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

Team Id: NM2025TMID14060

Team Members:

Team Leader : FRANCLIN V

Team Member 1 : MADESWARAN M

Team Member 2 : HARIKRISHNAN R

Team Member 3 : LINGAMUTHURAM A

Problem Statement:

In a small project management team comprising a Project Manager (Alice) and a Team Member (Bob), there is a pressing need to enhance task management and ensure clear accountability throughout the project lifecycle. The existing system suffers from vague role definitions, insufficient access controls, and the absence of a structured workflow. As a result, confusion often arises regarding task assignments, responsibilities, and progress tracking

Objective:

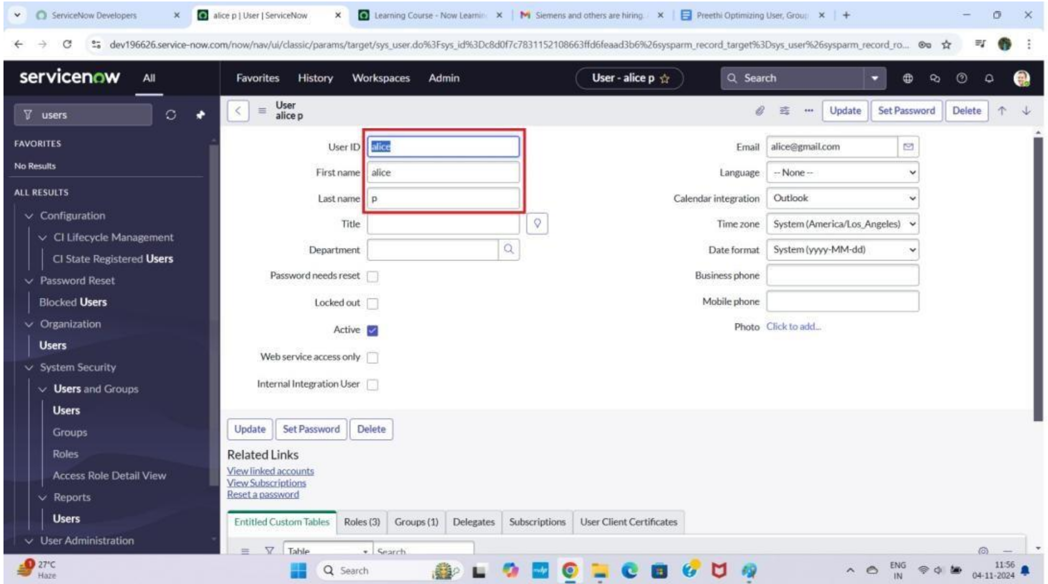
1. Centralize user, group, and role management.
2. Enforce secure role-based access control (RBAC).
3. Automate user provisioning and de-provisioning.
4. Ensure compliance through audit and approval workflows.
5. Improve user experience with self-service access.

TASK INITIATION

Milestone 1 : Users

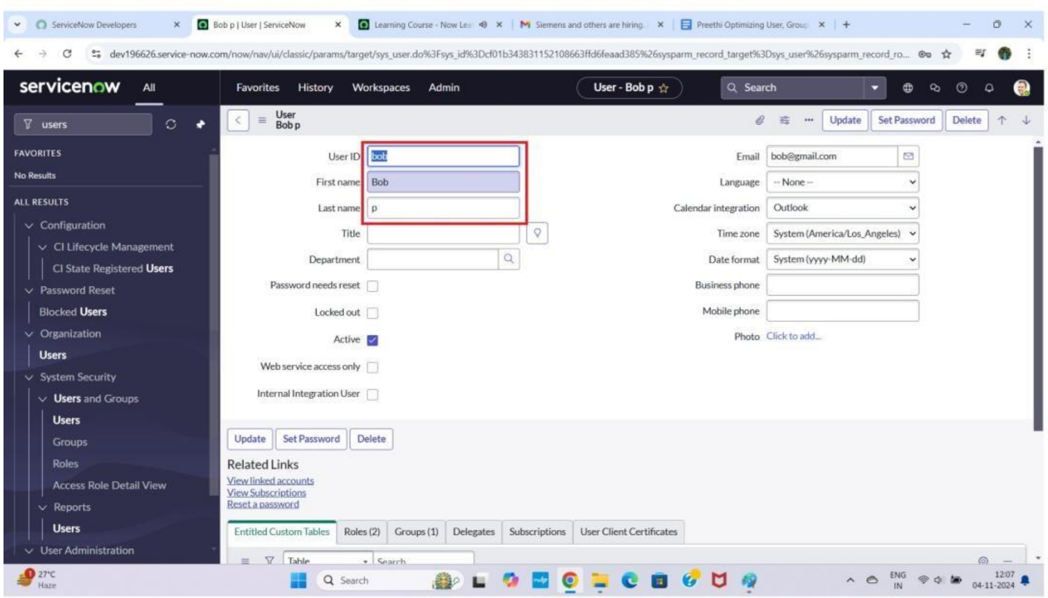
Activity 1: Create Users

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:

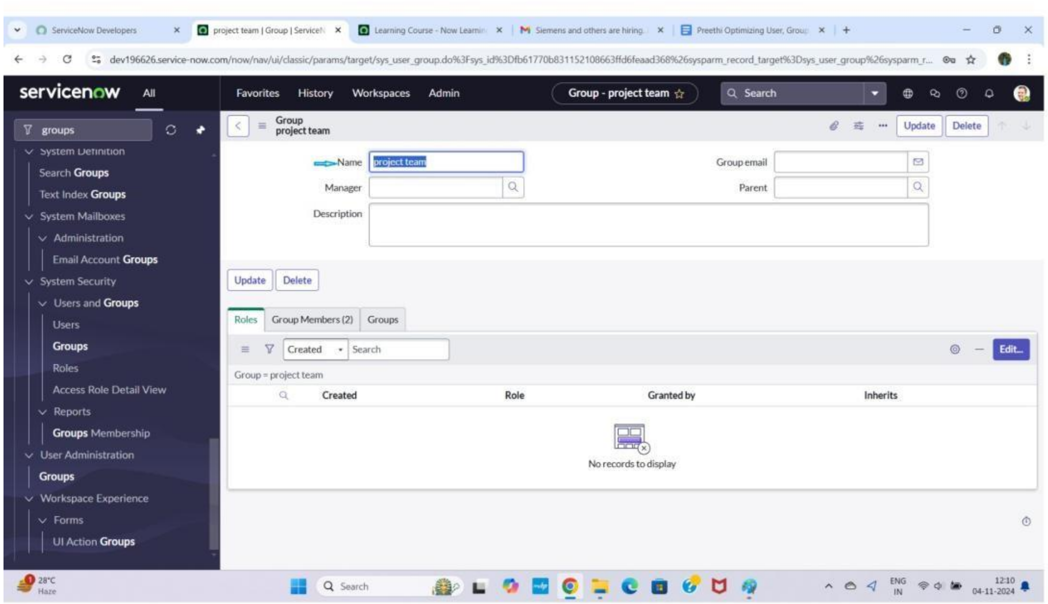
7. Create another user with the following details
8. Click on submit



