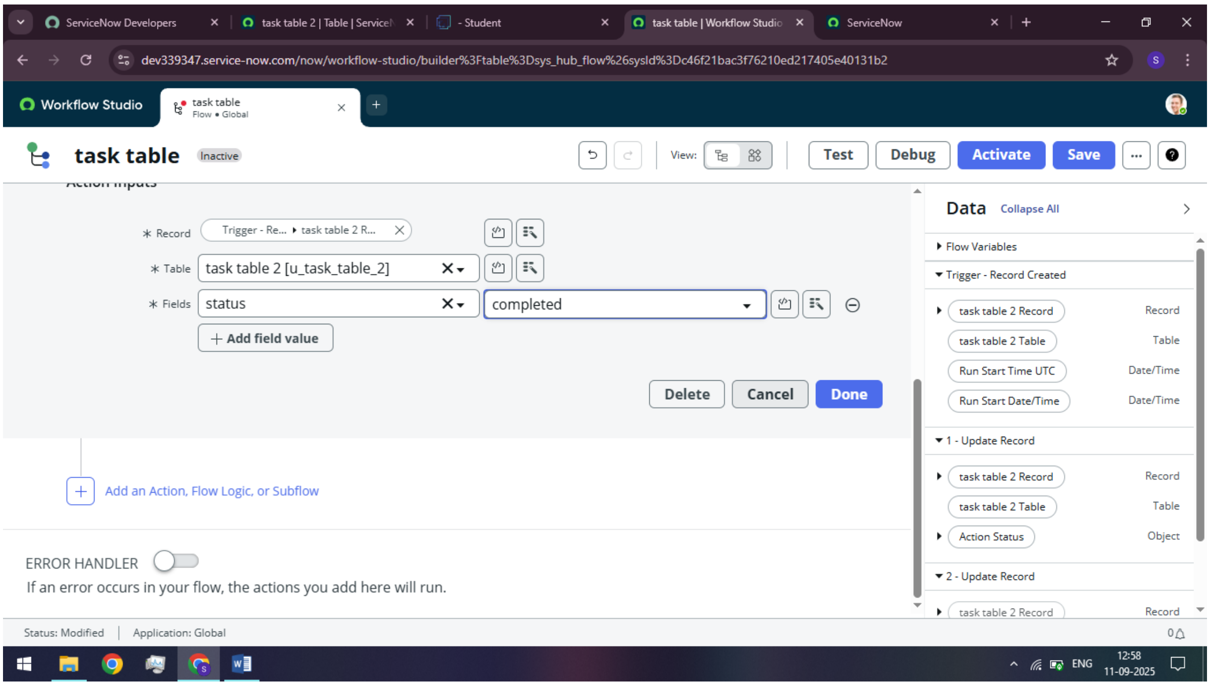
Next step:

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.



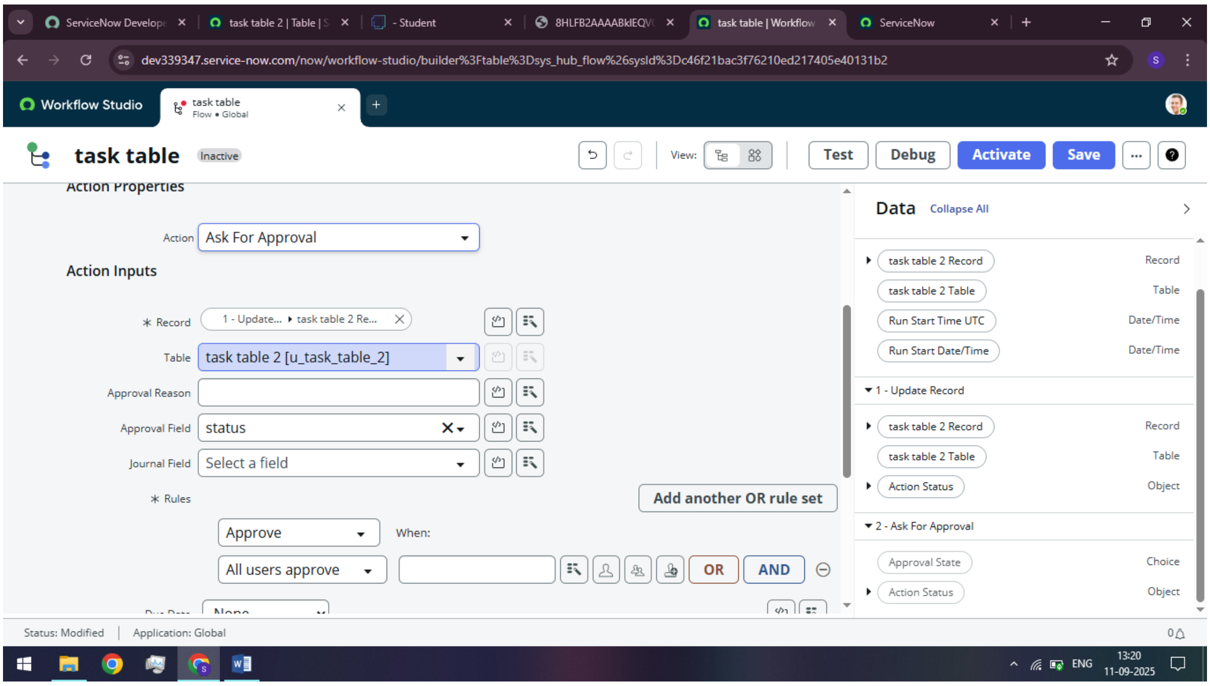
Next step:

