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

Team ID : NM2025TMID17538 Team

Size : 4 Team Leader : CHANDRU.S

Team member : KARTHIK.M

Team member : SARAN. M

Team member : SUNDARRAJAN. K

Problem Statement:

Ina smallprojectmanagement team consisting of a Project Manager (Alice) and a Team Member (Bob), there is a need to efficiently manage project tasks and ensure accountability throughout the project lifecycle. The current system lacks clear role definitions, access controls, and a structured workflow, leading toconfusion regarding task assignments and progress tracking.

Objectives:

Theproject aimsto optimize user, group, and role management by establishing a secure and scalable access control framework integrated with automated workflows. It seeks to simplify the administration of user accounts, streamline group assignments, and enforce role-based access policies to minimize security risks. By implementing centralized controls and approval-driven workflows, the system ensures that access rights are granted appropriately, updated efficiently, and revoked promptly when necessary. Ultimately, the objective is to enhance operational efficiency, strengthen data security, and provide organizations with greater visibility and governance over user access across systems and applications.

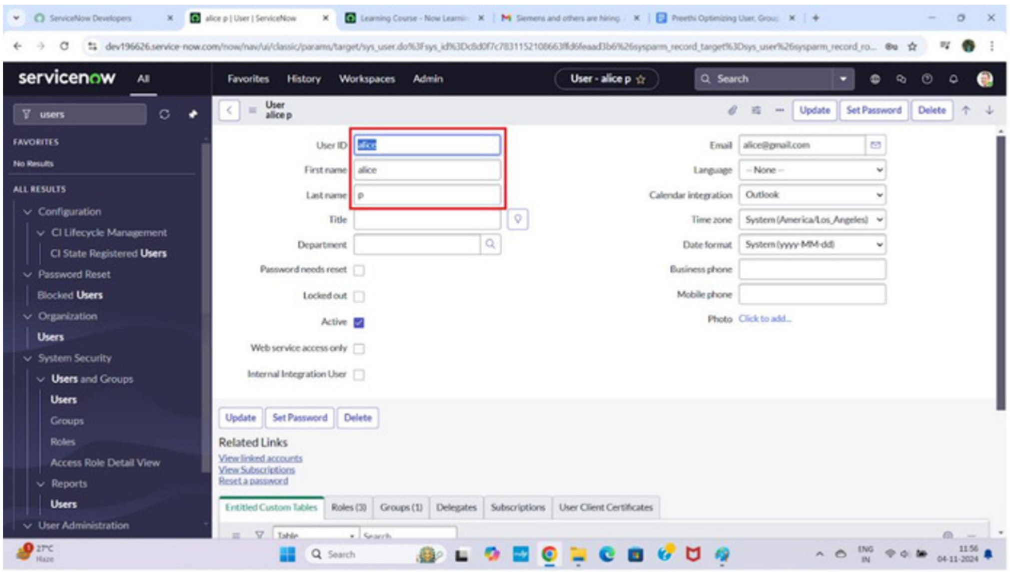
Skills:

1.Oracle DB

Milestone1

Create Users

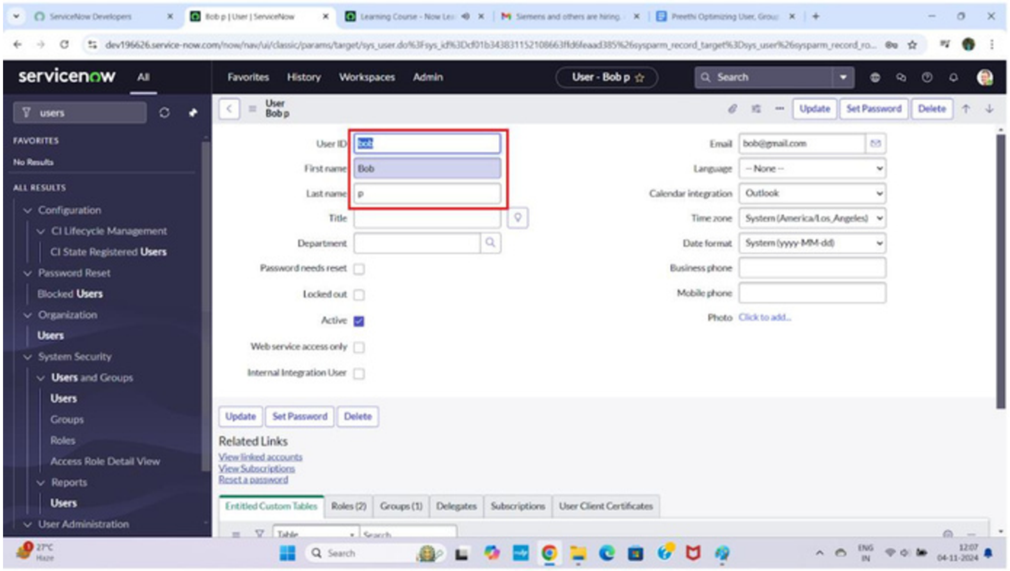
1. Open service now
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user
6. Click on submit



Create one more user:

