

# **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 interface. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Admin', and a search bar. The main form is titled 'User - New Record'. A note at the top says, 'To set up the User's password, save the record and then click Set Password.' The form fields include:

User ID	alice	Email	alice@gmail.com
First name	alice	Identity type	Human
Last name	p	Language	-- None --
Title		Calendar integration	Outlook
Department		Time zone	System (America/Los_Angeles)
Password needs reset	<input type="checkbox"/>	Date format	System (yyyy-MM-dd)
Locked out	<input type="checkbox"/>	Business phone	
Active	<input checked="" type="checkbox"/>	Mobile phone	
Internal Integration User	<input type="checkbox"/>	Photo	Click to add...

## Create one more user:

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

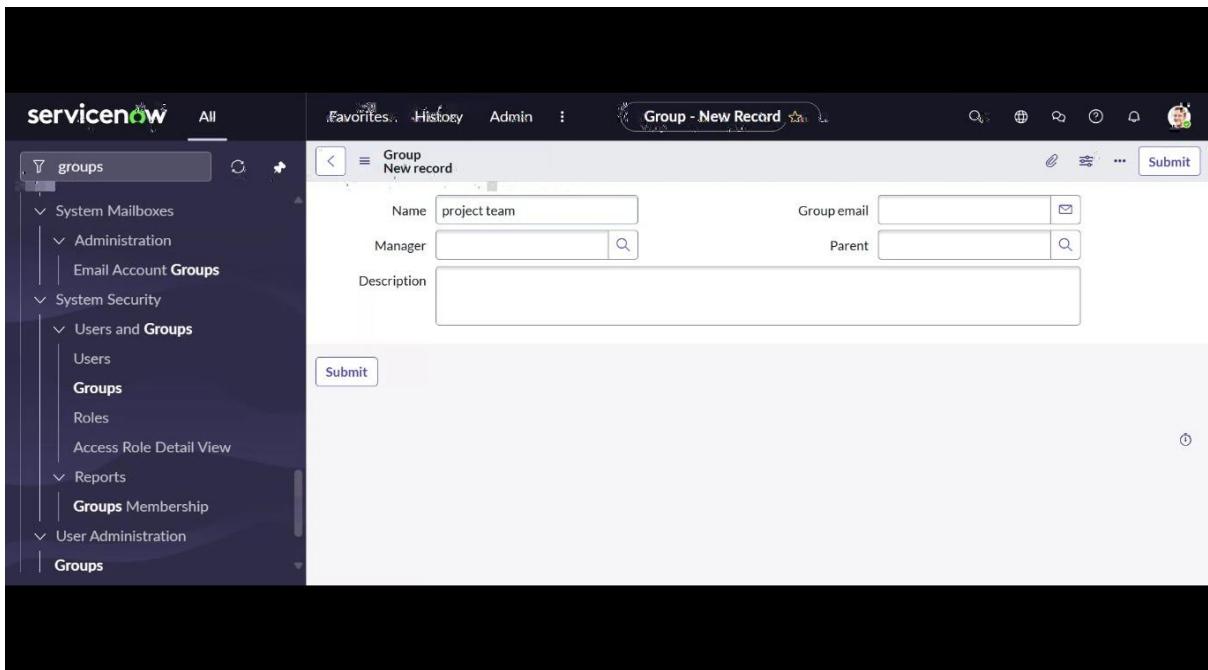
The screenshot shows the ServiceNow User - New Record interface, similar to the previous one but for user 'bob'. The form fields are identical, except for the User ID which is 'bob'.

User ID	bob	Email	bob@gmail.com
First name	bob	Identity type	Human
Last name	p	Language	-- None --
Title		Calendar integration	Outlook
Department		Time zone	System (America/Los_Angeles)
Password needs reset	<input type="checkbox"/>	Date format	System (yyyy-MM-dd)
Locked out	<input type="checkbox"/>	Business phone	
Active	<input checked="" type="checkbox"/>	Mobile phone	
Internal Integration User	<input type="checkbox"/>	Photo	Click to add...

