

Project Report

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

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Team Size: 4

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Table of Contents

1. Step 1: Problem Statement
2. Step 2: Create Users
3. Step 3: Create Groups
4. Step 4: Create Roles
5. Step 5: Create Tables
6. Step 6: Assign Users to Project Team Group
7. Step 7: Assign Roles to Alice
8. Step 8: Assign Roles to Bob
9. Step 9: Assign Table Access to Application
10. Step 10: Create ACL (Access Control List)
11. Step 11: Create a Flow to Assign Operations Ticket
12. Conclusion

Step 1: Problem Statement

In a small project management 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 to confusion regarding task assignments and progress tracking.

Step 2: Create Users

1. Open ServiceNow.
2. Click on 'All' and search for 'Users'.
3. Select 'Users' under System Security.
4. Click on 'New'.
5. Fill in the details to create a new user and click 'Submit'.
6. Create another user with the required details and click 'Submit'.

Step 3: Create Groups

1. Open ServiceNow.
2. Click on 'All' and search for 'Groups'.
3. Select 'Groups' under System Security.
4. Click on 'New'.
5. Fill in the required details to create a new group and click 'Submit'.

Step 4: Create Roles

1. Open ServiceNow.
2. Click on 'All' and search for 'Roles'.
3. Select 'Roles' under System Security.
4. Click on 'New'.
5. Fill in the required details to create a new role and click 'Submit'.
6. Create another role for the Team Member and click 'Submit'.

Step 5: Create Tables

1. Open ServiceNow.
2. Click on 'All' and search for 'Tables'.
3. Select 'Tables' under System Definition.
4. Click on 'New'.
5. Create a table with Label: 'Project Table', enable 'Create Module' & 'Create Mobile Module', and define necessary columns.

6. Click on 'Submit'.
7. Create another table with Label: 'Task Table 2' and submit.

Step 6: Assign Users to Project Team Group

1. Open ServiceNow.
2. Search for 'Groups'.
3. Select the 'Project Team' group.
4. Under Group Members, click 'Edit'.
5. Add Alice and Bob to the group and save.

Step 7: Assign Roles to Alice

1. Open ServiceNow and search for 'Users'.
2. Select the Project Manager user (Alice).
3. Under roles, click 'Edit'.
4. Assign the 'Project Member', 'u_project_table', and 'u_task_table' roles to Alice.
5. Save and update the form.

Step 8: Assign Roles to Bob

1. Open ServiceNow and search for 'Users'.
2. Select the Team Member user (Bob).
3. Assign the 'Team Member' role and relevant table roles.
4. Save and impersonate Bob to verify access to Task Table 2.

Step 9: Assign Table Access to Application

1. Navigate to the Project Table application.
2. Edit the module and assign the 'Project Member' role.
3. Similarly, edit the Task Table 2 application and assign both 'Project Member' and 'Team Member' roles.

Step 10: Create ACL (Access Control List)

1. Open ServiceNow and search for 'ACL'.
2. Select 'Access Control' under System Security.
3. Click on 'Elevate Role', then 'New'.
4. Create an ACL with the required roles and table permissions.
5. Repeat to create four ACLs as needed.
6. Impersonate Bob to test edit access for 'Comment' and 'Status' fields in Task Table 2.

Step 11: Create a Flow to Assign Operations Ticket

1. Open Flow Designer under Process Automation.
2. Create a new flow named 'Task Table' under the Global application.
3. Add a trigger for 'Create Record' with conditions:
 - Status is 'In Progress'
 - Comments are 'Feedback'
 - Assigned to is Bob
4. Add an action to update the record:
 - Set Status to 'Completed'
5. Add another action for approval:
 - Approver is Alice
 - Approval field is Status
6. Verify the flow by updating the Task Table and checking approvals in 'My Approvals'.

Conclusion

This project demonstrates a structured approach to project management within ServiceNow, emphasizing role-based access, clear workflows, and streamlined task management. With Alice overseeing project tasks and Bob executing them, the team maintains accountability and smooth collaboration. The use of custom tables and flows enhances tracking and improves overall productivity.