1. Click on Add an action.
2. Select action in 3that, 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.

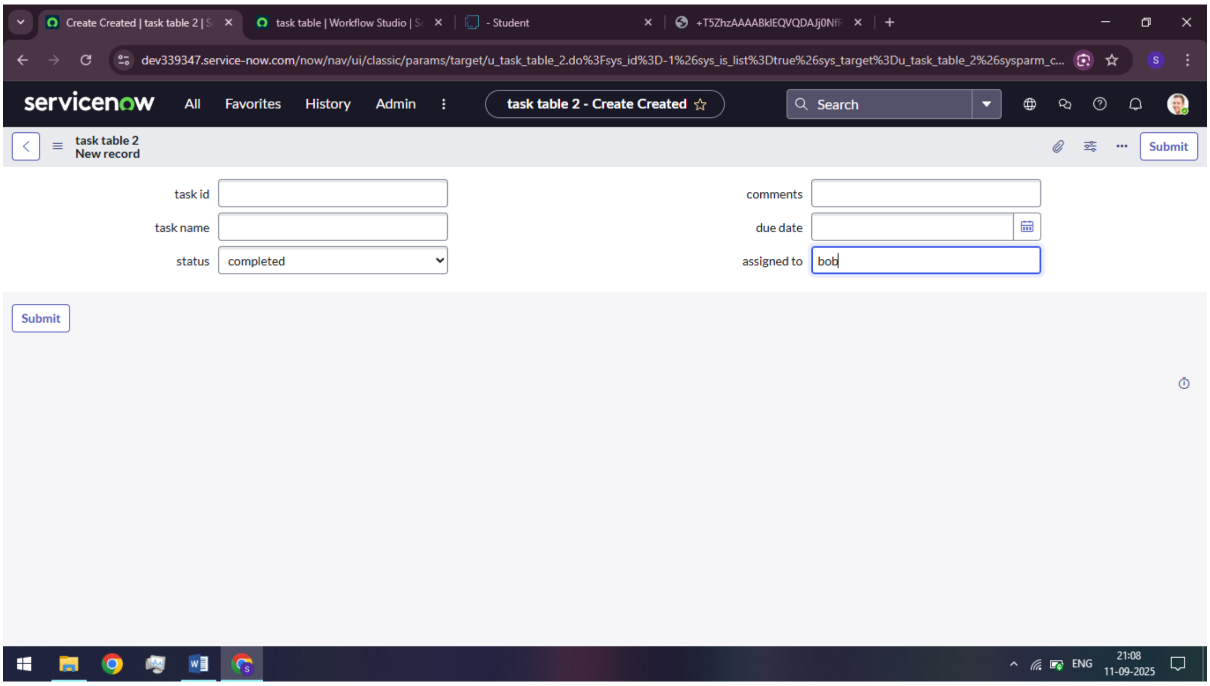


Next step:

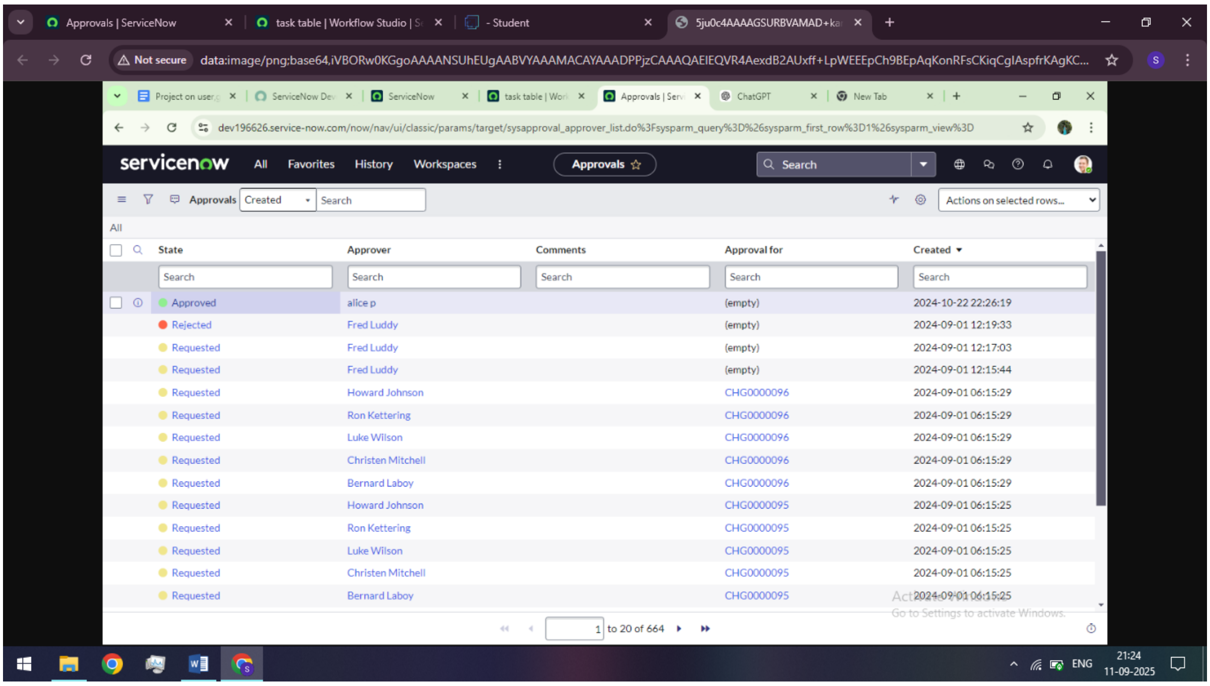
1. Now under Actions.
2. Click on Add an action.
3. Select action in that, search for “ask for approval”.
4. In Record field drag the fields from the data navigation from Right side
5. Table will be auto assigned after that
6. Give the approve field as “ status”
7. Give approver as alice p
8. Click on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



9. Go to application navigator search for task table.
10. It 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



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.