7. Create another user with the following details

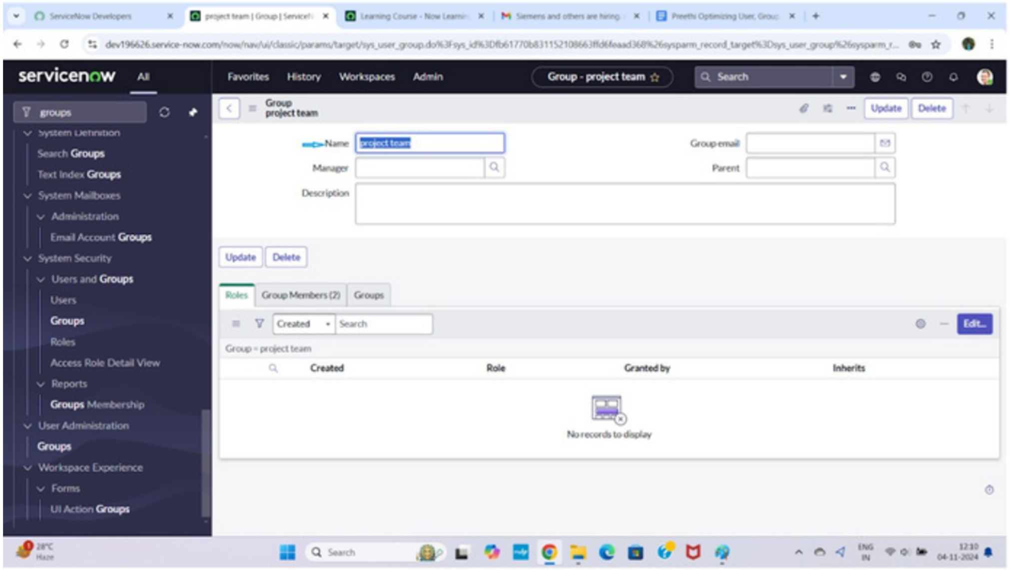
8. Click on submit



Milestone 2

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



Milestone 3

Create Roles

1. Open service now.

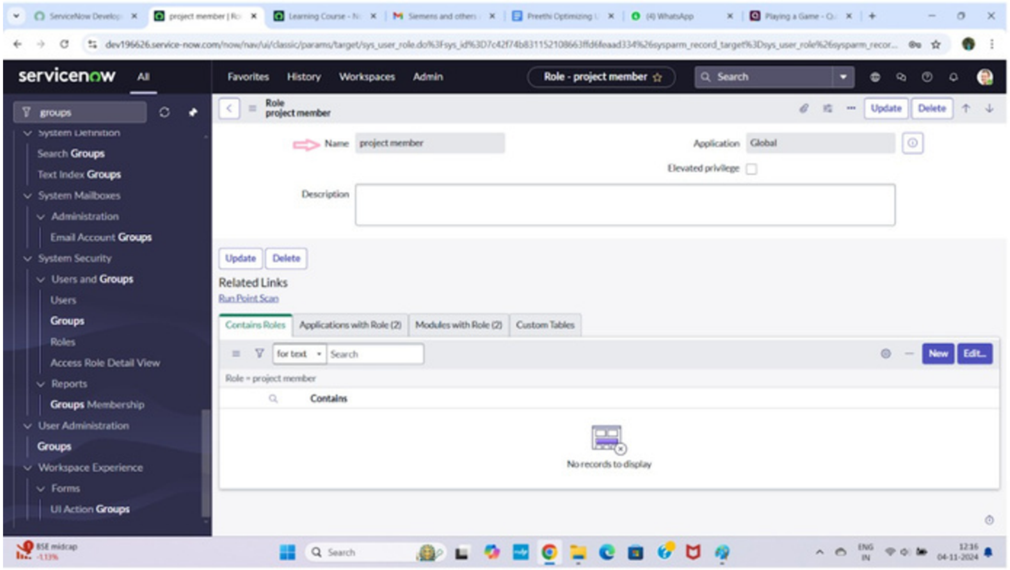
2. Click on All >> search for roles

3. Select roles under system security

4. Click on new

5. Fill the following details to create a new role

6. Click on submit



Createone more role:

7.Create another role with the following details : Team member

8.Click on submit

Milestone 4

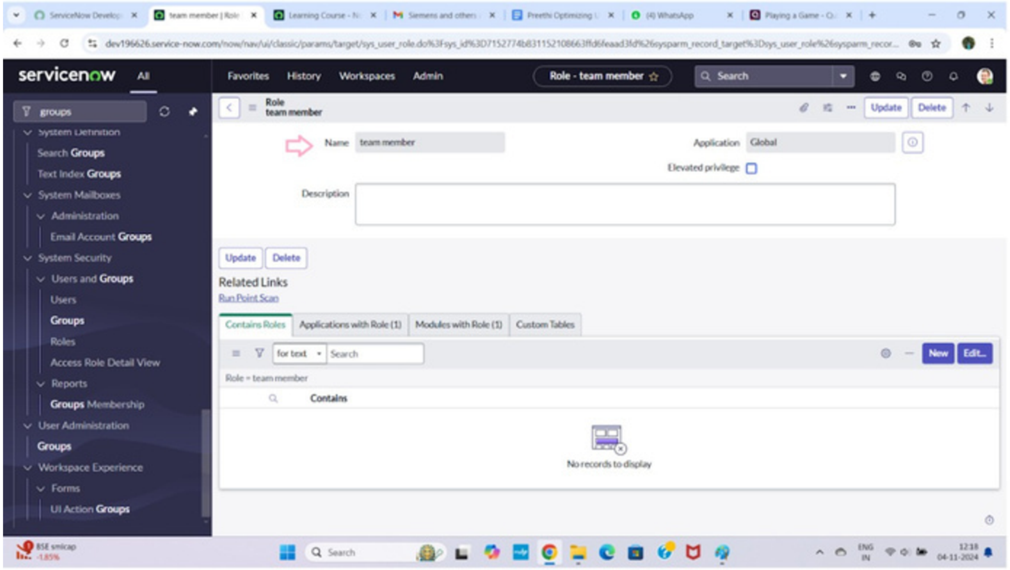
Create Table

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

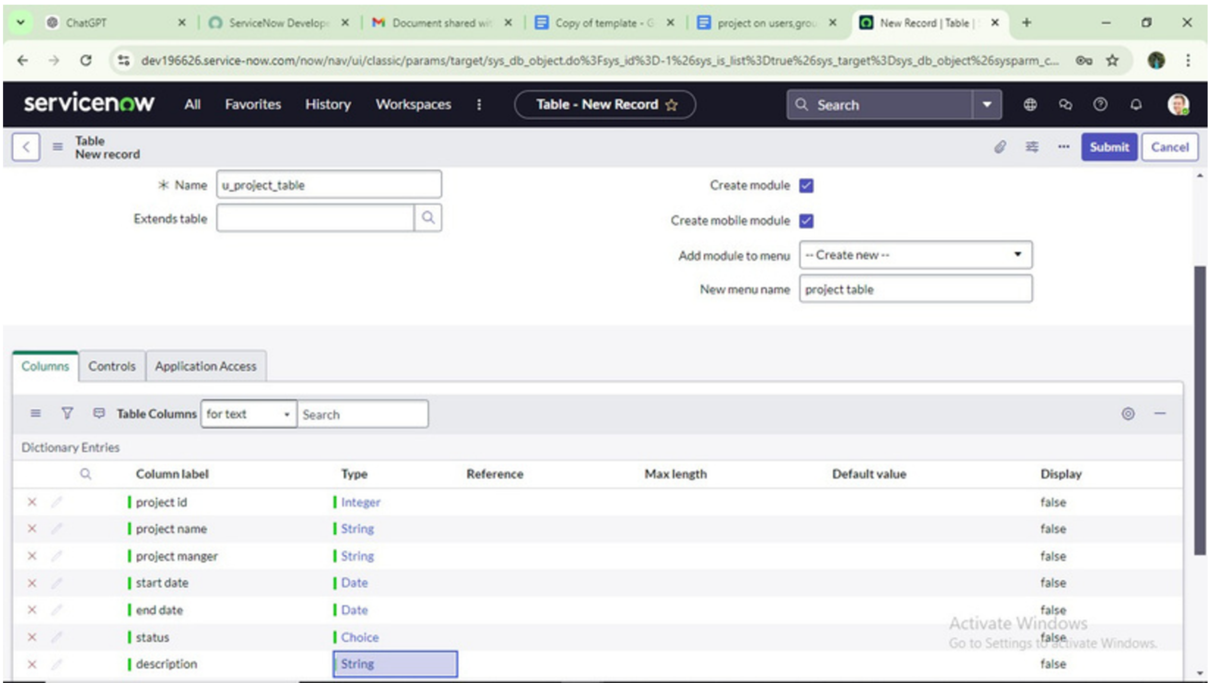
   Label : project table
   Check the boxes Create module & Create mobile module

6. Under new menu name : project table 7.

Under table columns give the columns



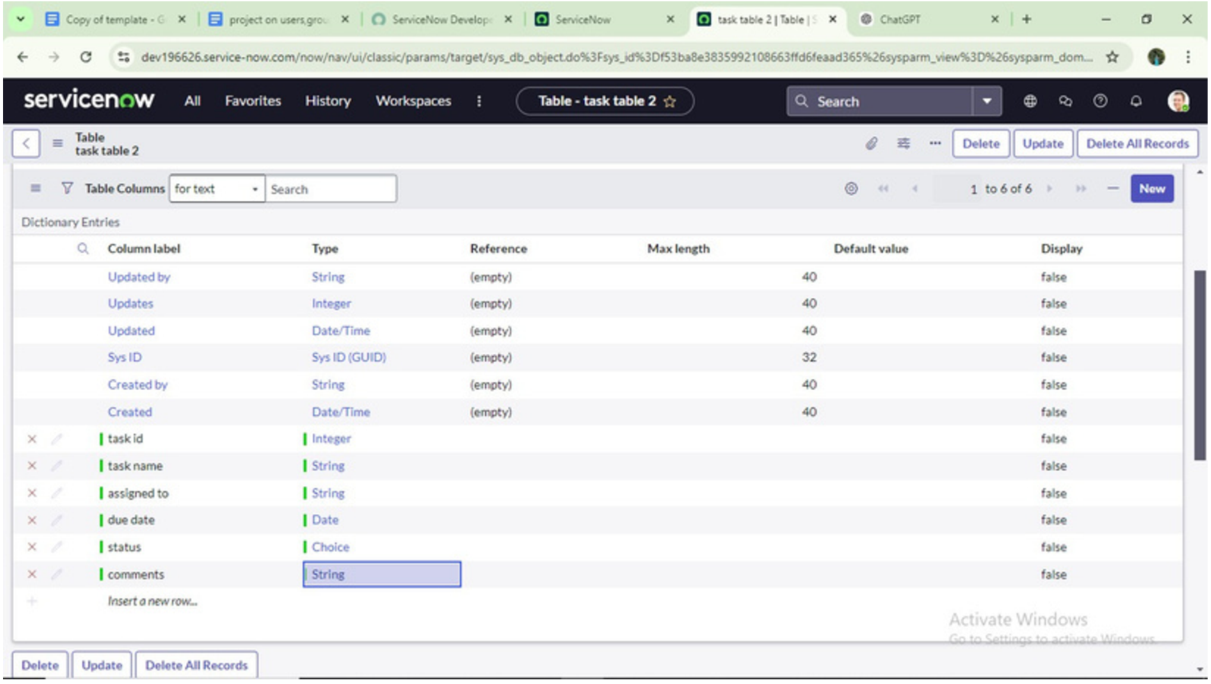
8. Click on submit



Createone more table:

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

10.Click on submit.