Milestone 2 : Groups

Activity 1: Create Groups

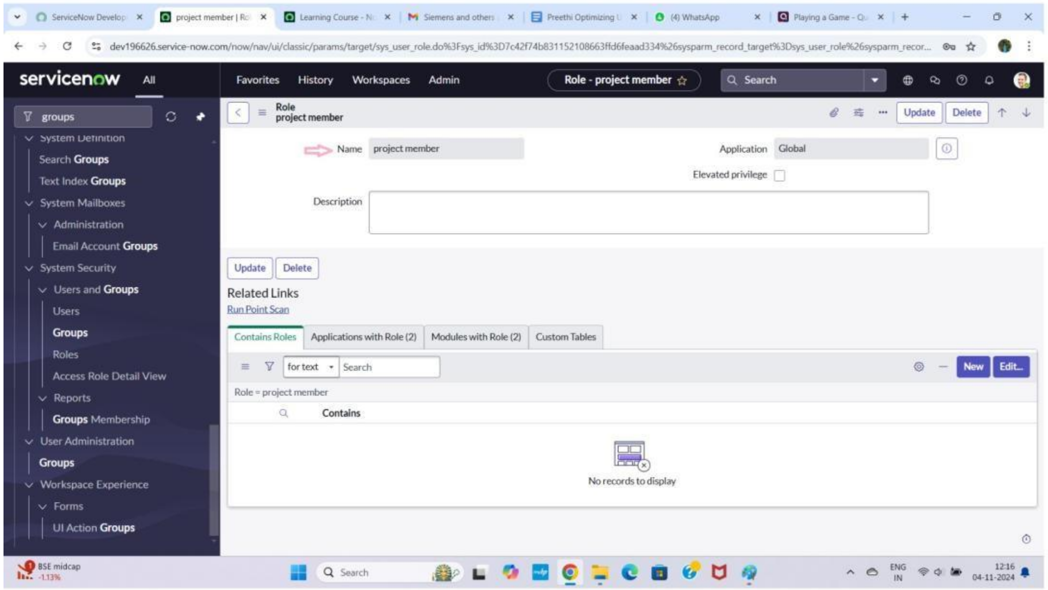
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



Milestone 3 : Roles

Activity 1: 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

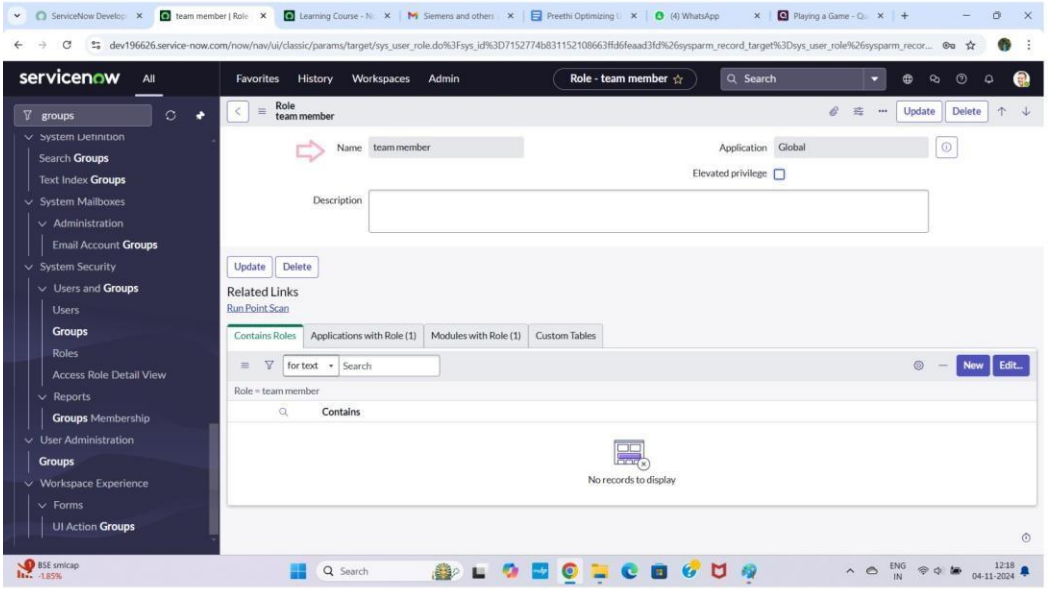
8.Click on submit

Milestone 4 : Table Activity 1: Create Table

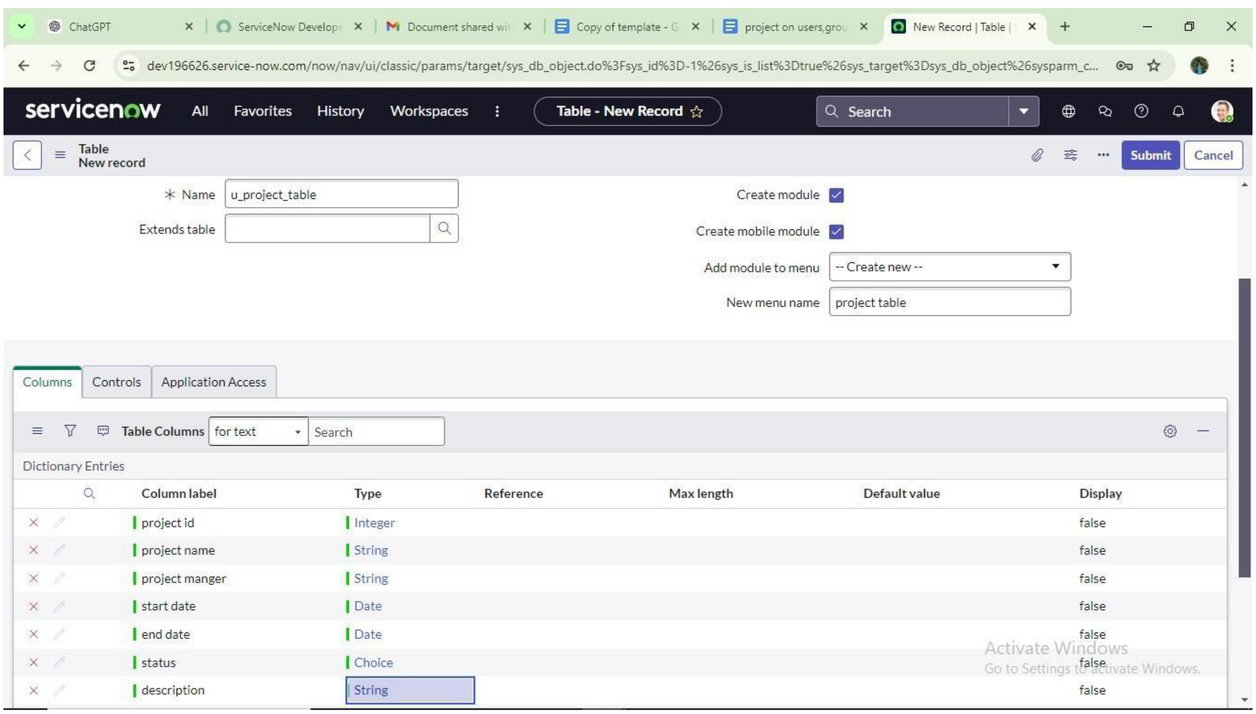
1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table