## Milestone 2 : Create Groups

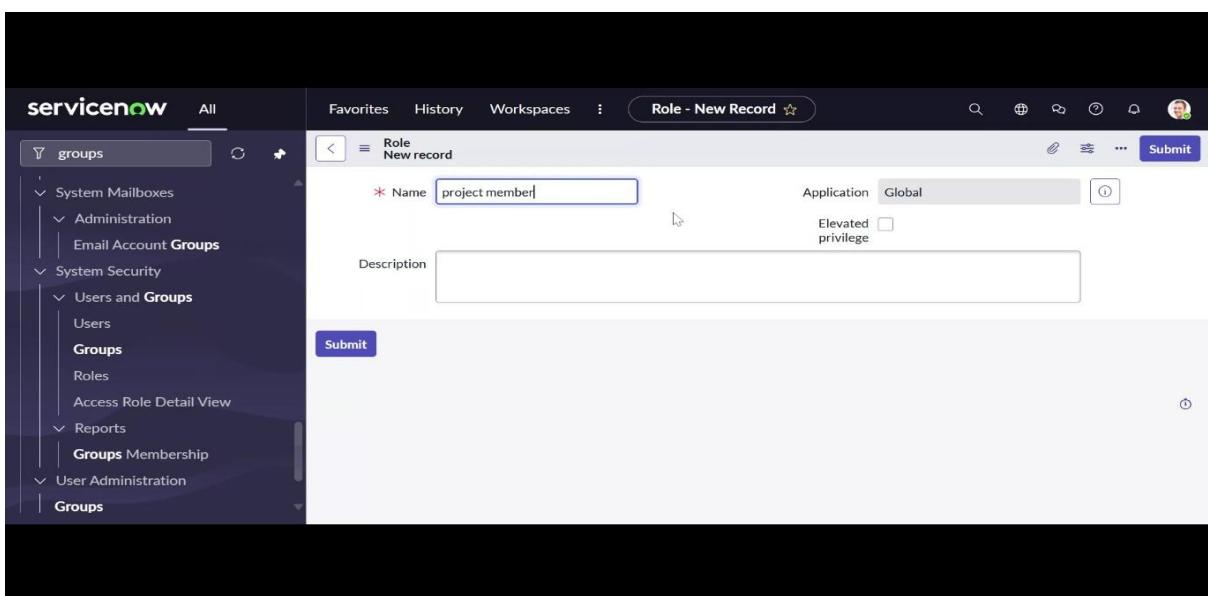
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group