Milestone 5

Assign users to project team group

1. 1.Open service now.

2.Click on All >> search for groups

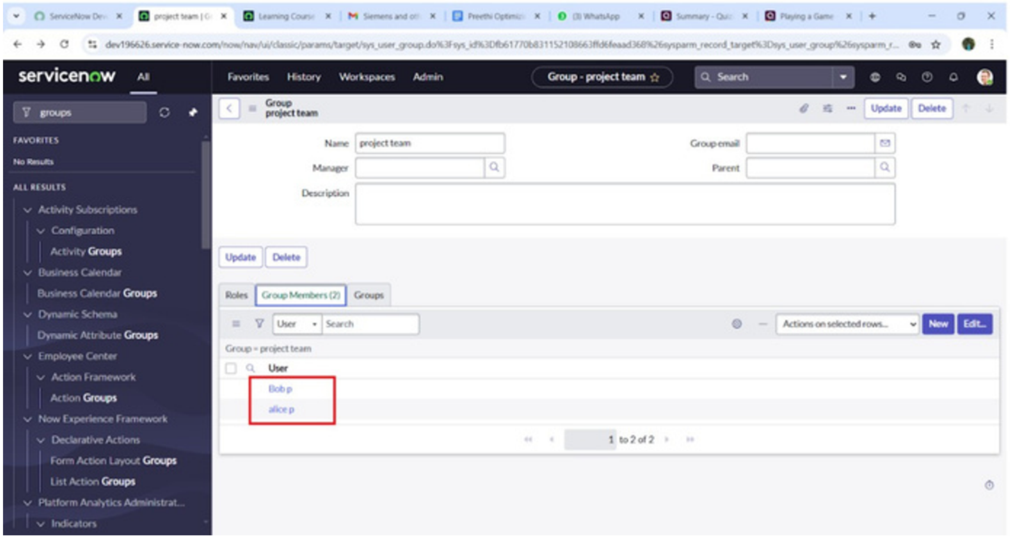
3.Select tables under system definition

4.Select the project team group

5.Under group members

6.Click on edit

7.Select alice p and bob p and save



Milestone 6

Assign roles to alice user

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

2.Select tables under system definition

3.Select the project manager user

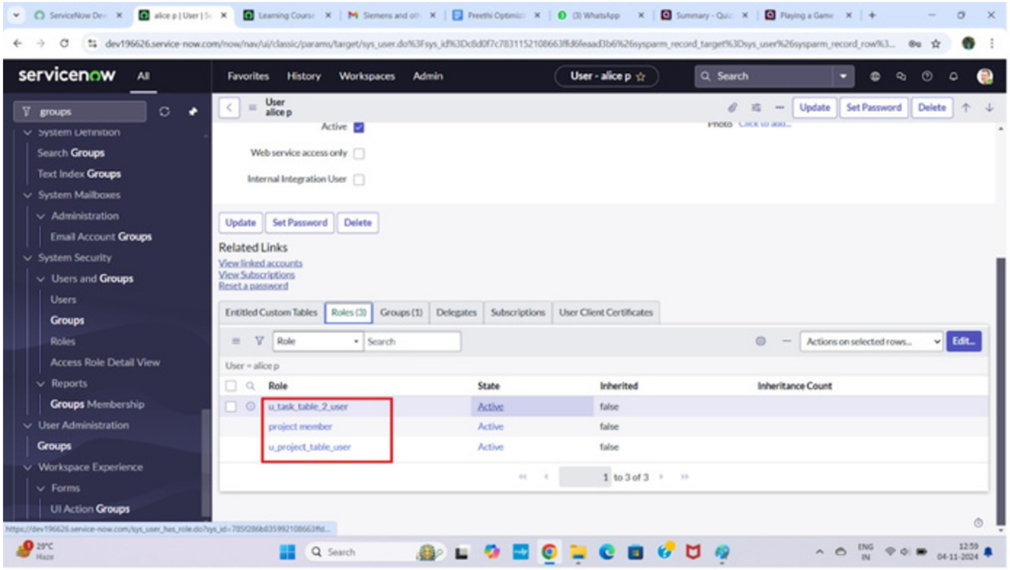
4.Under project manager

5.Click on edit

6.Select project member and save

7.click on edit add u_project_table role and u_task_table role

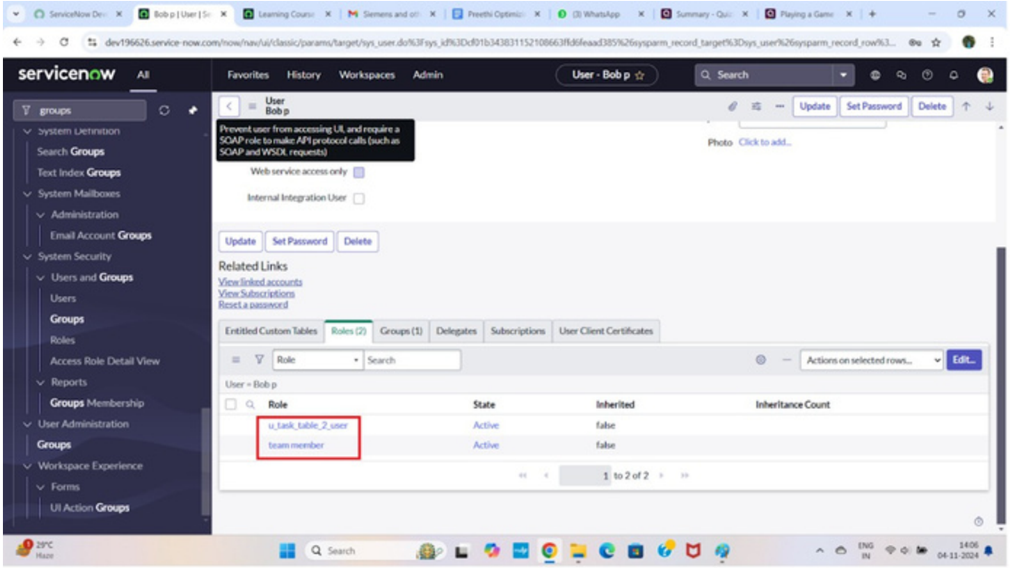
8.click on save and update the form.



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.