   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



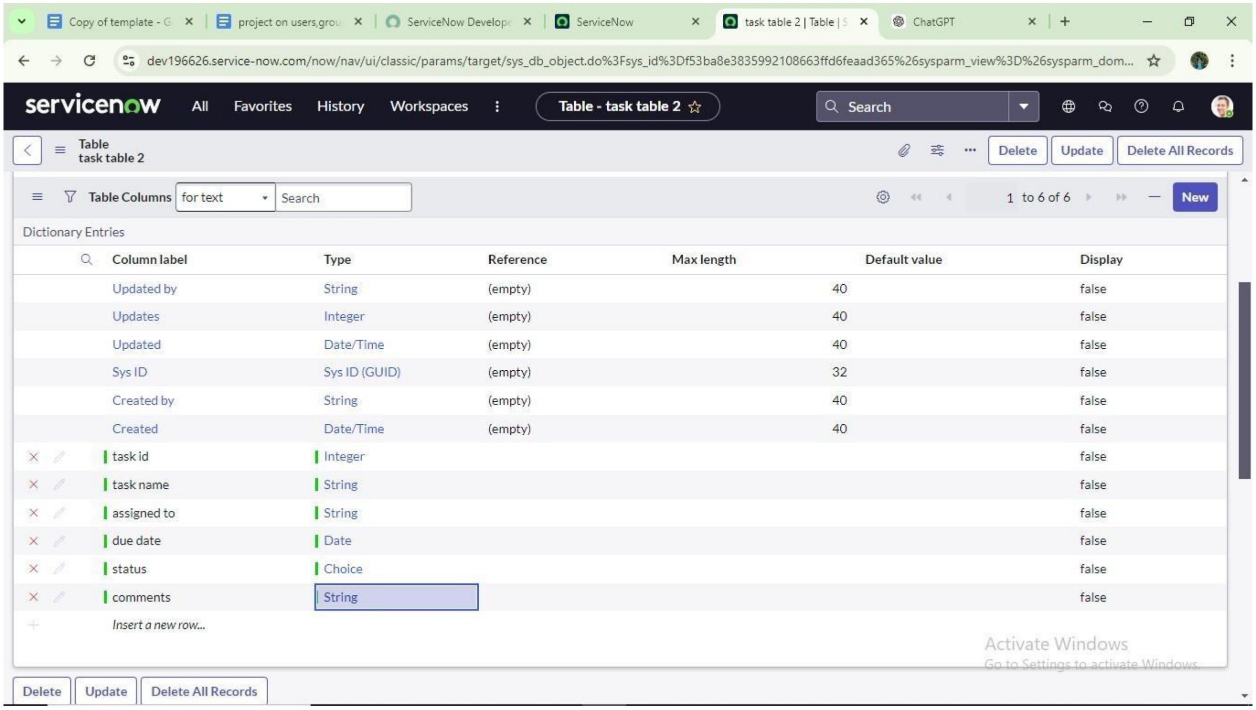
8. Click on submit



Create one more table:

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

10. Click on submit.



Milestone 5 : Assign users to groups

Activity 1: Assign users to project team group

1.Open service now.

2.Click on All >> search for groups

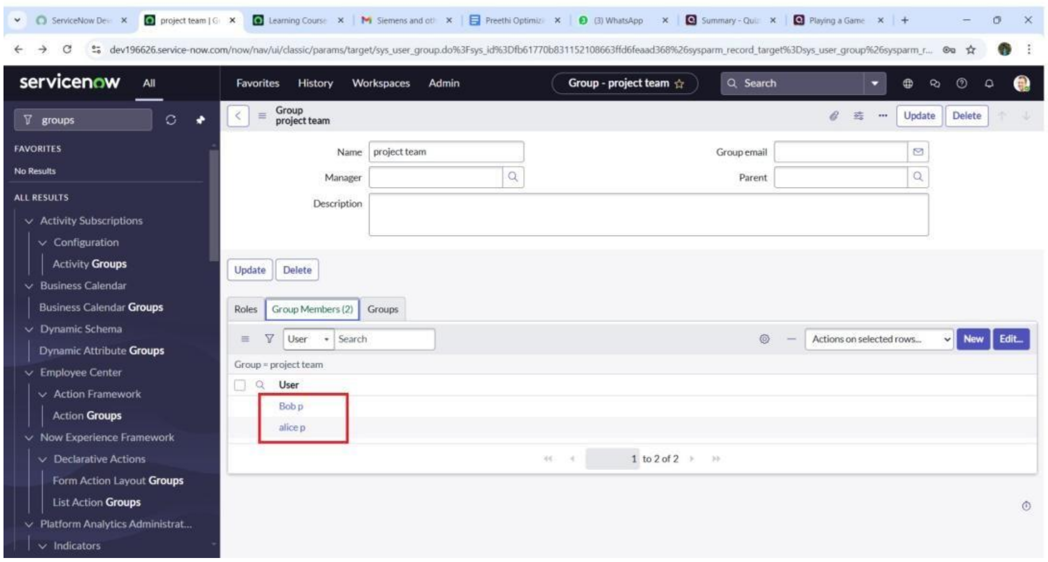
3.Select tables under system definition

4.Select the project team group

5.Under group members

6.Click on edit

7.Select alice p and bob p and save

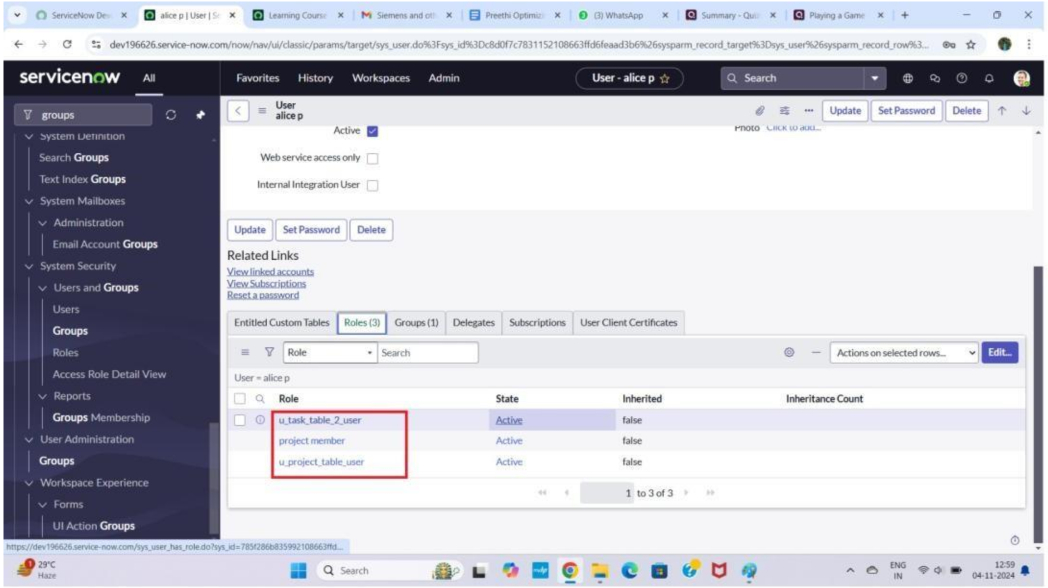


Milestone 6 : Assign roles to users

Activity 1: Assign roles to alice user

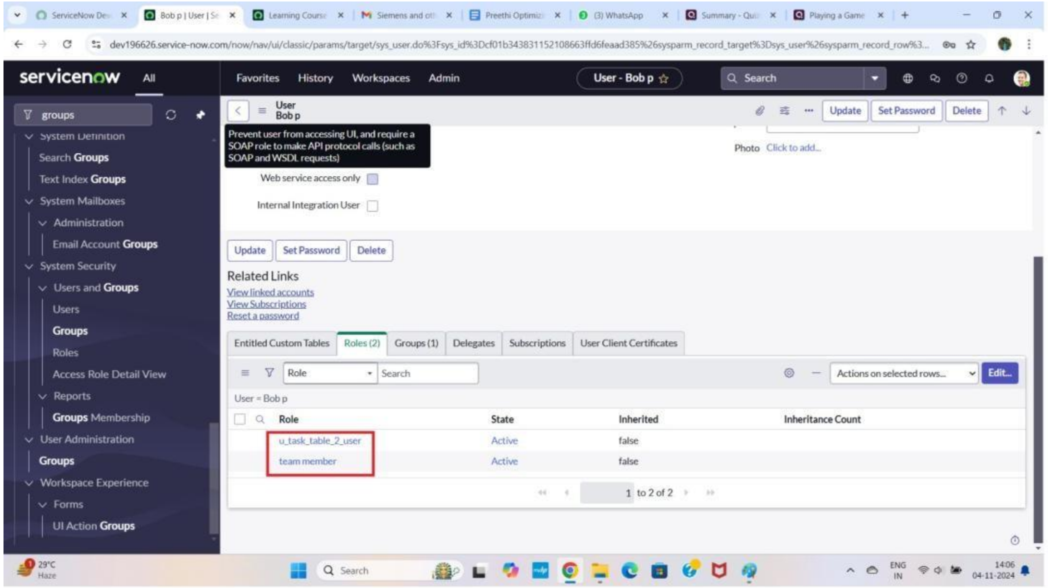
1.Open servicenow.Click on All >> search for user

