

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

TEAM ID: NM2025TMID00175

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.

Project Flow:

Milestone 1: Create Users.

Milestone 2: Create Groups.

Milestone 3: Create Roles.

Milestone 4: Assign Users to groups.

Milestone 5: Application Access.

Milestone 6: Access Control List.

Milestone 7: Create a Flow to Assign Operation tickets to Groups.

Milestone 8: Conclusion.

Milestone 1 : Create Users:

->Open service now

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

5. Click on submit

The screenshot shows the ServiceNow 'User - New Record' form. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Admin', and a 'User - New Record' button. A search bar and a 'Submit' button are also present. A blue banner at the top of the form area states: 'To set up the User's password, save the record and then click Set Password.' The form is divided into two columns. The left column contains fields for 'User ID' (alice), 'First name' (alice), 'Last name' (p), 'Title' (empty), and 'Department' (empty). Below these are checkboxes for 'Password needs reset' (unchecked), 'Locked out' (unchecked), 'Active' (checked), and 'Internal Integration User' (unchecked). The right column contains fields for '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), and a 'Photo' link labeled 'Click to add...'. A 'Submit' button is located at the bottom right of the form.

Create one more user:

1. Create another user with the following details
2. Click on submit

The screenshot shows the ServiceNow 'User - New Record' form, identical in layout to the previous one, but with fields filled for user 'bob'. The 'User ID' is 'bob', 'First name' is 'bob', 'Last name' is 'p', 'Title' is empty, and 'Department' is empty. The 'Active' checkbox is checked. The 'Email' is 'bob@gmail.com', 'Identity type' is 'Human', 'Language' is '-- None --', 'Calendar integration' is 'Outlook', 'Time zone' is 'System (America/Los Angeles)', 'Date format' is 'System (yyyy-MM-dd)', 'Business phone' is empty, 'Mobile phone' is empty, and the 'Photo' link is 'Click to add...'. A 'Submit' button is at the bottom right.

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

The screenshot shows the ServiceNow interface for creating a new group. The left sidebar contains a navigation menu with categories like System Mailboxes, Administration, System Security, Users and Groups, Reports, and User Administration. The main content area is titled 'Group - New Record' and contains the following fields:

- Name: project team
- Group email: (empty)
- Manager: (empty)
- Parent: (empty)
- Description: (empty)

A 'Submit' button is located at the bottom left of the form area.

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

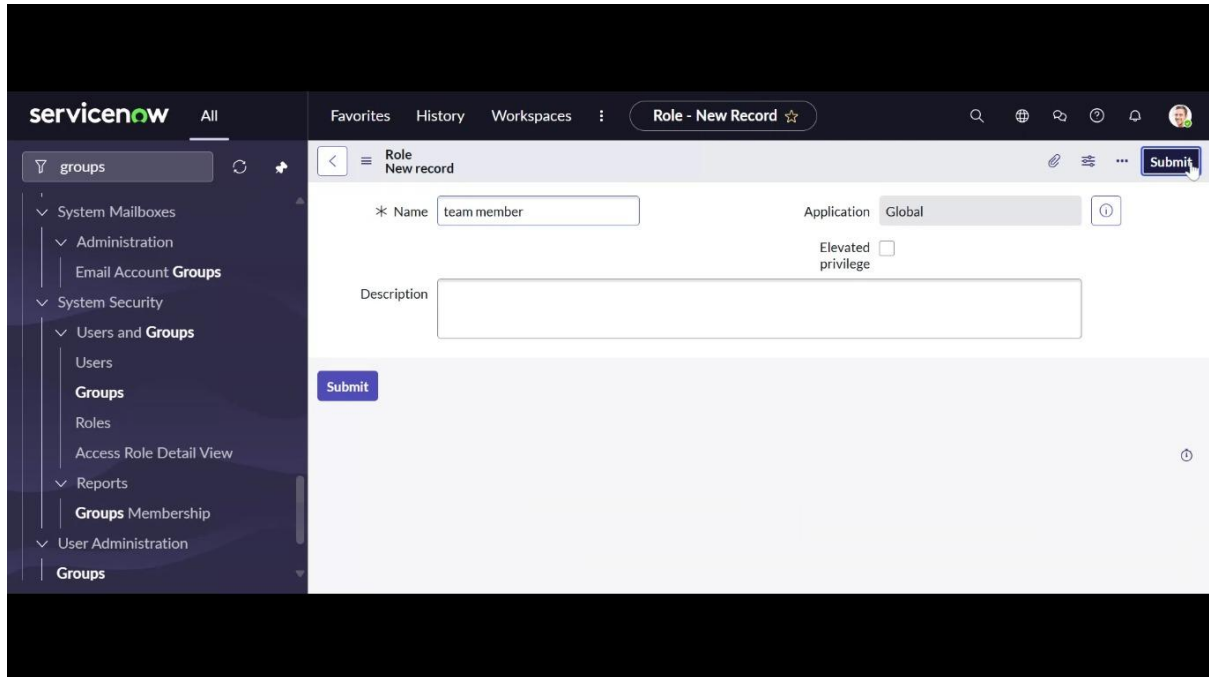
The screenshot shows the ServiceNow interface for creating a new role. The left sidebar contains a navigation menu with categories like System Mailboxes, Administration, System Security, Users and Groups, Reports, and User Administration. The main content area is titled 'Role - New Record' and contains the following fields:

- Name: project member
- Application: Global
- Elevated privilege: ☐
- Description: (empty)

A 'Submit' button is located at the bottom left of the form area.

Create one more role:

1. Create another role with the following details
2. Click on submit

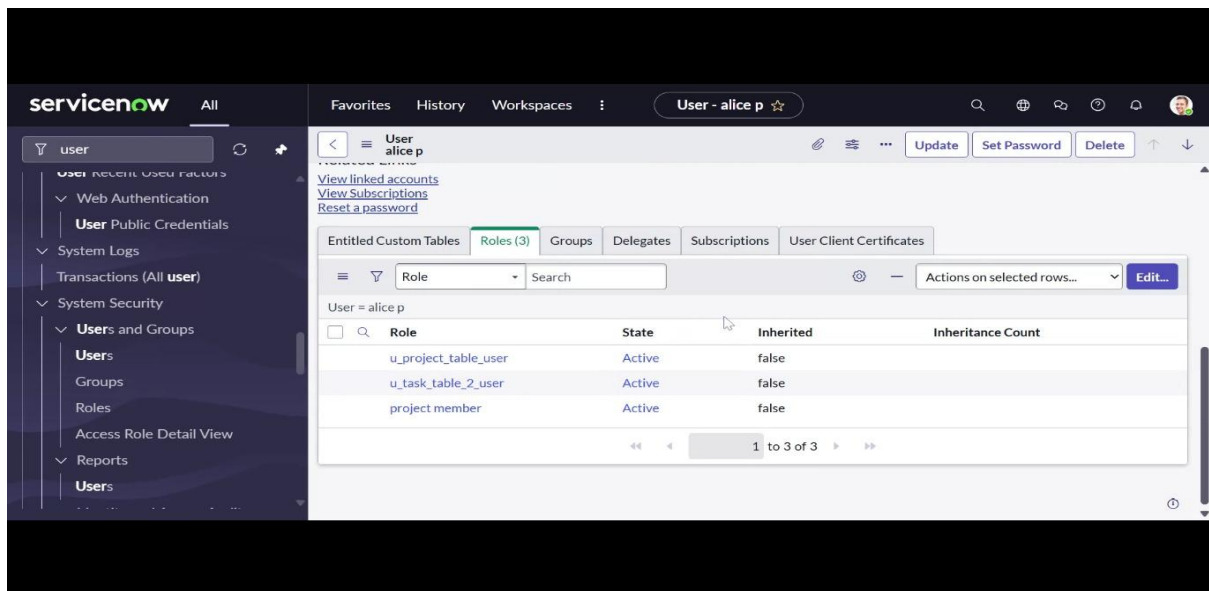


The screenshot shows the ServiceNow 'Role - New Record' form. The left sidebar contains a navigation menu with categories like 'groups', 'System Mailboxes', 'Administration', 'System Security', 'Users and Groups', 'Reports', and 'User Administration'. The main form area has a title bar 'Role - New Record' with a star icon. Below the title bar, there are fields for 'Name' (containing 'team member'), 'Application' (set to 'Global'), and 'Elevated privilege' (unchecked). A 'Description' field is also present. A 'Submit' button is located at the bottom left of the form area. The top right of the interface shows a user profile icon and a 'Submit' button.

Milestone 4 : Assign users to groups:

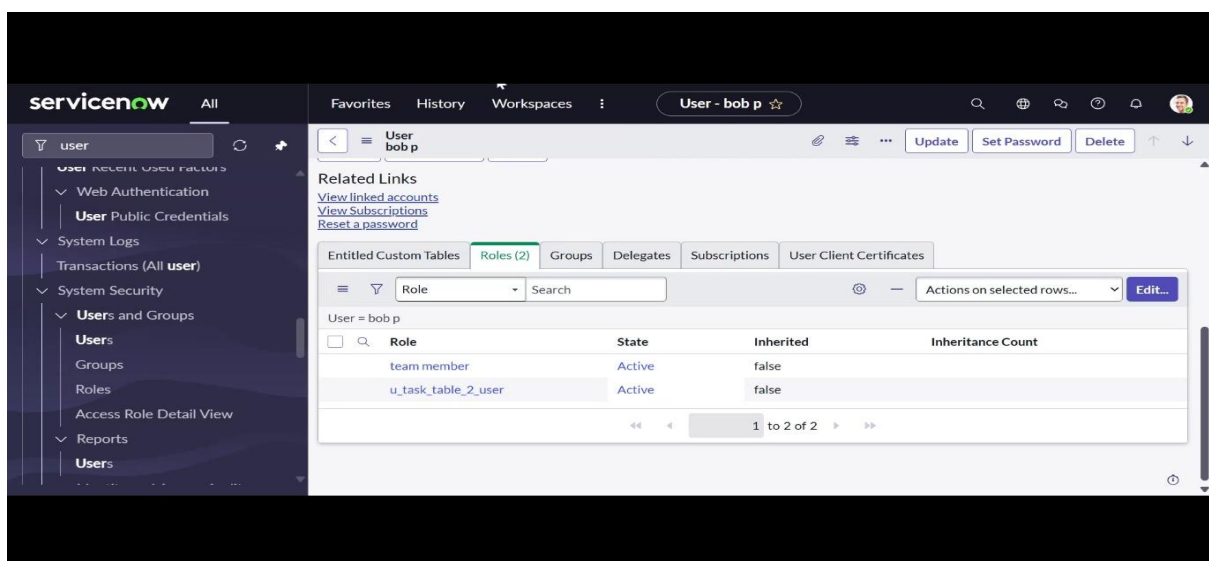
i) Assign roles to Alice user

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.