Milestone 7

Assign table access to application

while creating a table it automatically create a application and module for that table

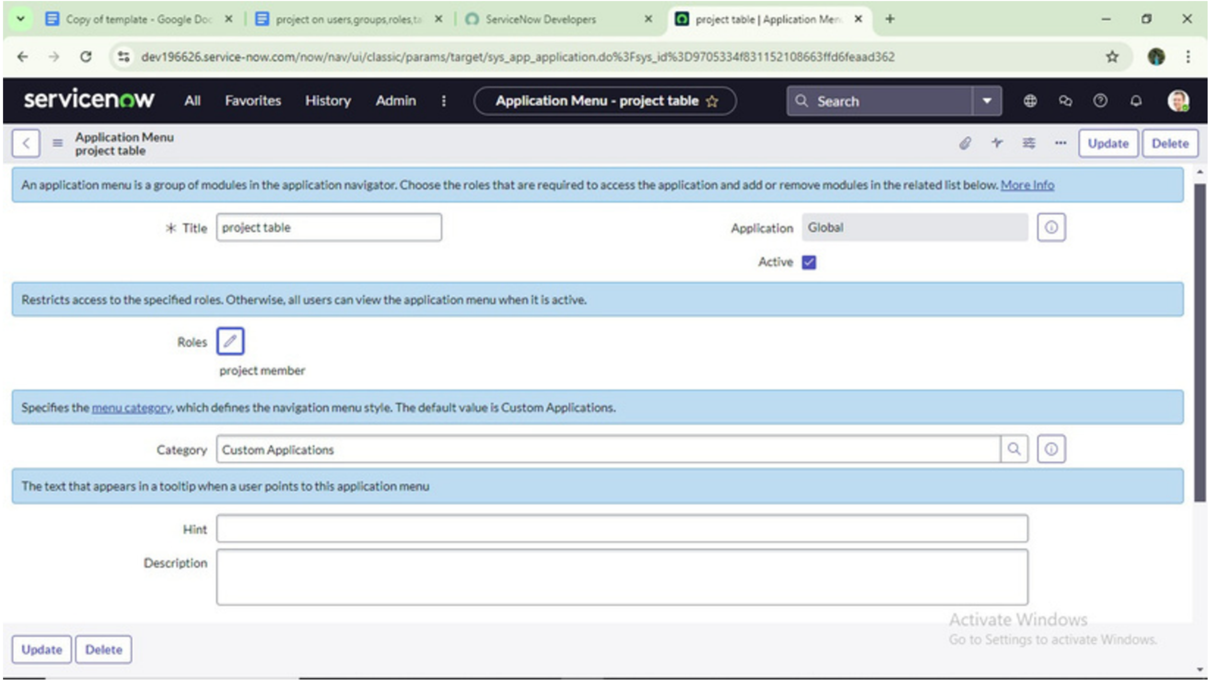
Go to application navigator search for search project table application

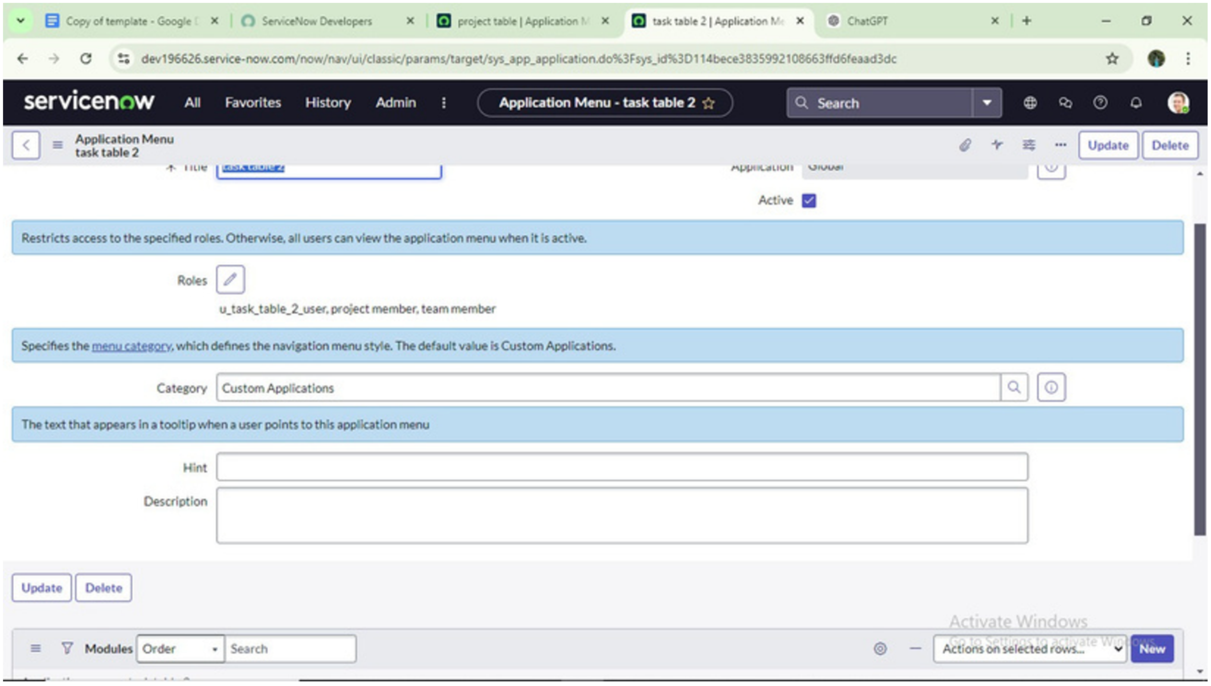
Click on edit module

Give project member roles to that application

Search for task table2 and click on edit application.

Give the project member and team member role for task table 2 application


Copy of template - Google Doc
project on users,groups,roles,t
ServiceNow Developers
project table | Application Men
dev196626.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D9705334f831152108663ffd6feaad362
servicenow
All
Favorites
History
Admin
Application Menu - project table
Search
Application Menu
project table
Update
Delete
An application menu is a group of modules in the application navigator. Choose the roles that are required to access the application and add or remove modules in the related list below. More Info
Title
project table
Application
Global
Active
Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.
Roles
project member
Specifies the menu category, which defines the navigation menu style. The default value is Custom Applications.
Category
Custom Applications
The text that appears in a tooltip when a user points to this application menu
Hint
Description
Activate Windows
Go to Settings to activate Windows.
Update
Delete


Copy of template - Google
ServiceNow Developers
project table | Application M
task table 2 | Application Me
ChatGPT
dev196626.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D114bece3835992108663ffd6feaad3dc
servicenow
All
Favorites
History
Admin
Application Menu - task table 2
Search
Application Menu
task table 2
Update
Delete
Active
Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.
Roles
u_task_table_2_user, project member, team member
Specifies the menu category, which defines the navigation menu style. The default value is Custom Applications.
Category
Custom Applications
The text that appears in a tooltip when a user points to this application menu
Hint
Description
Update
Delete
Activate Windows
Modules
Order
Search
Actions on selected rows...
New

Milestone 8

Create ACL

Open service now.