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

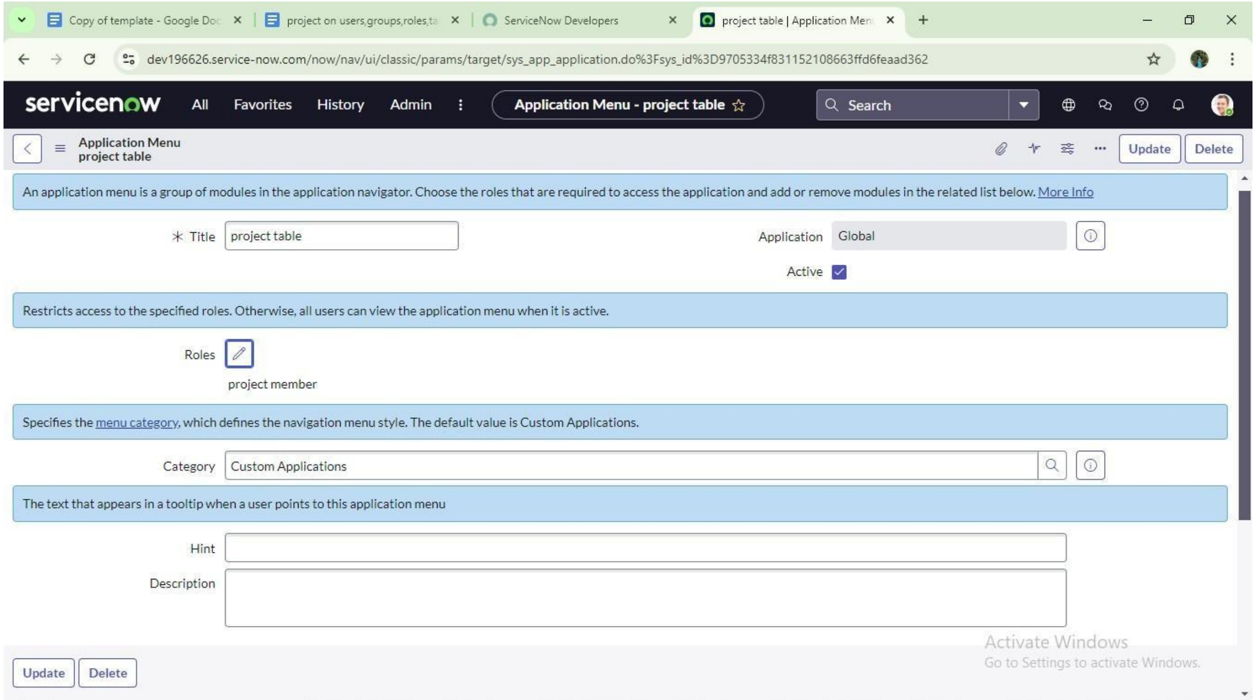
1. Open servicenow.Click on All >> search for user
2. Select tables under system definition
3. Select the bob p user
4. Under team member
5. Click on edit
6. Select team member and give table role and save
7. Click on profile icon Impersonate user to bob
8. We can see the task table2.

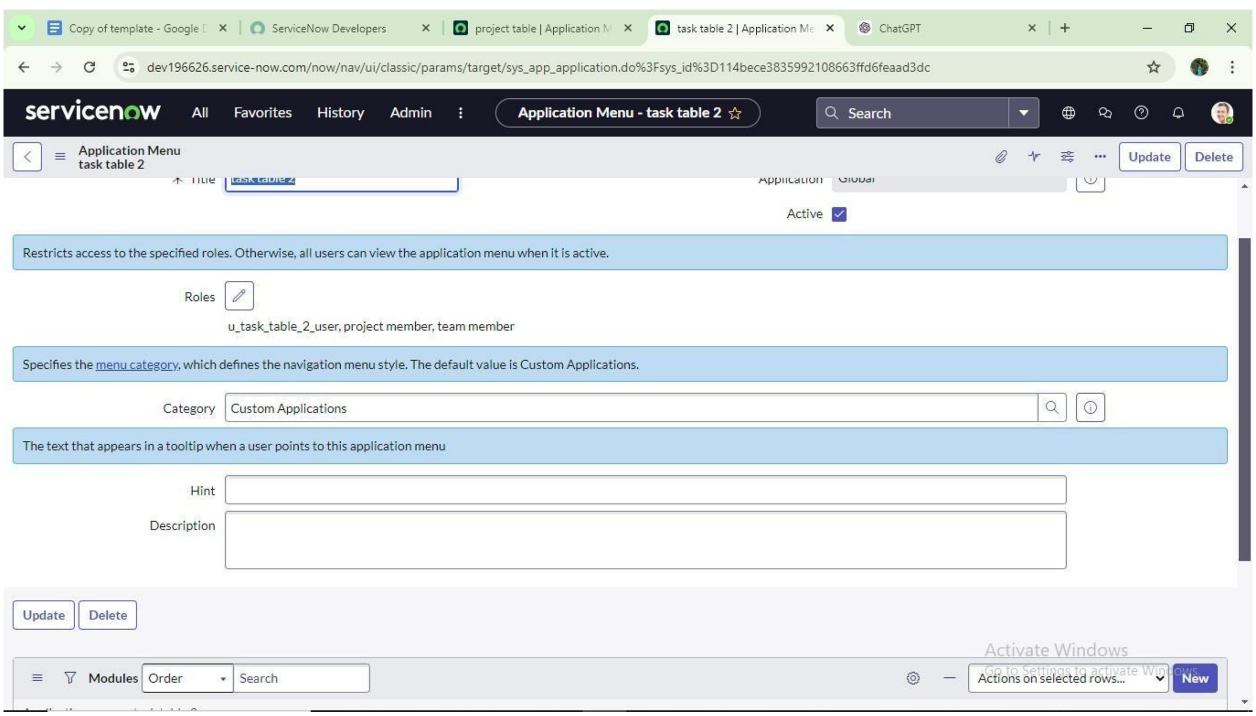


Milestone 7 : Application access

Activity 1: Assign table access to application

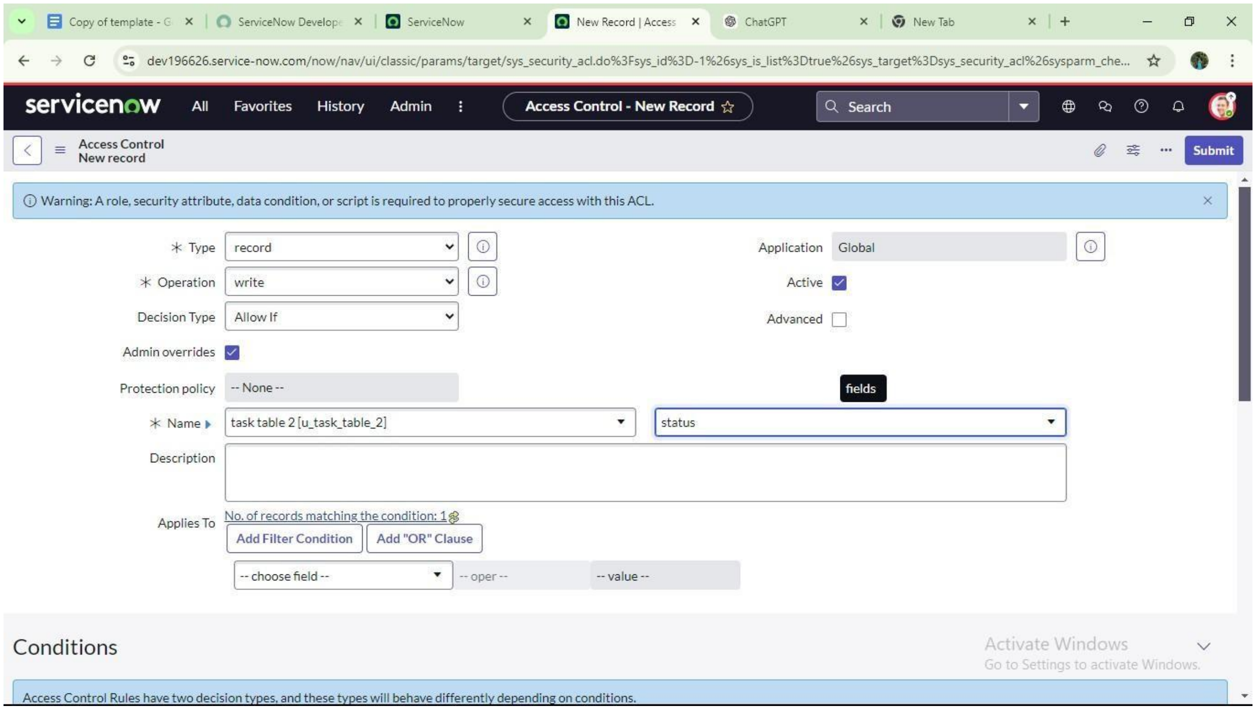
1. while creating a table it automatically create a application and module for that table
2. Go to application navigator search for search project table application
3. Click on edit module
4. Give project member roles to that application
5. Search for task table2 and click on edit application.
6. Give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