6. Click on submit



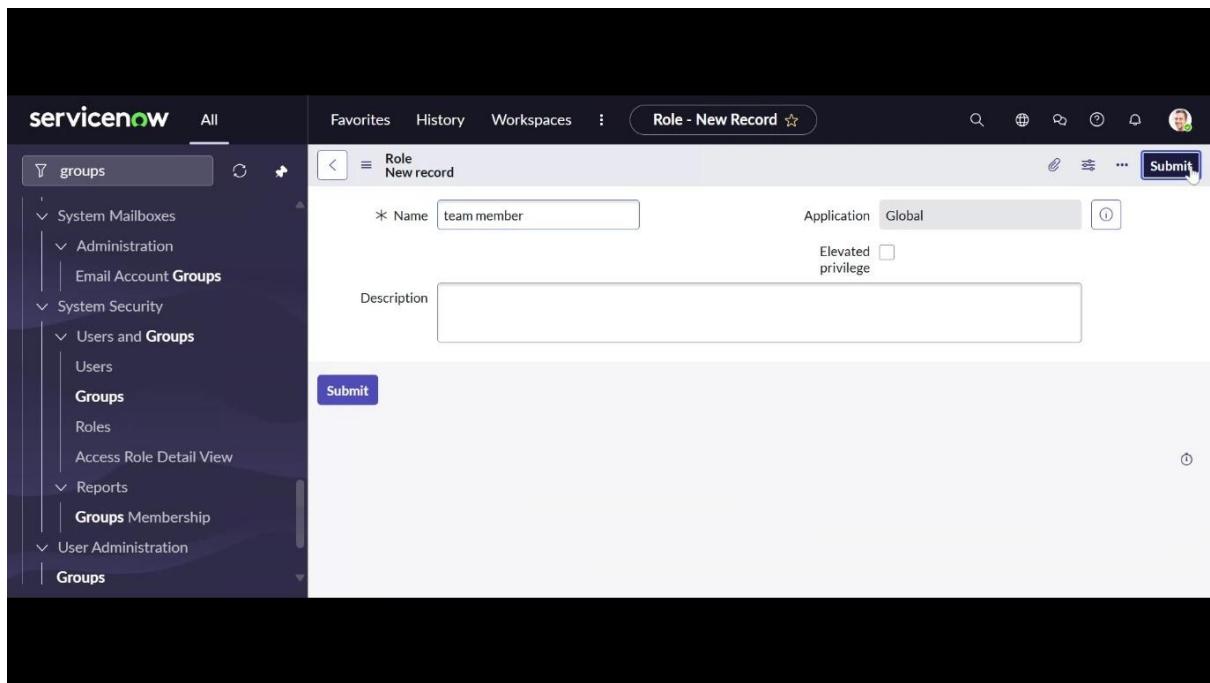
### Milestone 3 : Create Roles

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



## Create one more role:

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



## 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.

The screenshot shows the ServiceNow user interface for managing users. The left sidebar has a search bar for 'user' and a tree view with 'System Security' expanded, showing 'Users and Groups' and 'Users'. The main area shows a user profile for 'User - alice p'. The 'Roles' tab is selected, showing a table with the following data:

Role	State	Inherited
u_project_table_user	Active	false
u_task_table_2_user	Active	false
project member	Active	false

## 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.

The screenshot shows the ServiceNow user interface for managing users. The left sidebar has a search bar for 'user' and a tree view with 'System Security' expanded, showing 'Users and Groups' and 'Users'. The main area shows a user profile for 'User - bob p'. The 'Roles' tab is selected, showing a table with the following data:

Role	State	Inherited
team member	Active	false
u_task_table_2_user	Active	false

## 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

The screenshot shows the ServiceNow application menu configuration for 'project table'. The title is 'Application Menu - project table'. The 'Title' field is set to 'project table', 'Application' is 'Global', and 'Active' is checked. Under 'Roles', 'project member' is selected. The 'Category' is 'Custom Applications'. A tooltip message 'The text that appears in a tooltip when a user points to this application menu' is present at the bottom.

The screenshot shows the ServiceNow application menu configuration for 'task table 2'. The title is 'Application Menu - task table 2'. The 'Title' field is set to 'task table 2', 'Application' is 'Global', and 'Active' is checked. Under 'Roles', 'team member, u\_task\_table\_2\_user, project member' are selected. The 'Category' is 'Custom Applications'. A tooltip message 'The text that appears in a tooltip when a user points to this application menu' is present at the bottom.

## 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

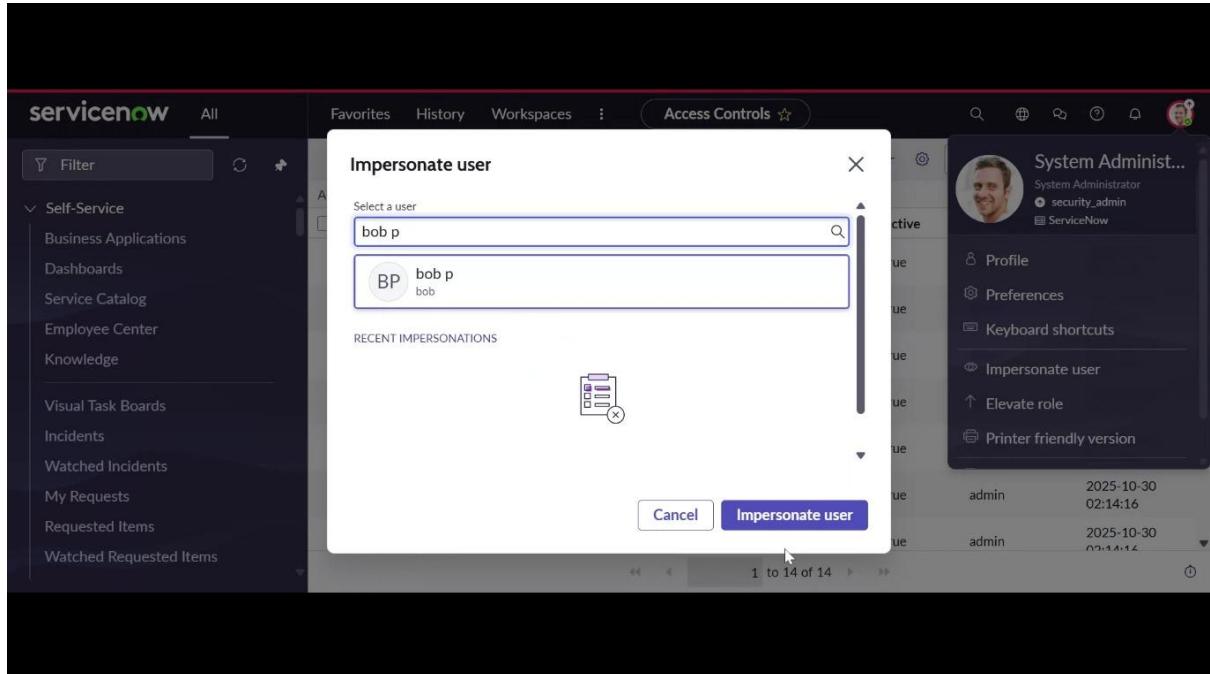
The screenshot shows the 'Access Control - New Record' page in ServiceNow. The form is filled with the following values:

- Type: record
- Operation: create
- Decision Type: Allow If
- Application: Global
- Active: checked
- Admin overrides: checked
- Protection policy: None
- Name: task table 2 [u\_task\_table\_2]
- Description: status
- Applies To: No. of records matching the condition: 0

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

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



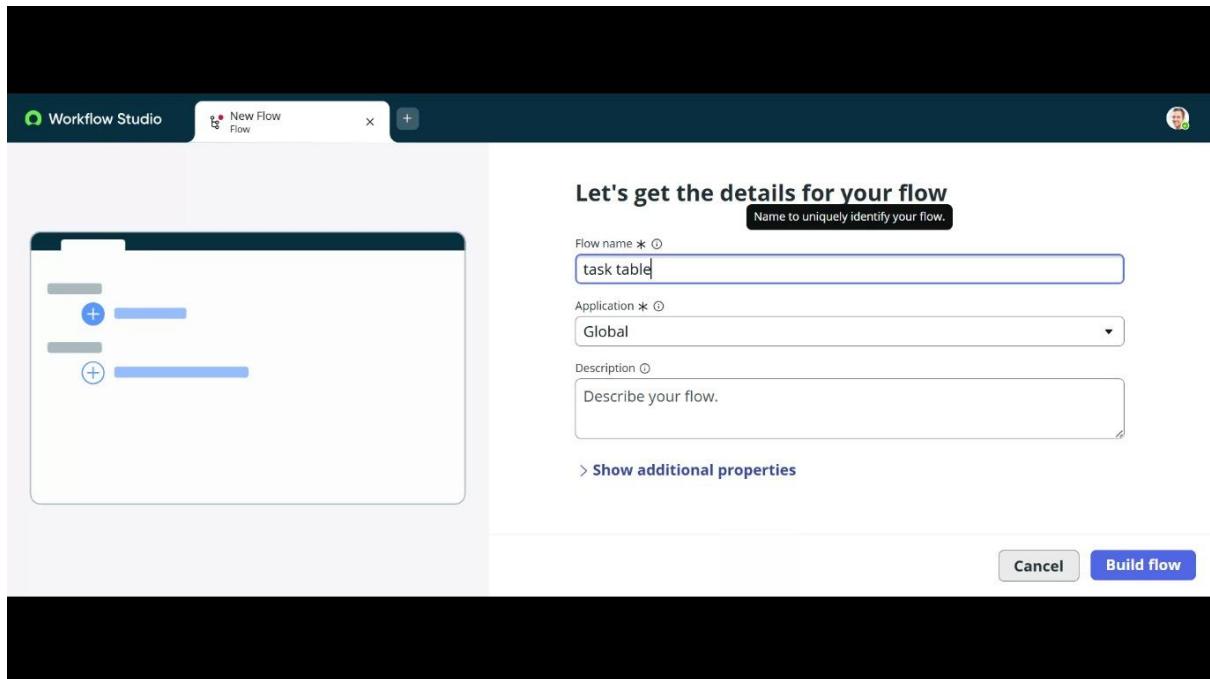
The screenshot shows the 'task table 2 - Create' form in ServiceNow. The title bar says 'task table 2 - Create Created'. The form has several input fields: 'comments' (text input), 'status' (dropdown menu with 'None' selected), 'due date' (date input), 'assigned to' (text input), 'task name' (text input), and 'task id' (text input). There is also a 'Submit' button at the bottom left and another 'Submit' button at the top right.