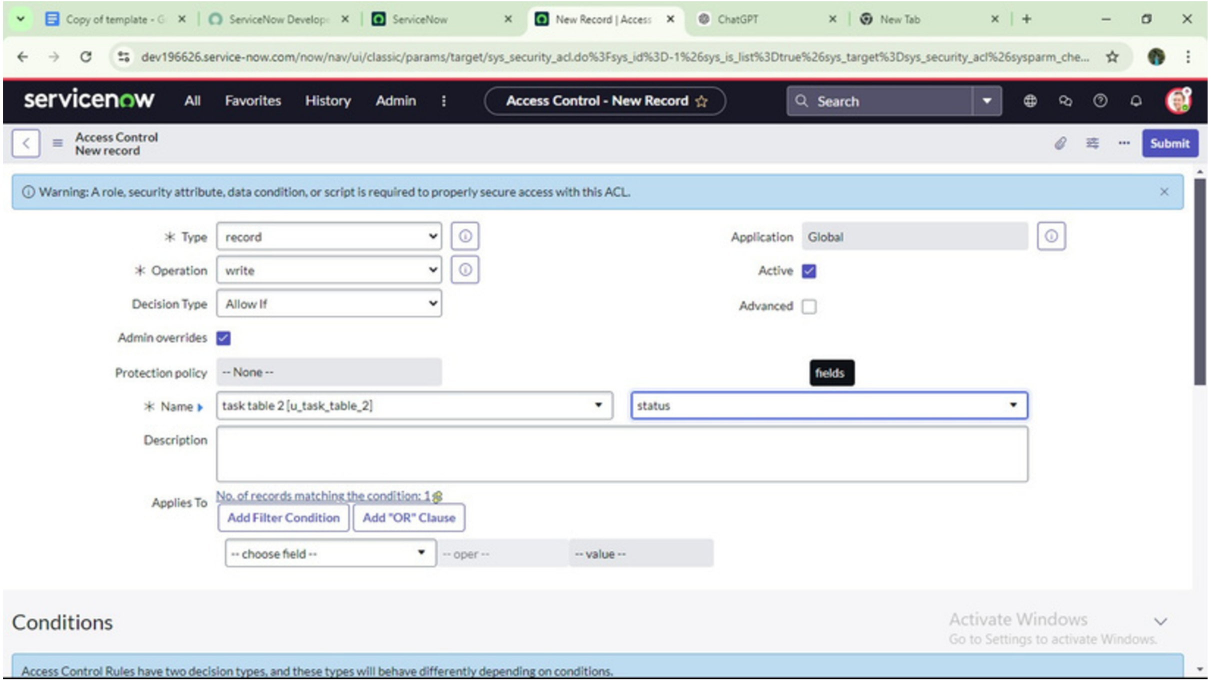
Click on All >> search for ACL

Select Access Control(ACL) under system security

Click on elevate role

Click on new

Fill the following details to create a new ACL



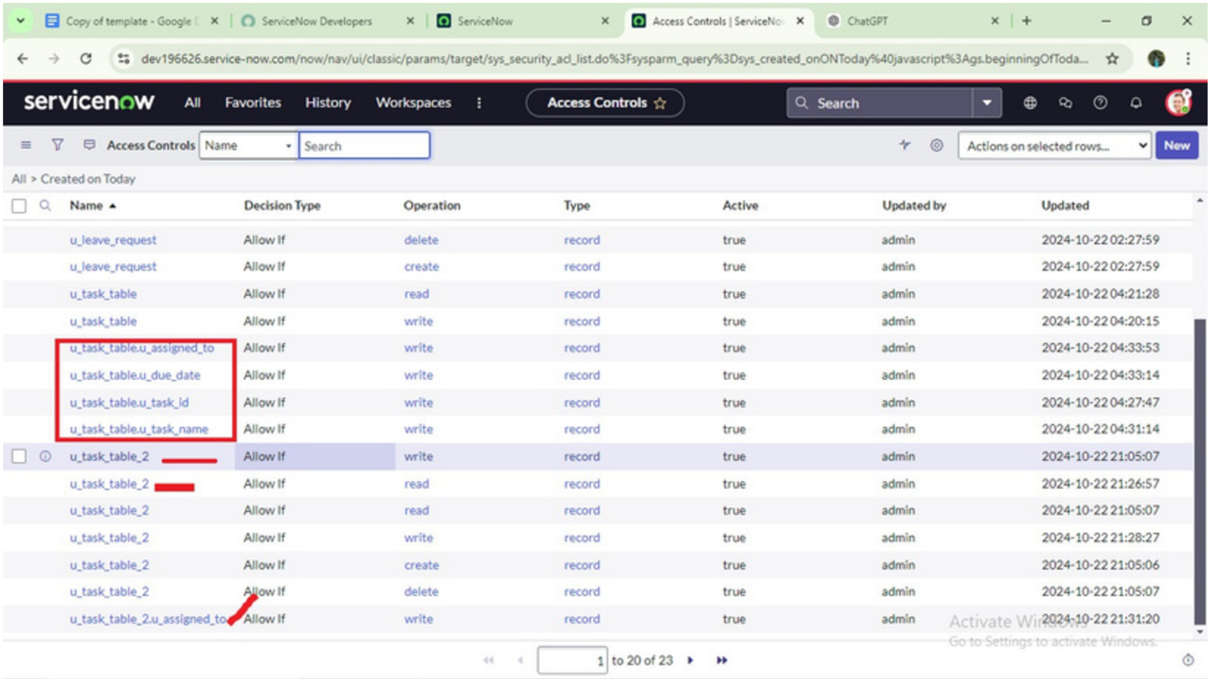
Scroll down under requires role

Double click on insert a new row

Give task table and team member role

Click on submit

Similarly create 4 acl for the following fields



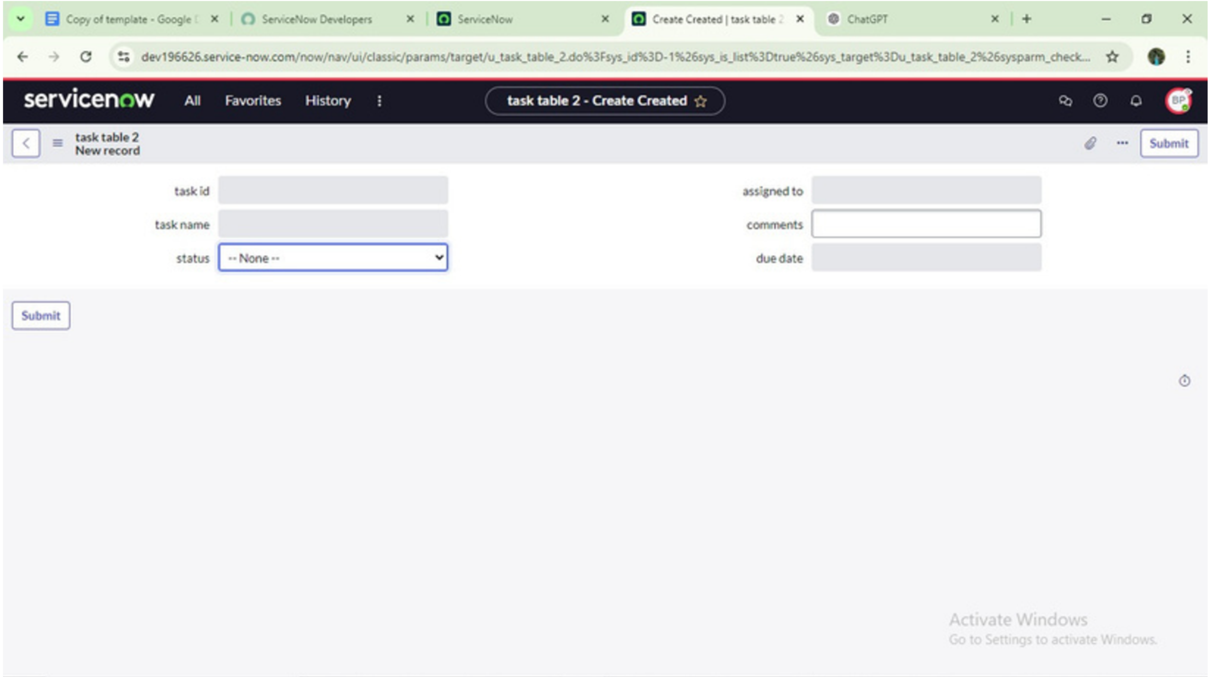
12.Click on profile on top right side

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



Milestone 9

Create a Flow to Assign operations ticket to group

Open service now.