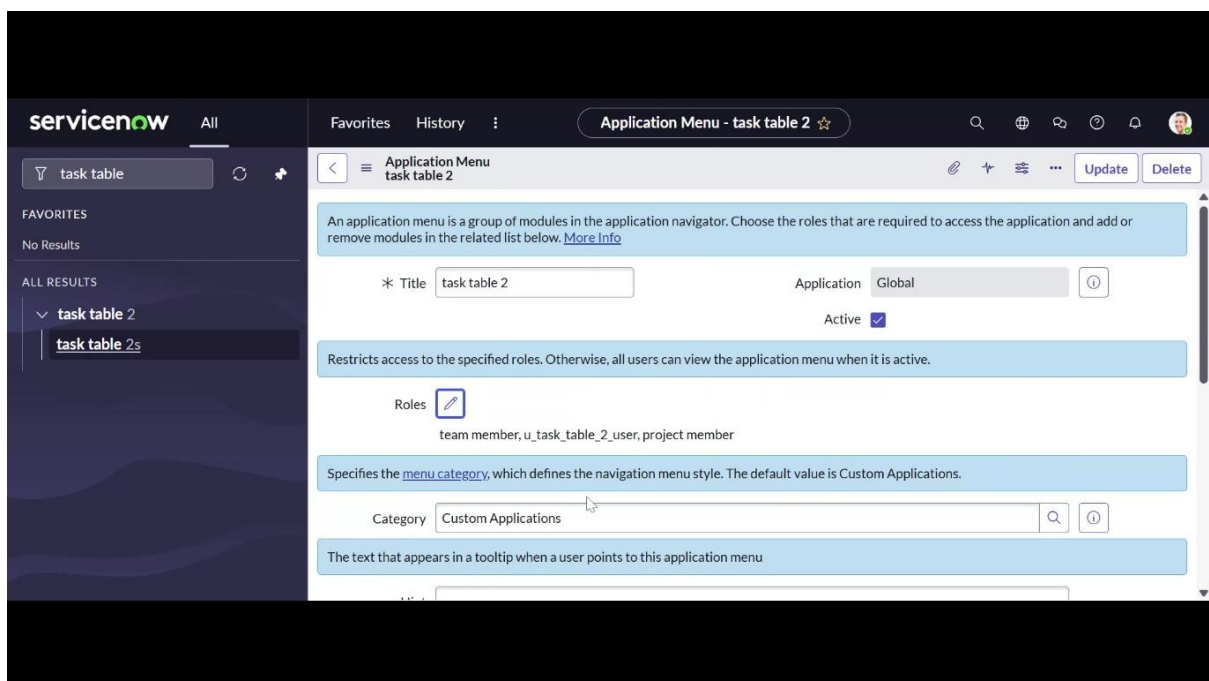
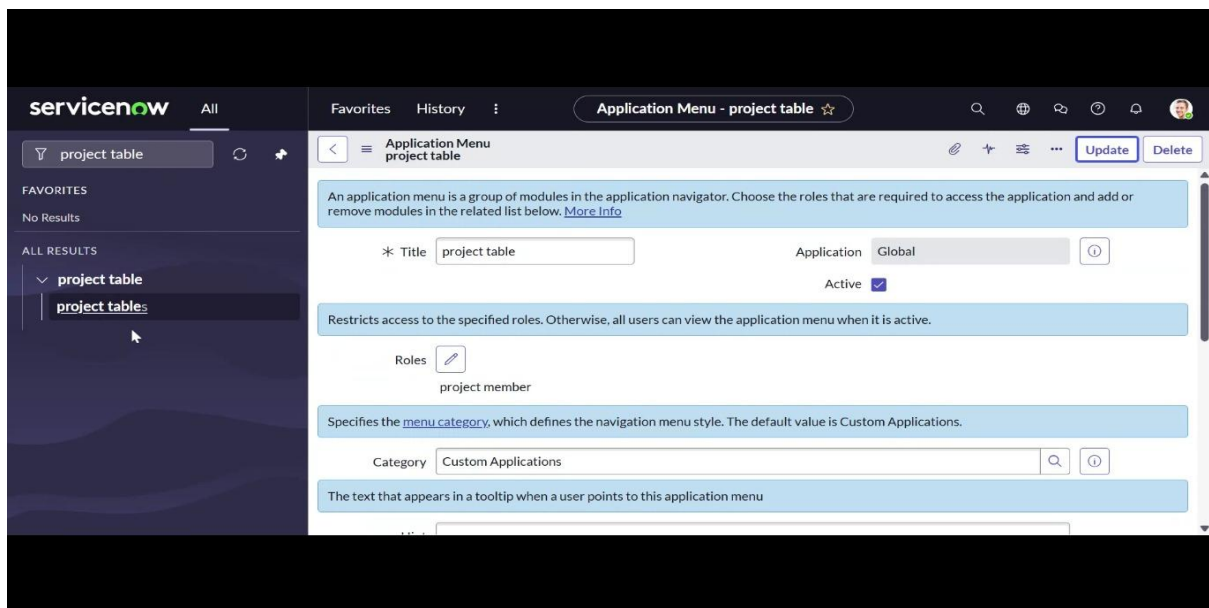
Assign roles to bob user