## 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.

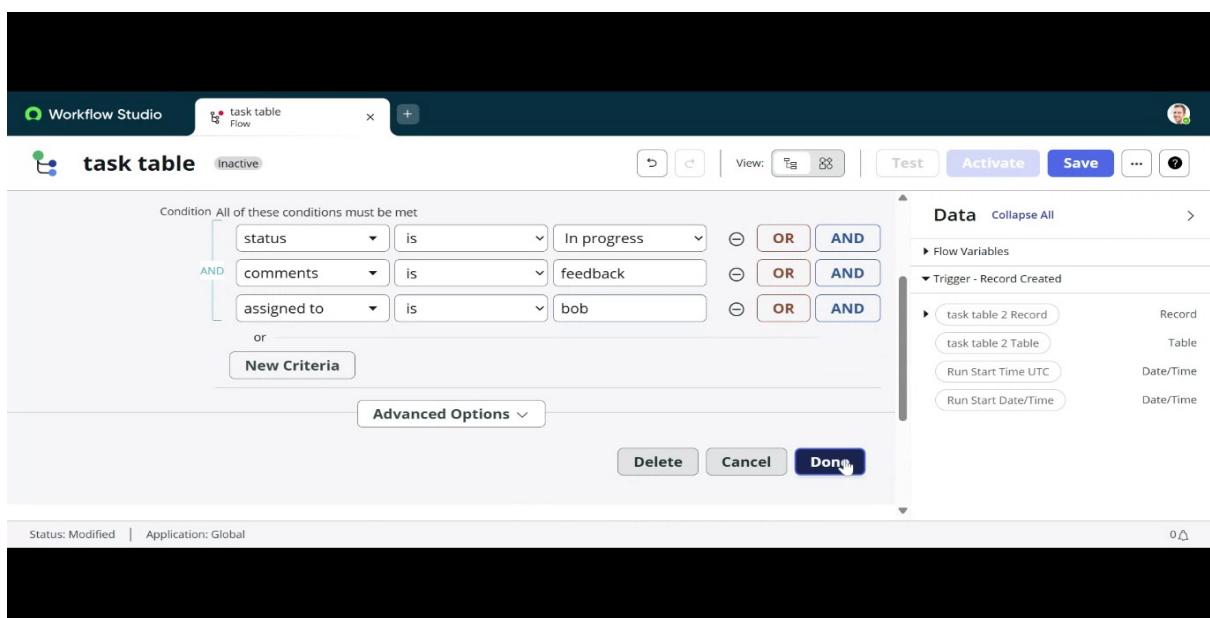
The screenshot shows the ServiceNow search interface with the query 'flow'. The results list includes 'Docker Webhook Answer Subflow' and 'Process Docker Webhook Subflow'. On the left, the navigation bar shows 'Flow Designer' selected under 'Workflow Studio'.

The screenshot shows the Workflow Studio interface with the 'Flows' tab selected. A 'New' dialog is open, listing options: Playbook, Flow, Subflow, Action, and Decision table. The 'Flow' option is highlighted. The right side of the screen displays a sidebar with links to 'Product Documentation', 'ServiceNow Videos', 'Community', 'Centre of Excellence', and 'Developer Portal'.