Click on All >> search for Flow Designer

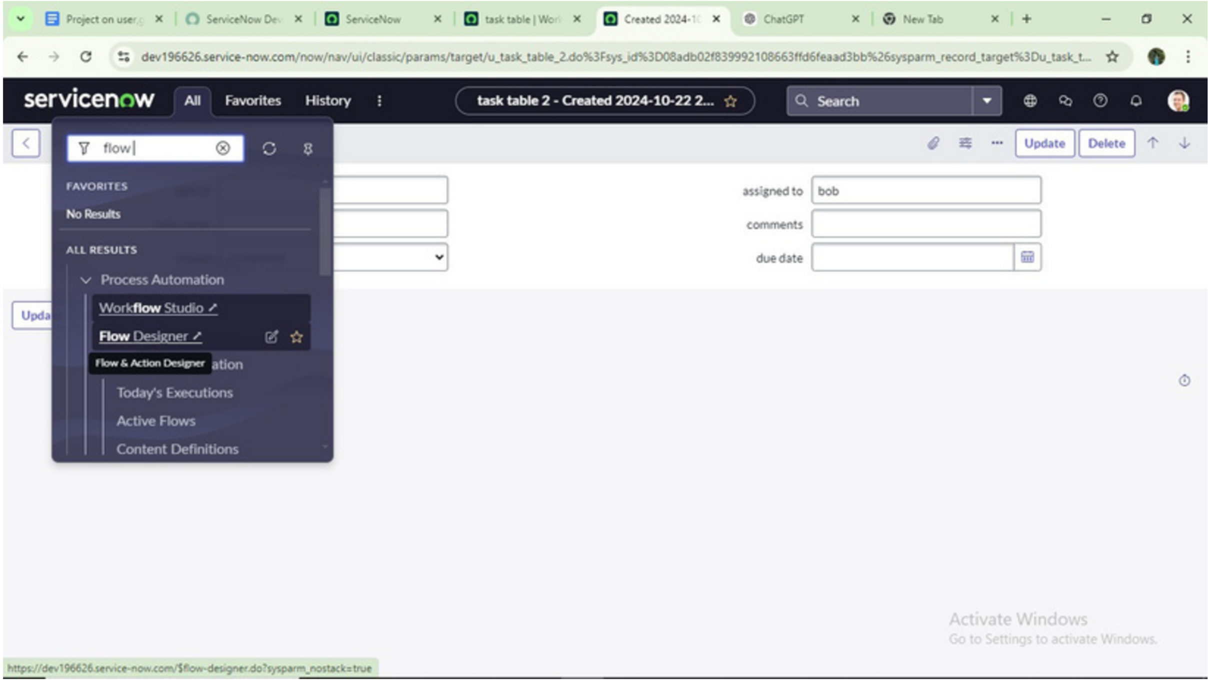
Click on Flow Designer under Process Automation.

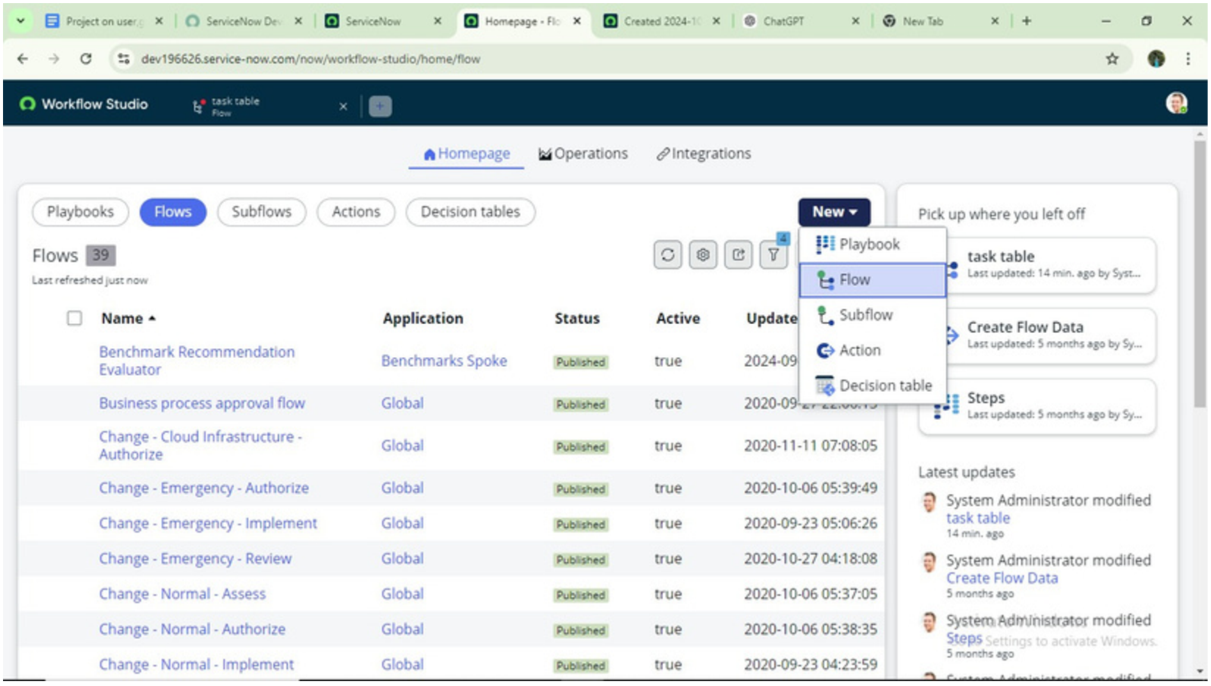
After opening Flow Designer Click on new and select Flow.

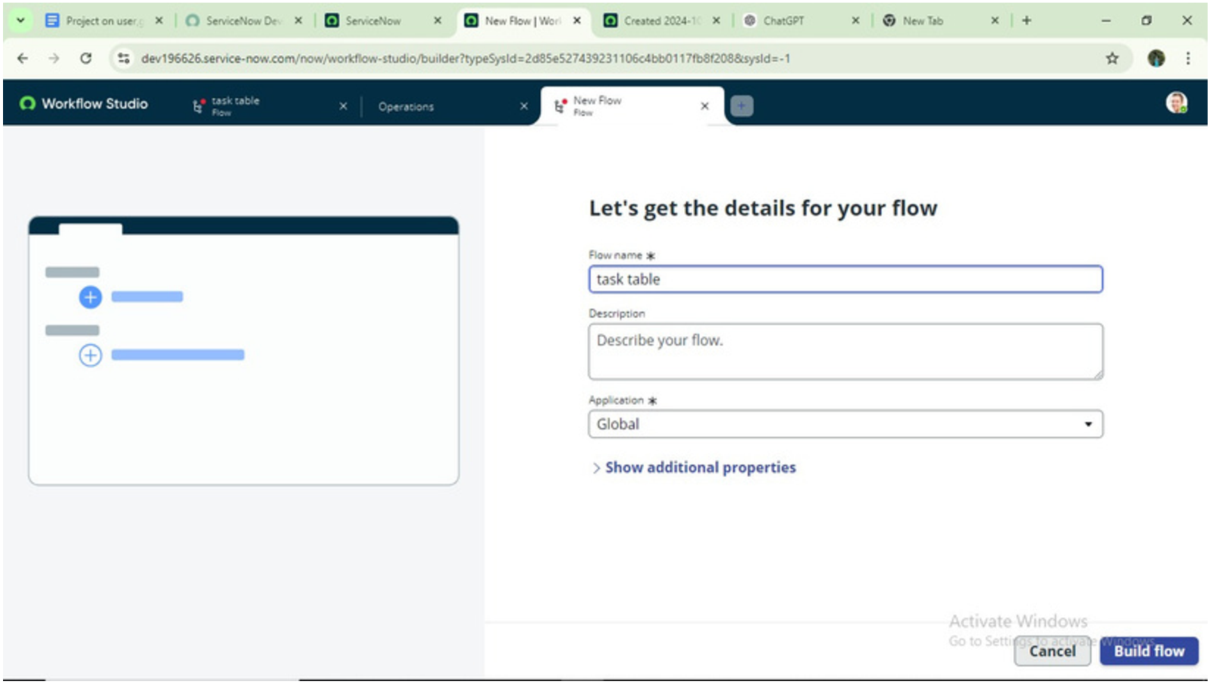
Under Flow properties Give Flow Name as “ task table”.

Application should be Global.