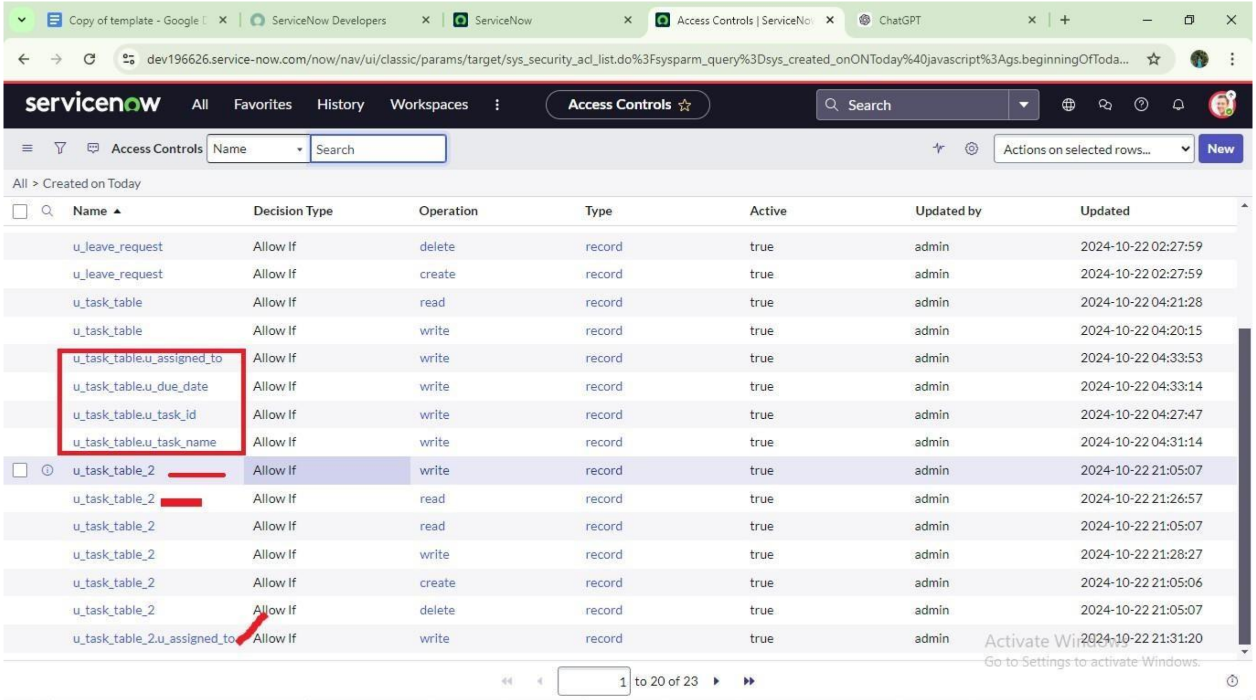


Milestone 8 :Access control list Activity 1: Create ACL

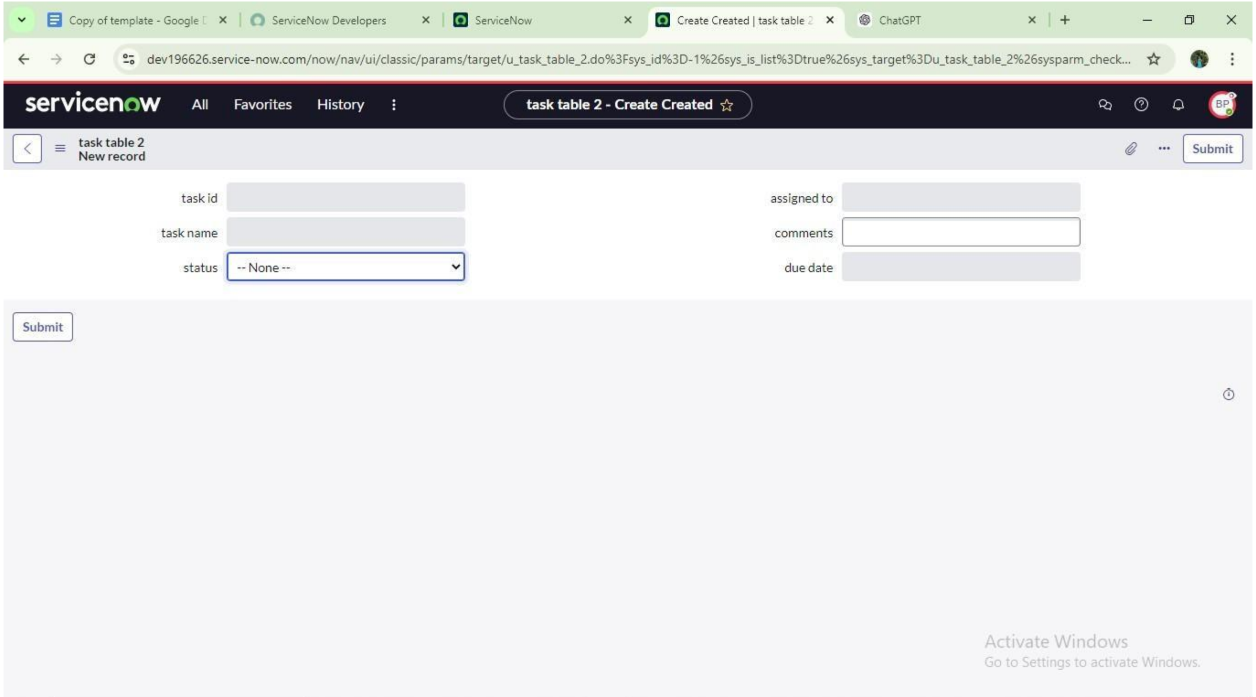
1. Open service now.
2. Click on All >> search for ACL
3. Select Access Control(ACL) under system security
4. Click on elevate role 5. Click on new