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 5 : 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 6 : Access Control List.

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

The screenshot shows the 'Access Control - New Record' form in ServiceNow. The form includes a warning message: 'Warning: A role, security attribute, data condition, or script is required to properly secure access with this ACL.' The form fields are as follows:

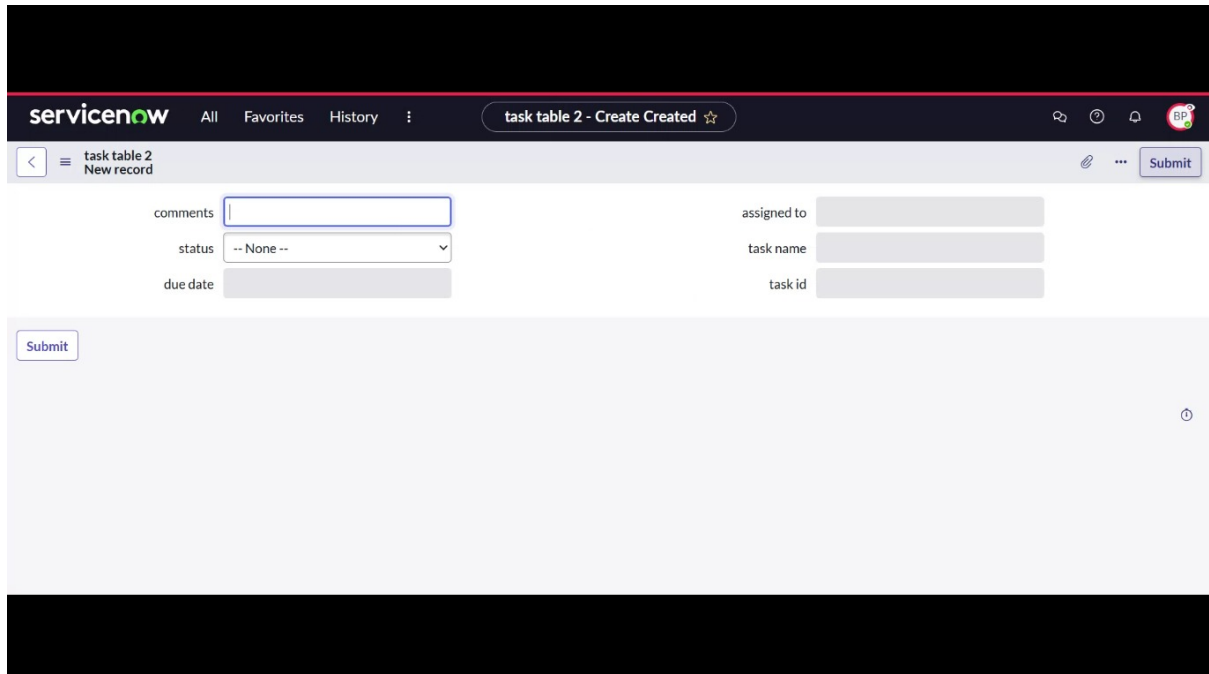
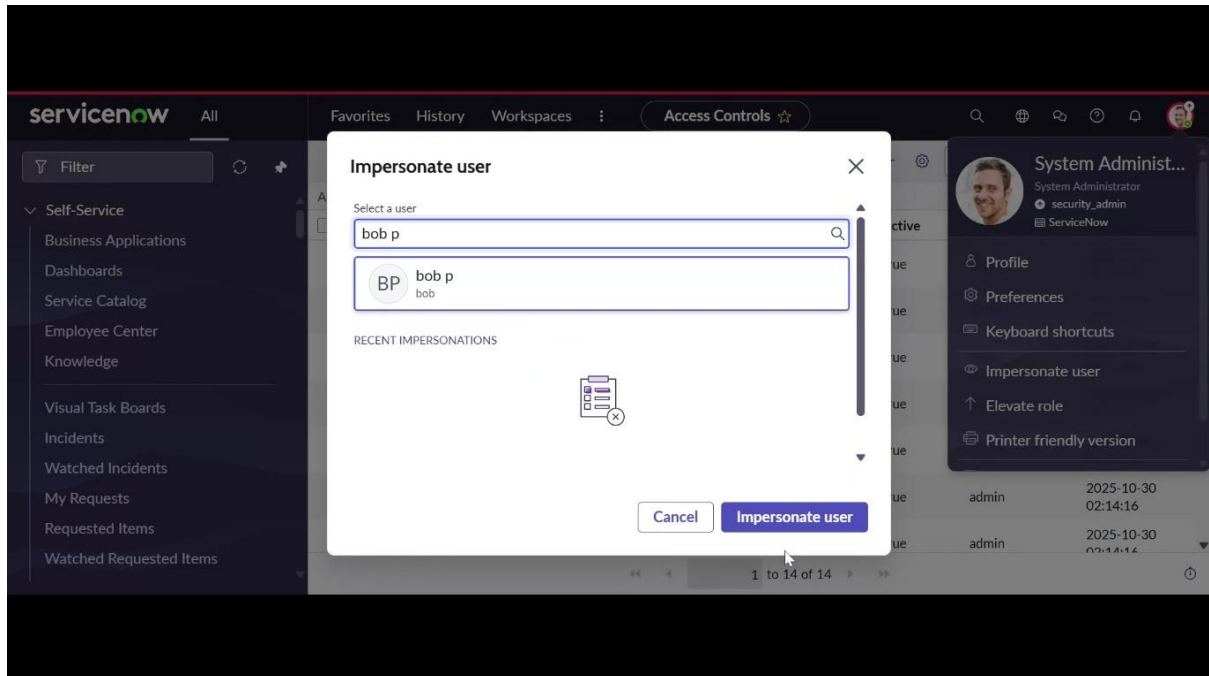
- * Type: record
- * Operation: create
- Decision Type: Allow If
- Admin overrides: ☒
- Protection policy: -- None --
- * Name: task table 2 [u_task_table_2]
- Description: (empty text area)
- Applies To: No. of records matching the condition: 0
- Application: Global
- Active: ☒
- Advanced: ☐
- Fields: status

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

The screenshot shows the 'Access Controls' list view in ServiceNow. The table displays the following data:

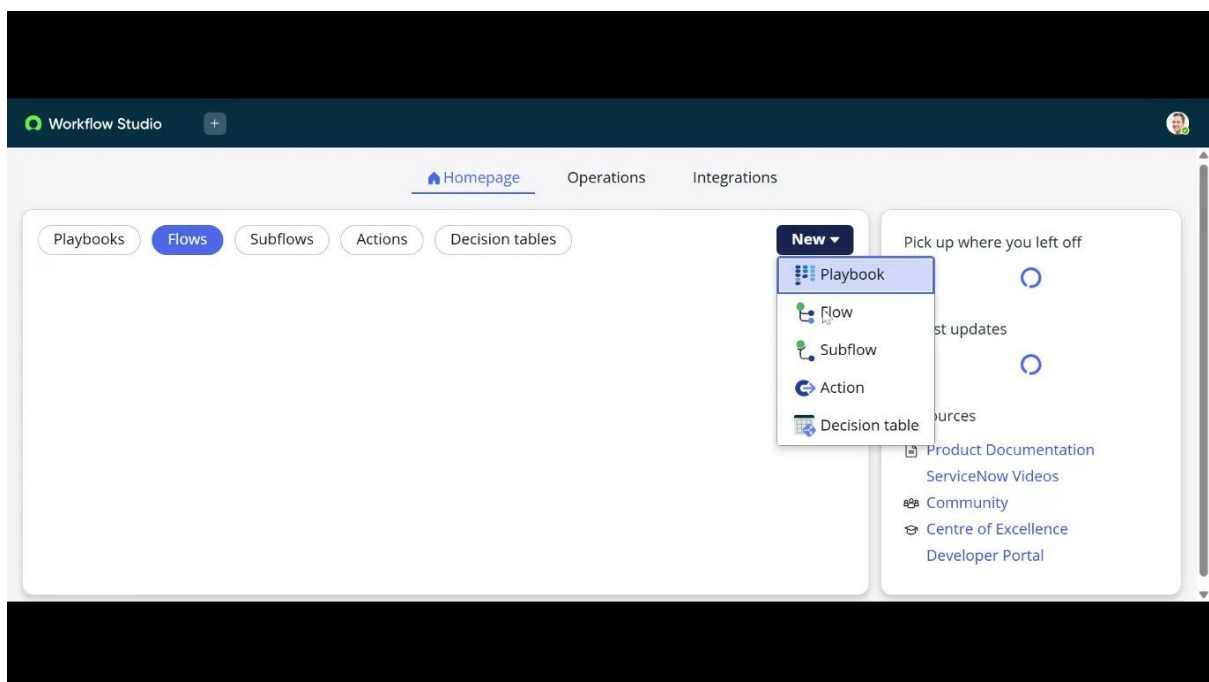
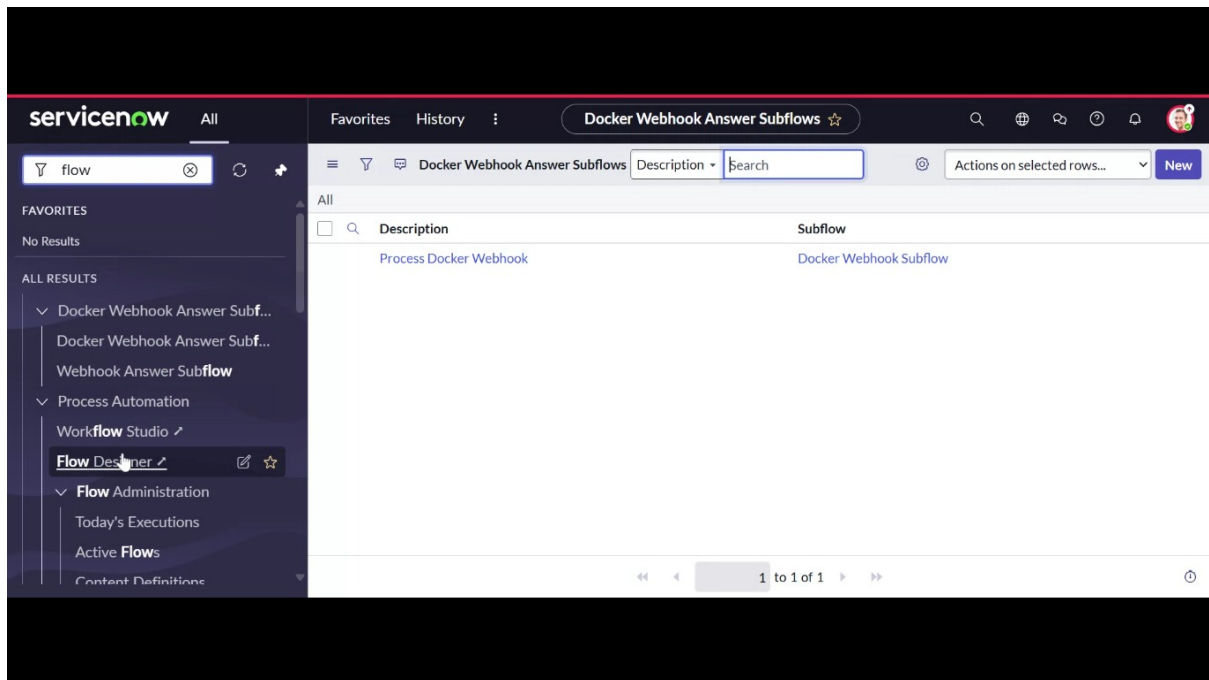
Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_task_table_2	ALLOW IF	WRITE	record	true	admin	02:14:16
u_task_table_2.u_assigned_to	Allow If	create	record	true	admin	2025-10-30 02:51:55
u_task_table_2.u_comments	Allow If	create	record	true	admin	2025-10-30 02:57:20
u_task_table_2.u_due_date	Allow If	create	record	true	admin	2025-10-30 02:53:26
u_task_table_2.u_status	Allow If	create	record	true	admin	2025-10-30 02:50:32
u_task_table_2.u_task_id	Allow If	create	record	true	admin	2025-10-30 02:54:46
u_task_table_2.u_task_name	Allow If	create	record	true	admin	2025-10-30 02:56:10