Click build flow.


dev196626.service-now.com/now/nav/ui/classic/params/target/u_task_table_2.do%3Fsys_id%3D08adb02f839992108663ffd6feaad3bb%26sysparm_record_target%3Du_task_t...
servicenow
All
Favorites
History
task table 2 - Created 2024-10-22 2...
Search
flow
FAVORITES
No Results
ALL RESULTS
Process Automation
Workflow Studio
Flow Designer
Flow & Action Designer
Today's Executions
Active Flows
Content Definitions
Update
Delete
assigned to
bob
comments
due date
Activate Windows
Go to Settings to activate Windows.
https://dev196626.service-now.com/$flow-designer.do?sysparm_nostack=true


dev196626.service-now.com/now/workflow-studio/home/flow
Workflow Studio
task table
Homepage
Operations
Integrations
Playbooks
Flows
Subflows
Actions
Decision tables
New
Playbook
Flow
Subflow
Action
Decision table
Flows 39
Last refreshed just now
Name
Application
Status
Active
Benchmark Recommendation Evaluator
Benchmarks Spoke
Published
true
Business process approval flow
Global
Change - Cloud Infrastructure - Authorize
2020-11-11 07:08:05
Change - Emergency - Authorize
2020-10-06 05:39:49
Change - Emergency - Implement
2020-09-23 05:06:26
Change - Emergency - Review
2020-10-27 04:18:08
Change - Normal - Assess
2020-10-06 05:37:05
Change - Normal - Authorize
2020-10-06 05:38:35
Change - Normal - Implement
2020-09-23 04:23:59
Pick up where you left off
task table
Last updated: 14 min. ago by Syst...
Create Flow Data
Last updated: 5 months ago by Sy...
Steps
Last updated: 5 months ago by Sy...
Latest updates
System Administrator modified
task table
14 min. ago
System Administrator modified
Create Flow Data
5 months ago
System Administrator modified
Steps
5 months ago



next step:

Click on Add a trigger

Select the trigger in that Search for “create record” and select that.

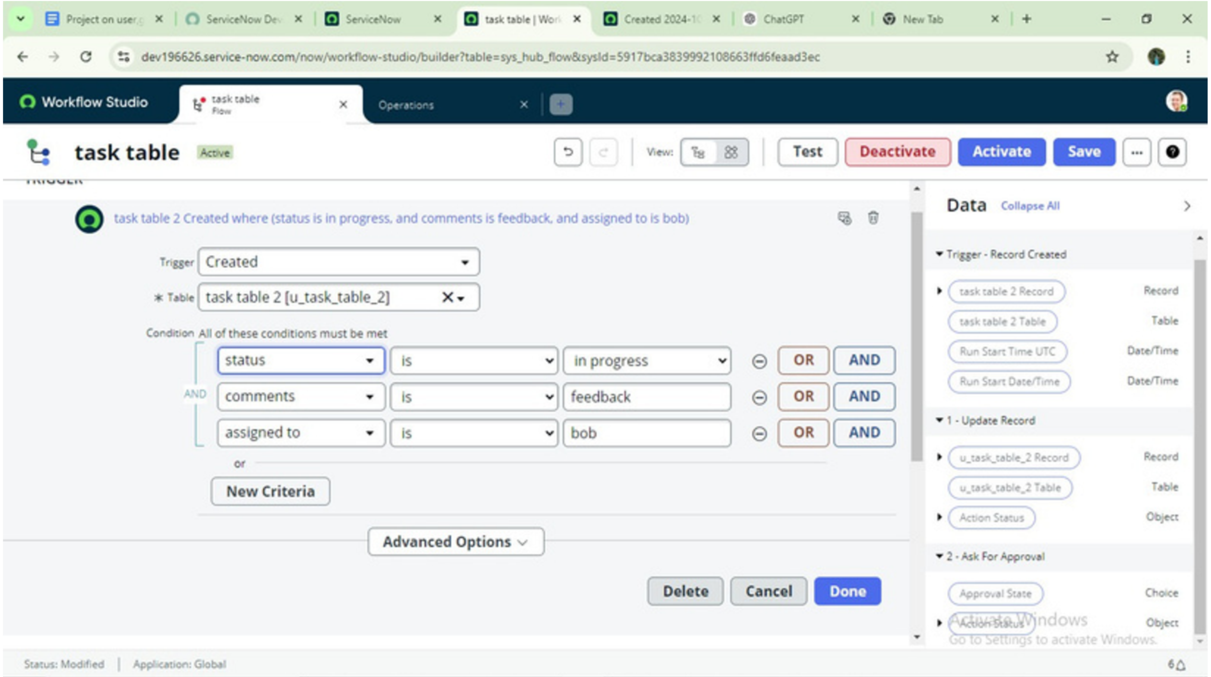
Give the table name as “ task table ”.

Give the Condition as Field : status Operator :is Value : in progress

Field : comments Operator :is Value : feedback

Field : assigned to Operator :is Value : bob

After that click on Done.



Next step:

Click on Add an action.

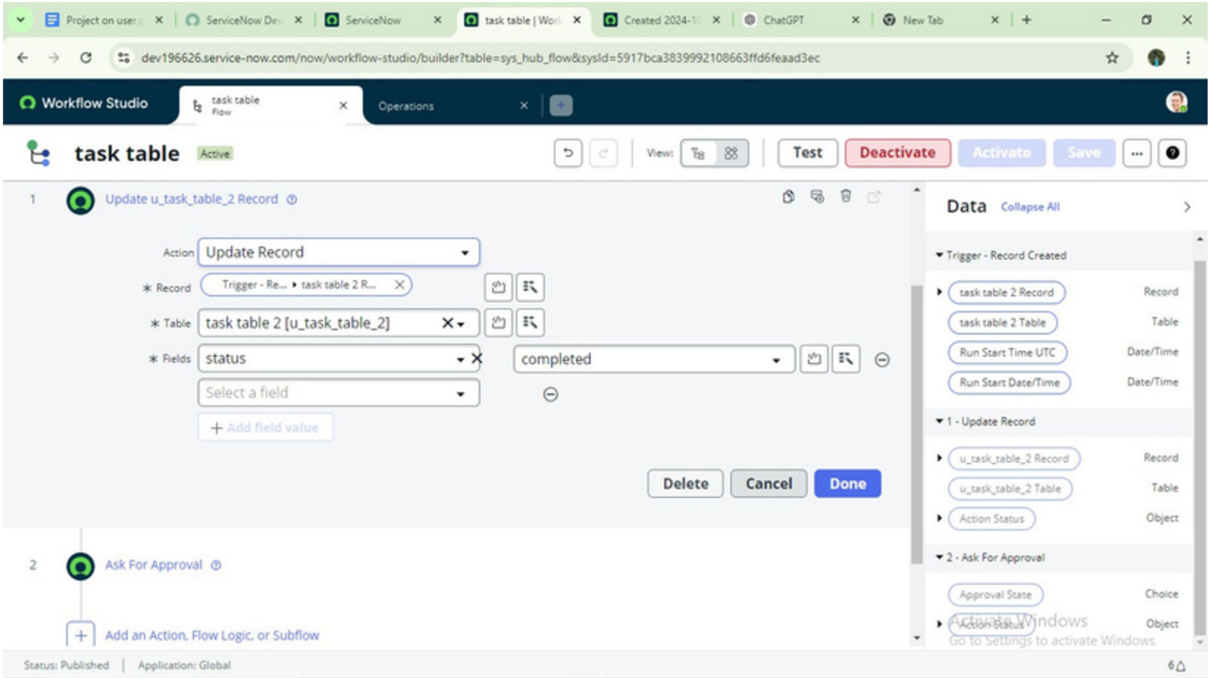
Select action in that ,search for “ update records”.

In Record field drag the fields from the data navigation from Right Side(Data pill)

Table will be auto assigned after that

Add fields as “status” and value as “completed”

Click on Done.



Next step:

Now under Actions.

Click on Add an action.

Select action in that ,search for “ ask for approval ”.