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



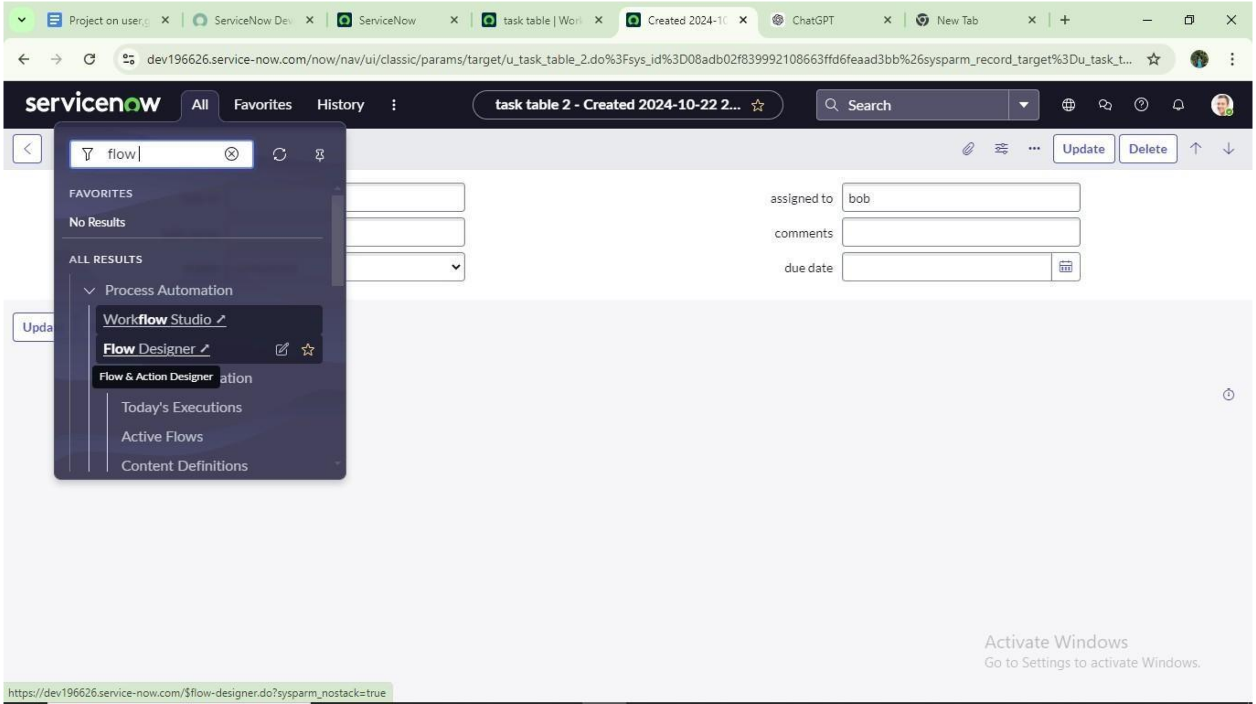
12.Click on profile on top right side
13.Click on impersonate user
14.Select bob user
15.Go to all and select task table2 in the application menu bar
16. Comment and status fields are have the edit access

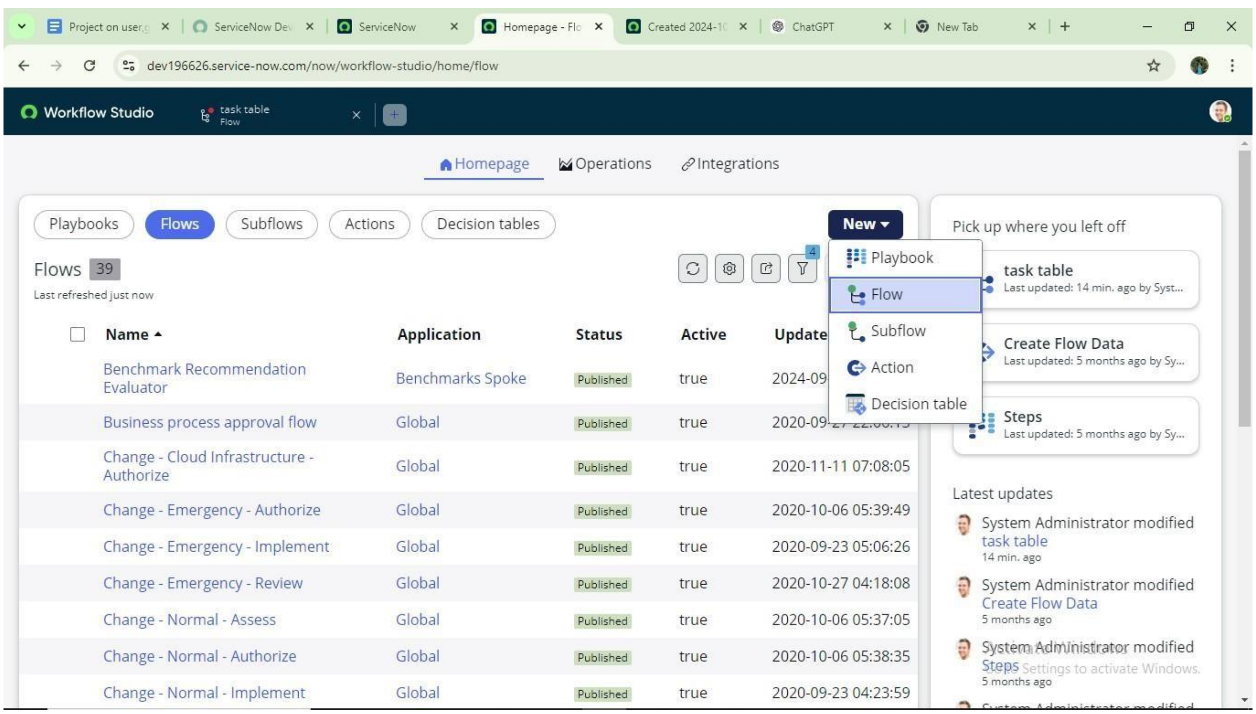


Milestone 9: Flow

Activity 1: 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.