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



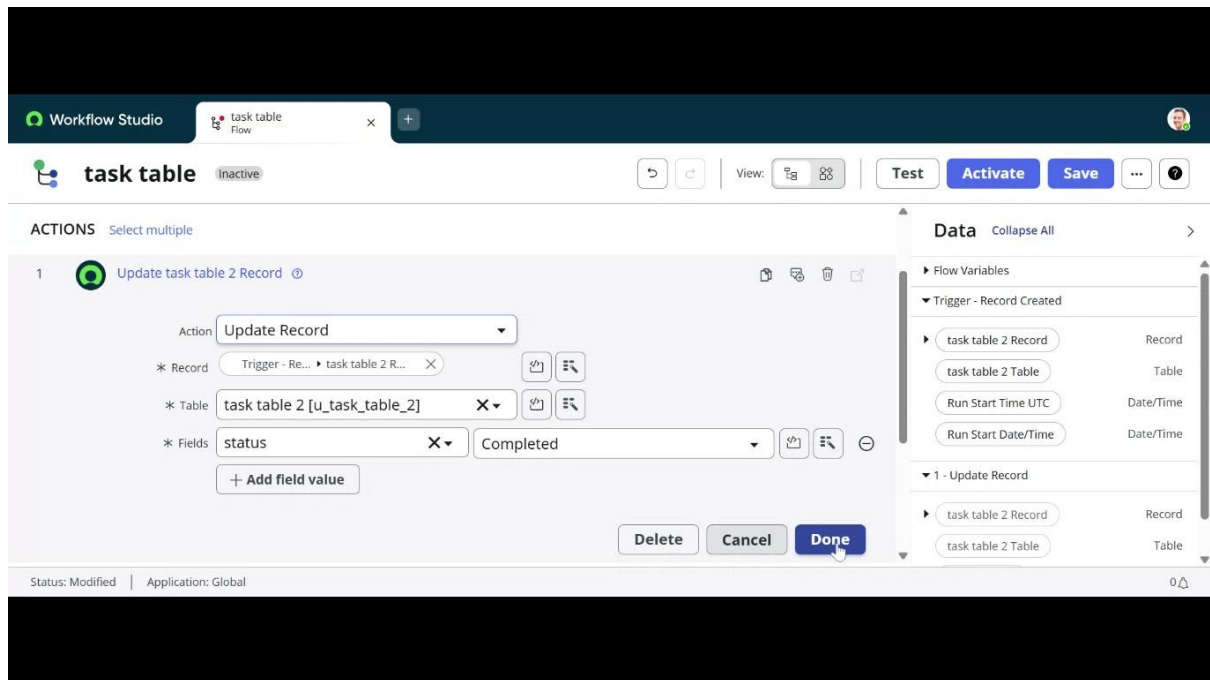
Milestone 7 : Create a Flow to Assign operations ticket to group

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.



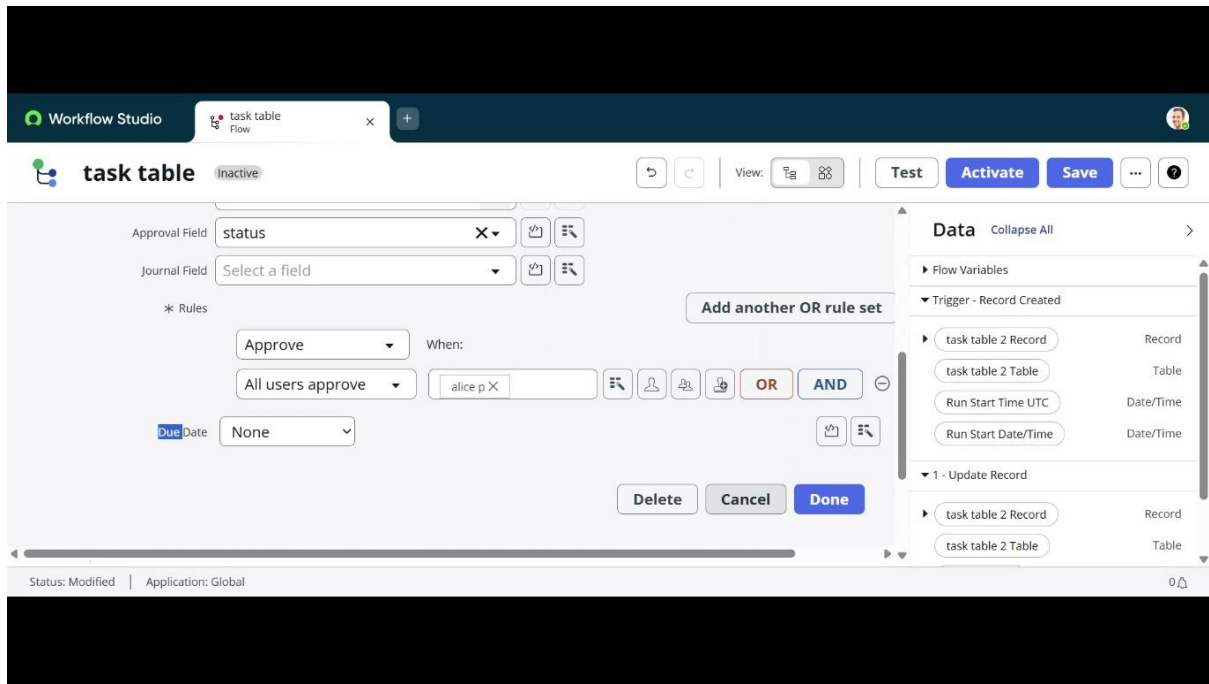
Next step:

1. Click on Add 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.

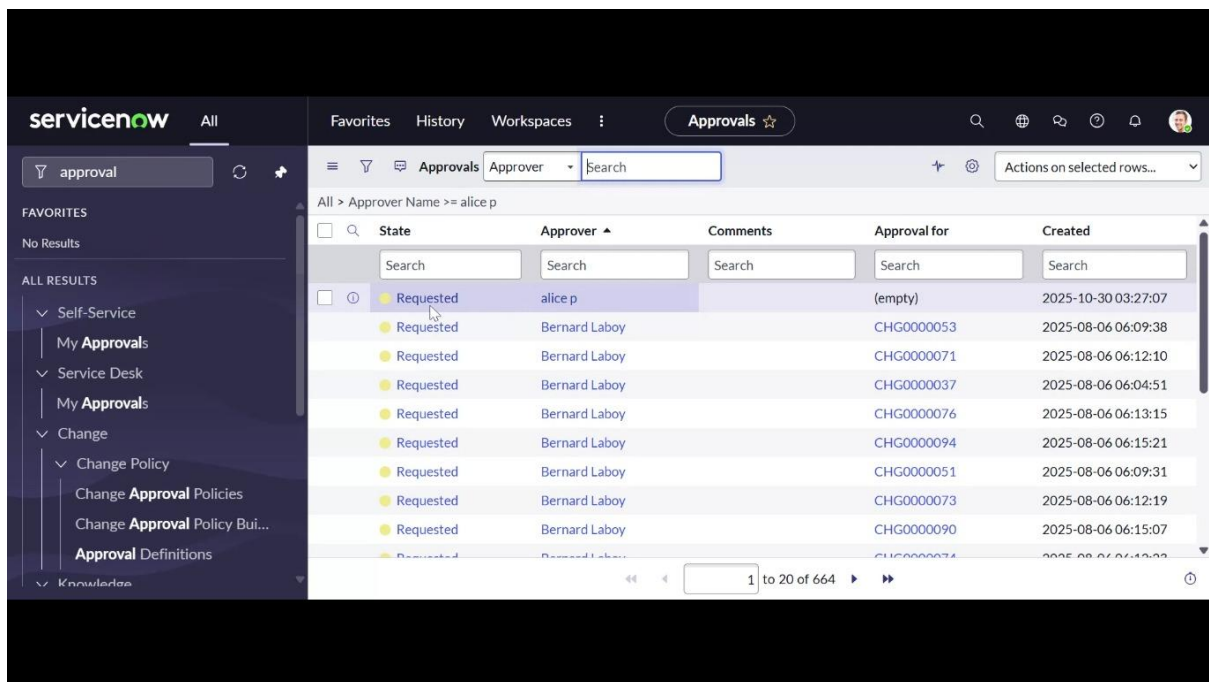


Next step:

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.



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



The screenshot displays the ServiceNow 'Approvals' workspace. The left sidebar contains navigation links for 'Self-Service', 'My Approvals', 'Service Desk', 'My Approvals', 'Change', 'Change Policy', 'Change Approval Policies', 'Change Approval Policy Bui...', 'Approval Definitions', and 'Knowledge'. The main content area shows a table of approval tasks with columns for State, Approver, Comments, Approval for, and Created. The table is filtered by 'Approved task table 2: Created 2025-10-30 03:27:05' and 'All > Approver Name >= alice p'. The table contains 20 rows, with the first row being 'Approved' and the rest being 'Requested'.

State	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2025-10-30 03:27:07
Requested	Bernard Laboy		CHG0000053	2025-08-06 06:09:38
Requested	Bernard Laboy		CHG0000071	2025-08-06 06:12:10
Requested	Bernard Laboy		CHG0000037	2025-08-06 06:04:51
Requested	Bernard Laboy		CHG0000076	2025-08-06 06:13:15
Requested	Bernard Laboy		CHG0000094	2025-08-06 06:15:21
Requested	Bernard Laboy		CHG0000051	2025-08-06 06:09:31
Requested	Bernard Laboy		CHG0000073	2025-08-06 06:12:19

Milestone 8: 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.