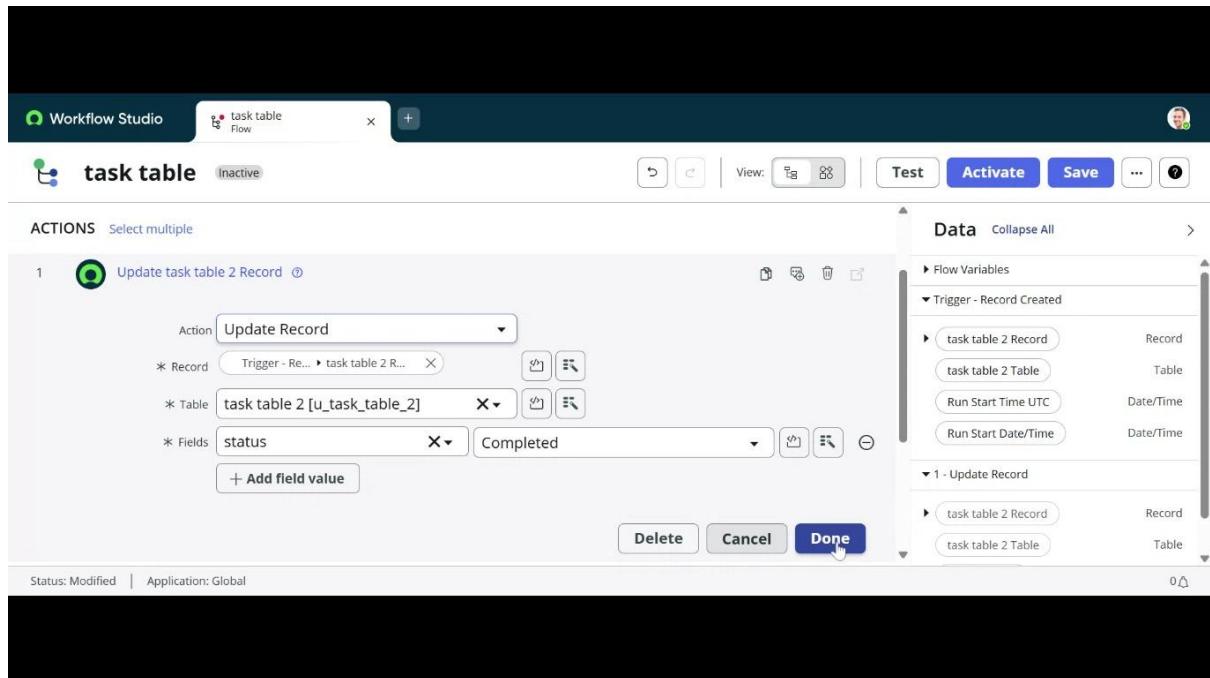
### Next step:

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.



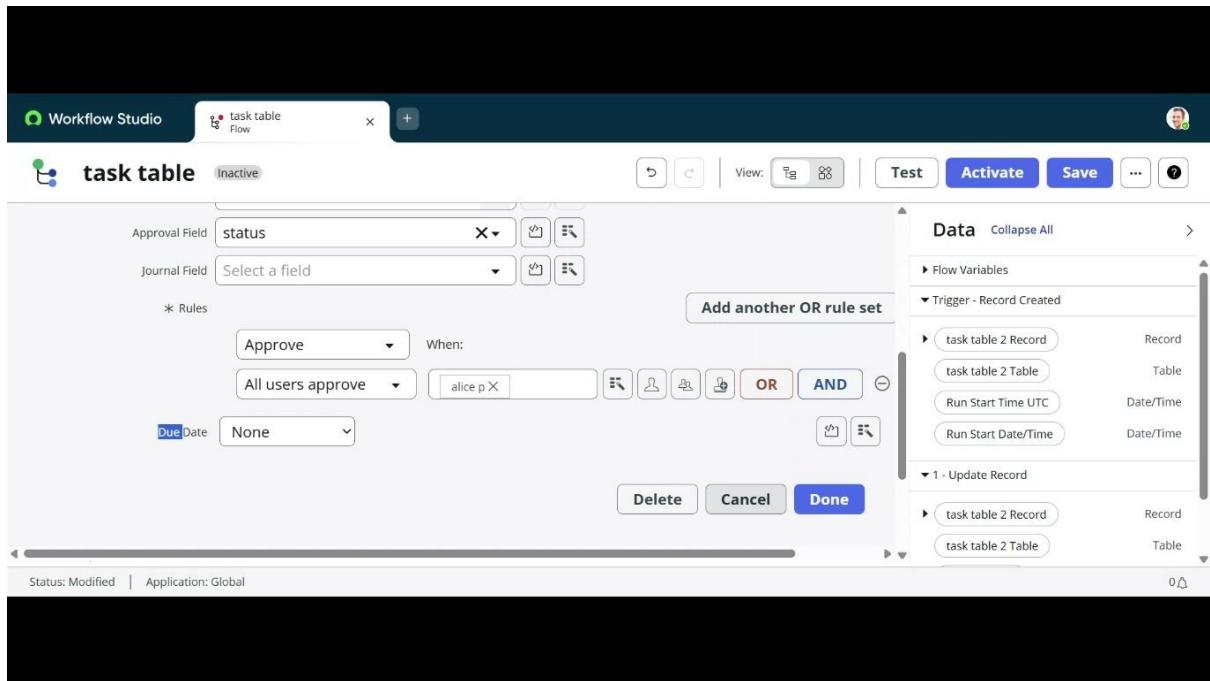
## Next step:

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.

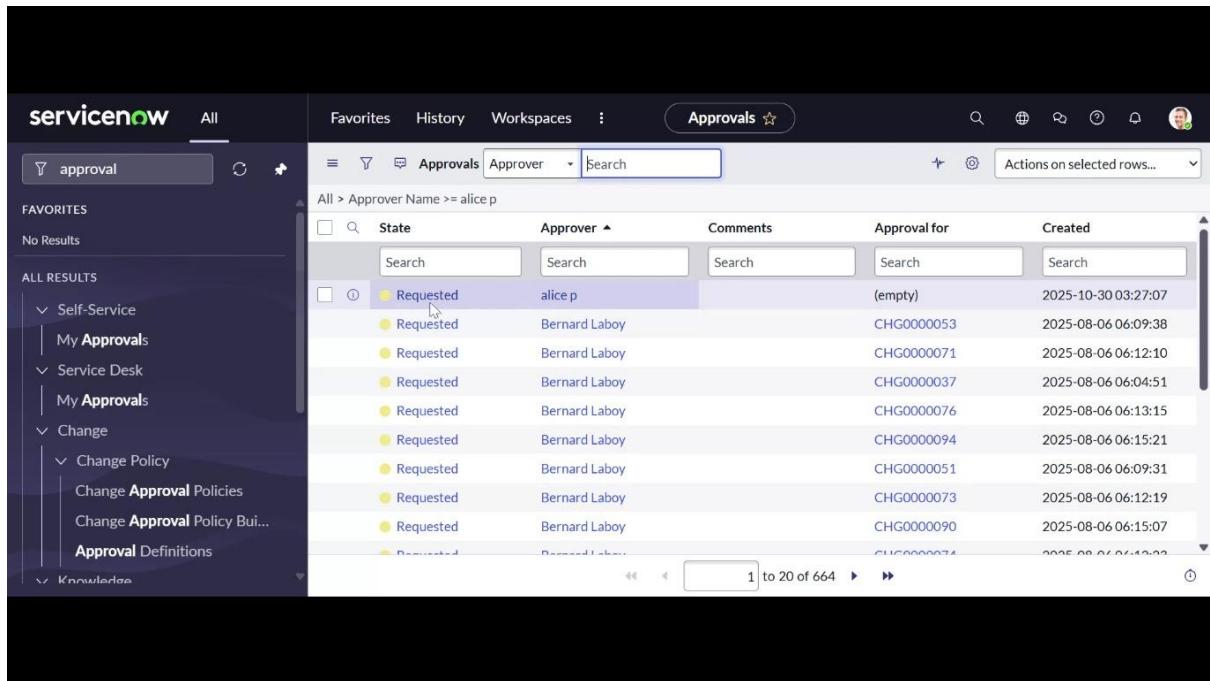


## Next step:

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.



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 shows the ServiceNow interface with the 'Approvals' module selected. The left sidebar has a search bar for 'approval' and a 'FAVORITES' section with 'No Results'. The main area has a header with 'Favorites', 'History', 'Workspaces', 'Approvals', and search/filter options. A message at the top says 'Approved task table 2: Created 2025-10-30 03:27:05'. Below it is a table titled 'All > Approver Name >= alice p'. The table columns are 'State', 'Approver', 'Comments', 'Approval for', and 'Created'. The data shows several entries:

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.