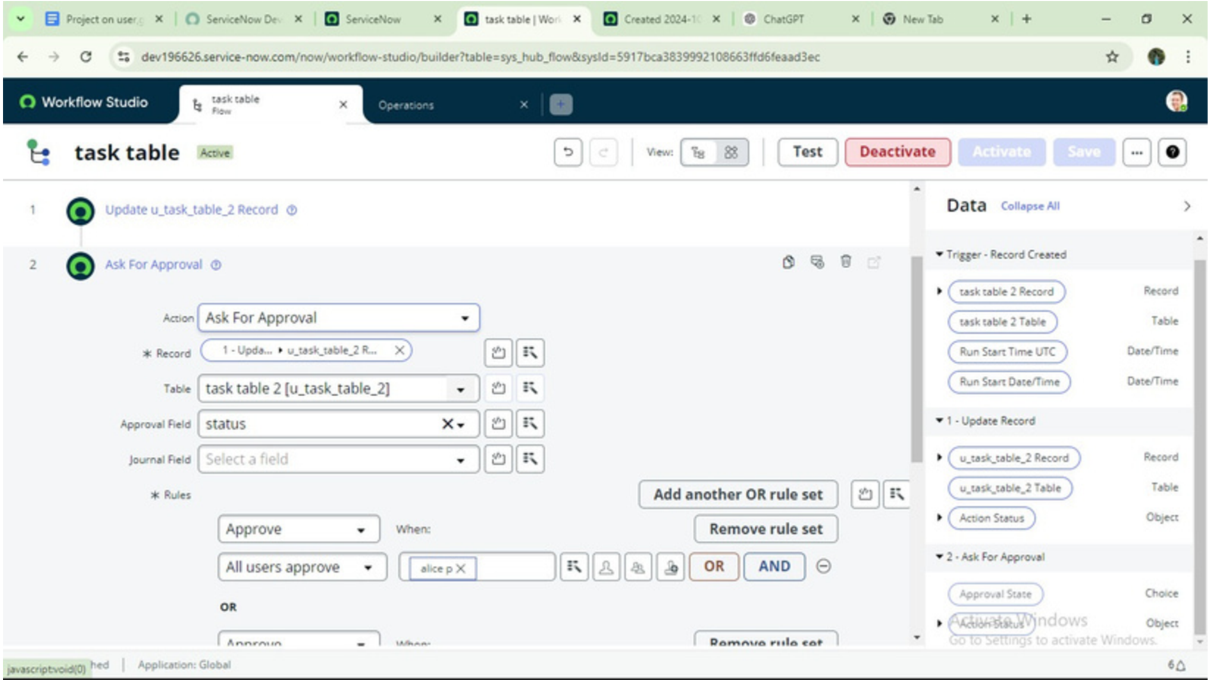
In Record field drag the fields from the data navigation from Right side

Table will be auto assigned after that

Give the approve field as “ status”

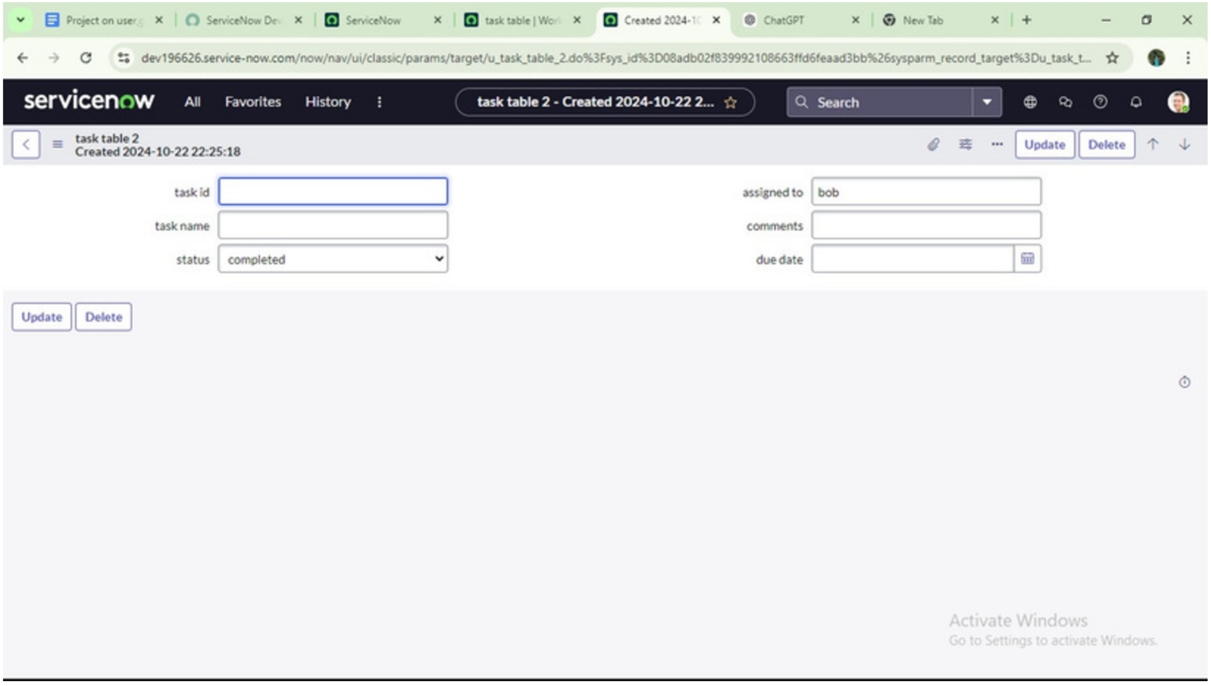
Give approver as alice p

Click on Done.



9.Go to application navigator search for task table.

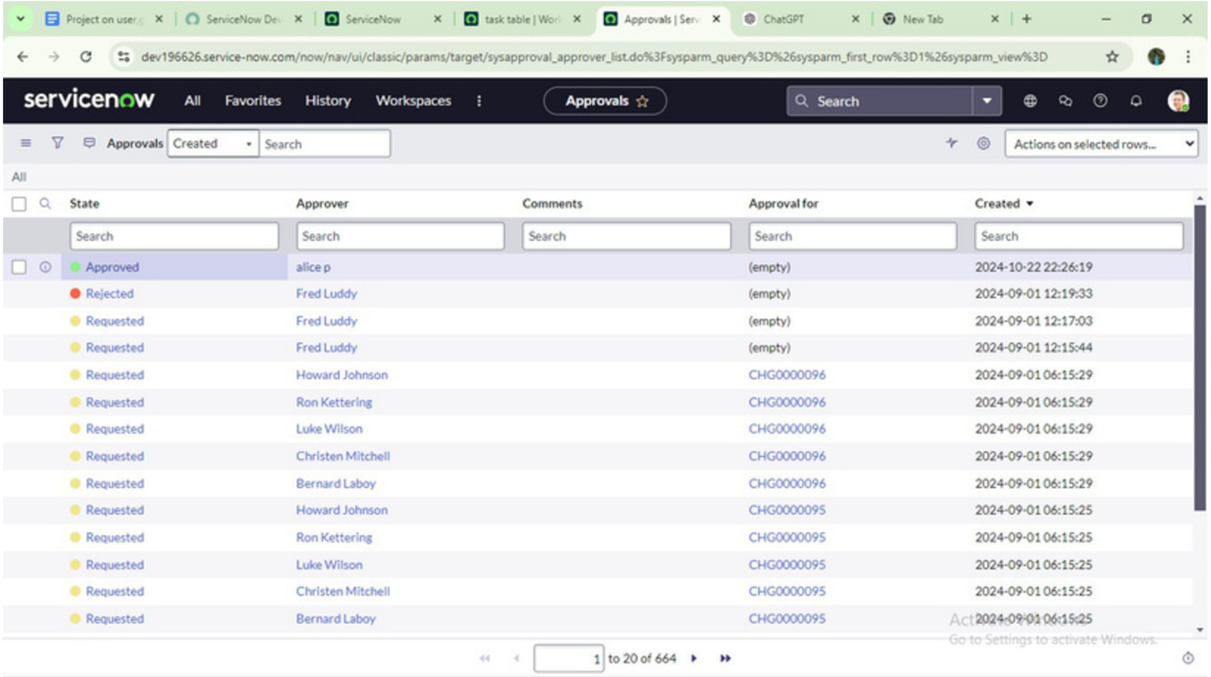
10.It status field is updated to completed



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.