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
https://dev196626.service-now.com/$flow-designer.do?sysparm_nostack=true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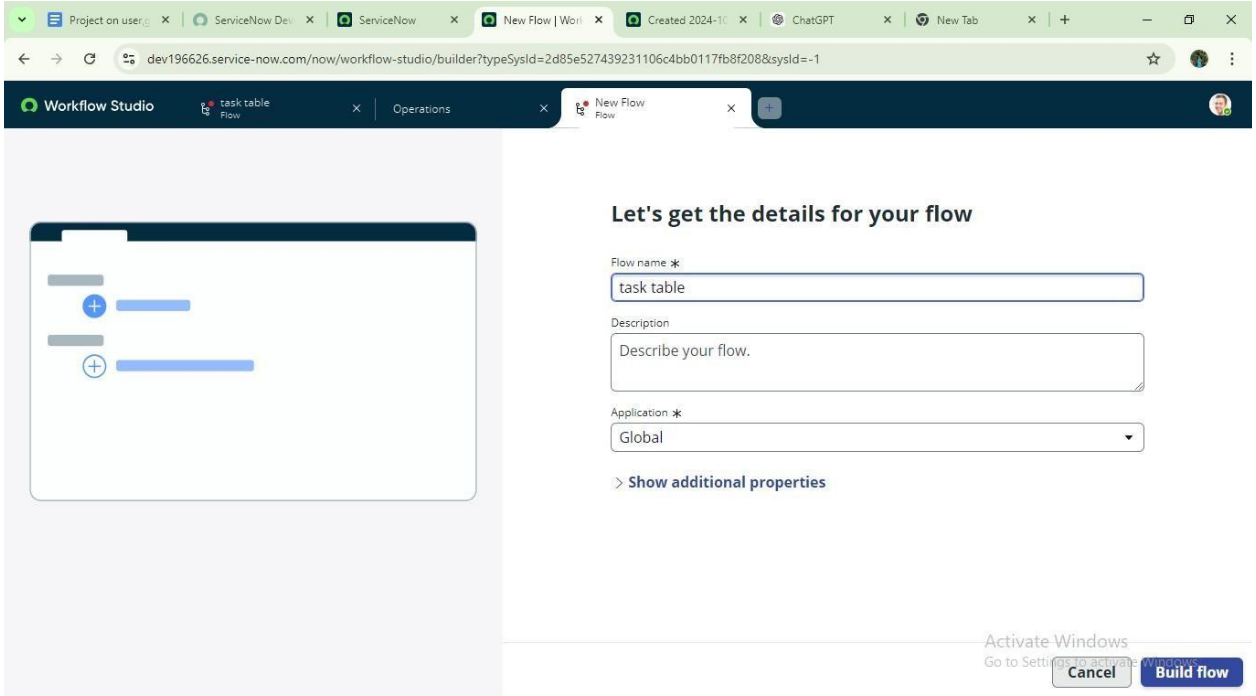
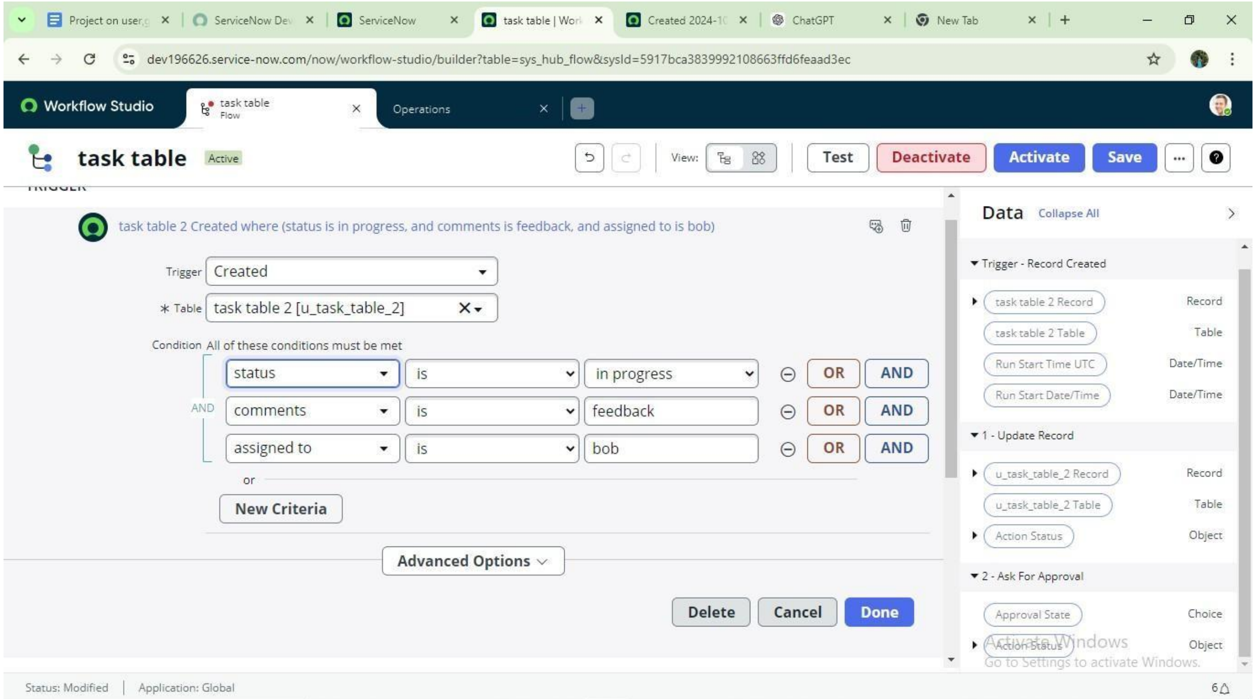
Workflow Studio
task table
Flow
Homepage
Operations
Integrations
Playbooks
Flows
Subflows
Actions
Decision tables
New
Playbook
Flow
Subflow
Action
Decision table
Flows 39
Last refreshed just now
Name
Application
Status
Active
Benchmark Recommendation Evaluator
Benchmarks Spoke
Published
true
Business 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



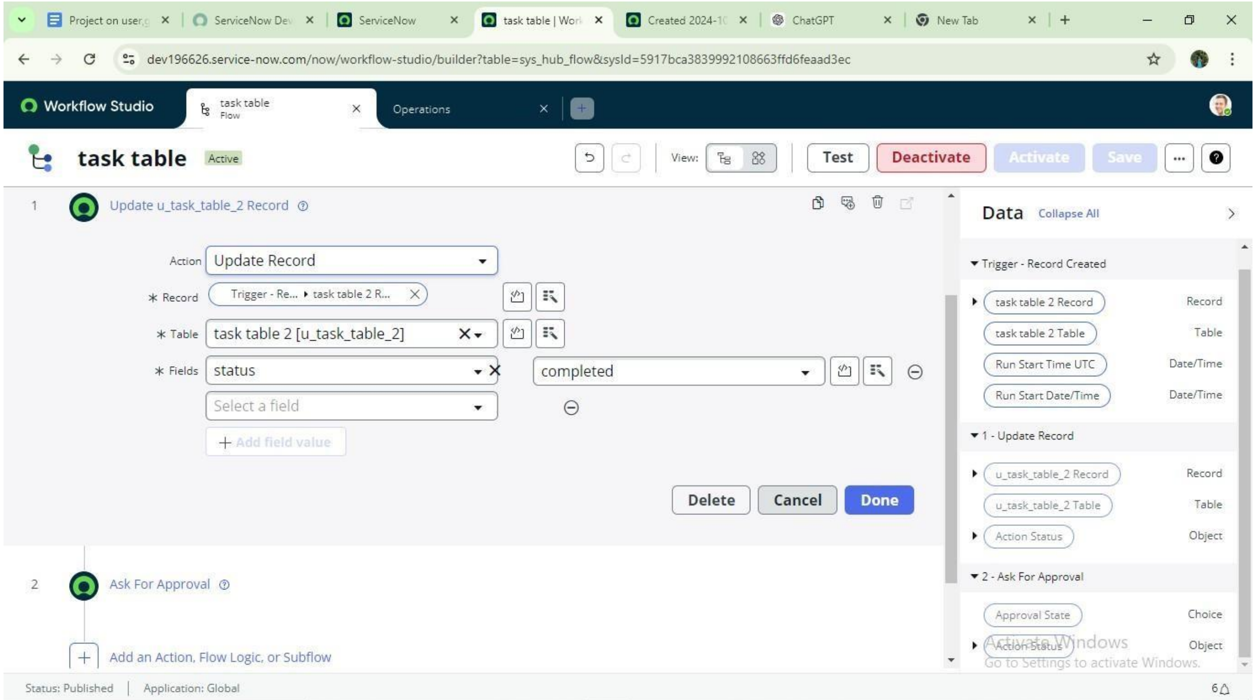
next step:

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:

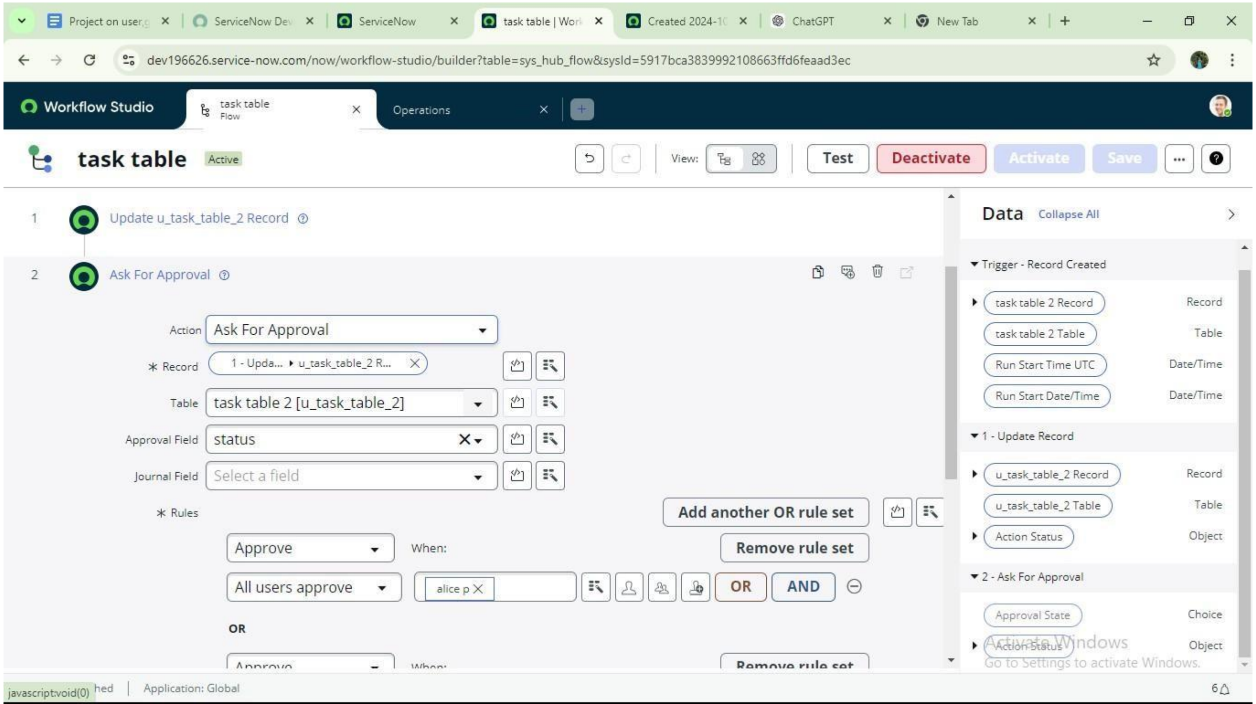
1. Click on Add an action.
2. Select action in that ,search for " update records".
3. In Record field drag the fields from the data navigation from Right Side(Data pill)
4. Table will be auto assigned after that
5. Add fields as "status" and value as "completed"
6. Click on Done.



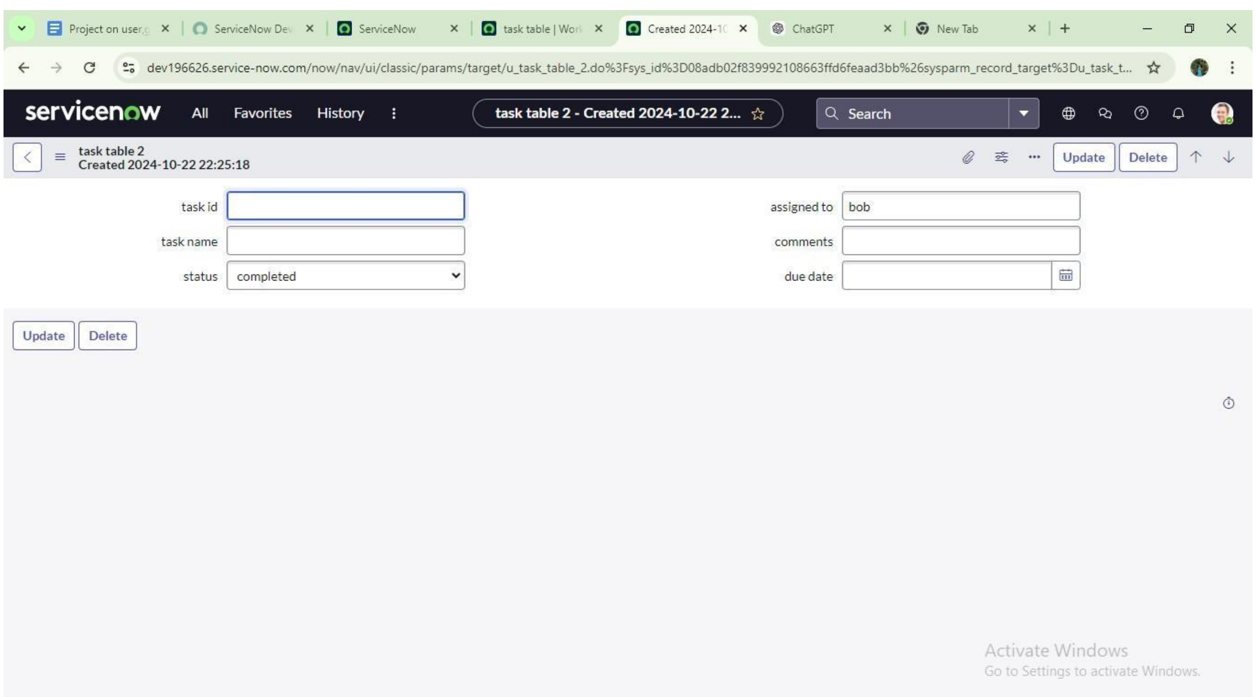
Next step:

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

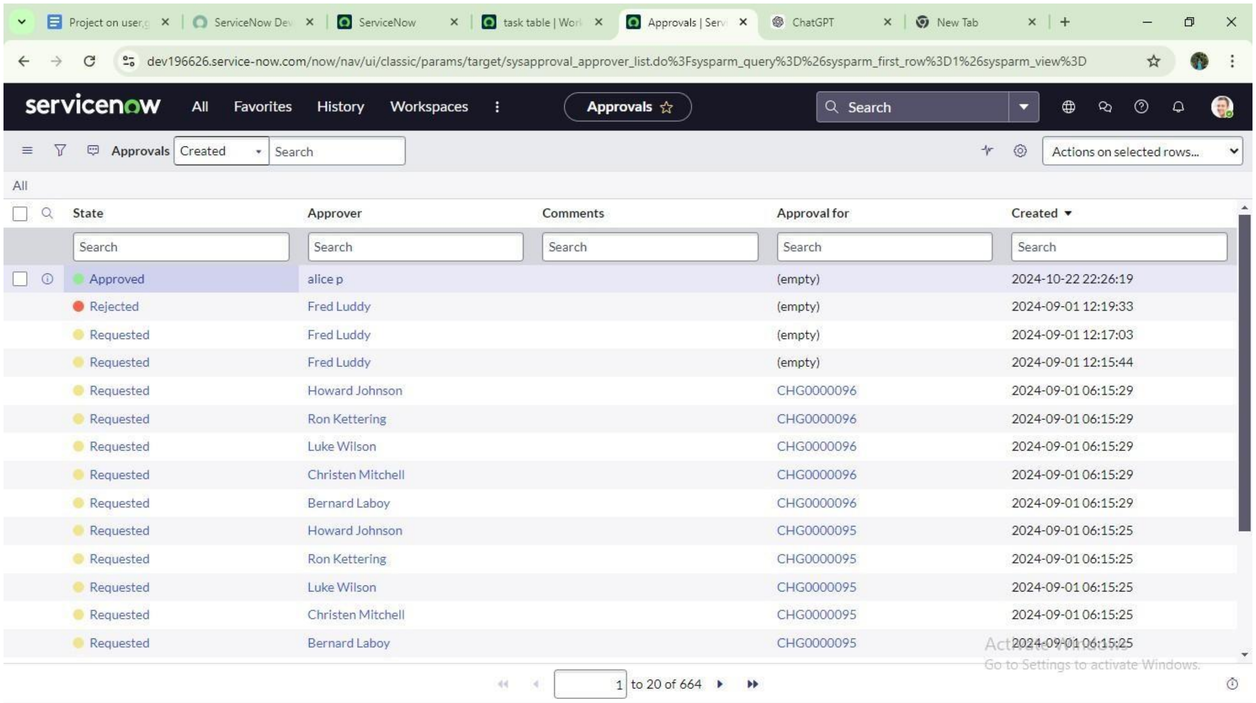
8. Click on Done.



9.Go to application navigator search for task table.
10.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 illustrates a structured approach to project management, clearly defining the roles of Alice (Project Manager) and Bob (Team Member) within an organized workflow. With Alice providing oversight and direction, and Bob handling task execution, the team collaborates effectively to drive project success. The integration of tables to organize key information—such as project details, task assignments, and progress updates—enhances transparency and simplifies tracking. Overall, this system strengthens accountability, improves communication, and supports the efficient and successful completion of projects.