

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

NM ID : 3DF263616B7C86C8BBD44B013523023B

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 'User - New Record' form in ServiceNow. The form is titled 'User - New Record' and has a 'Submit' button. A blue banner at the top states: 'To set up the User's password, save the record and then click Set Password.' The form fields are organized into two columns. The left column contains: 'User ID' (alice), 'First name' (alice), 'Last name' (p), 'Title' (empty), 'Department' (empty), 'Password needs reset' (checkbox), 'Locked out' (checkbox), 'Active' (checkbox, checked), and 'Internal Integration User' (checkbox). The right column contains: '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 'Photo' (Click to add...). The '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 'User - New Record' form in ServiceNow, similar to the previous one but for a user named 'bob'. The form is titled 'User - New Record' and has a 'Submit' button. A blue banner at the top states: 'To set up the User's password, save the record and then click Set Password.' The form fields are organized into two columns. The left column contains: 'User ID' (bob), 'First name' (bob), 'Last name' (p), 'Title' (empty), 'Department' (empty), 'Password needs reset' (checkbox), 'Locked out' (checkbox), 'Active' (checkbox, checked), and 'Internal Integration User' (checkbox). The right column contains: 'Email' (bob@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 'Photo' (Click to add...). The 'Submit' button is located at the bottom right of the form.

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 a form with the following fields: Name (filled with 'project team'), Group email (empty), Manager (empty with a search icon), Parent (empty with a search icon), and 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 is the same as in the previous screenshot. The main content area is titled 'Role - New Record' and contains a form with the following fields: Name (filled with 'project member'), Application (set to 'Global'), Elevated privilege (checkbox, unchecked), and 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 interface for creating a new role. The left sidebar is dark blue with the 'servicenow' logo and a search bar. The main content area is white and titled 'Role - New Record'. It contains the following fields:

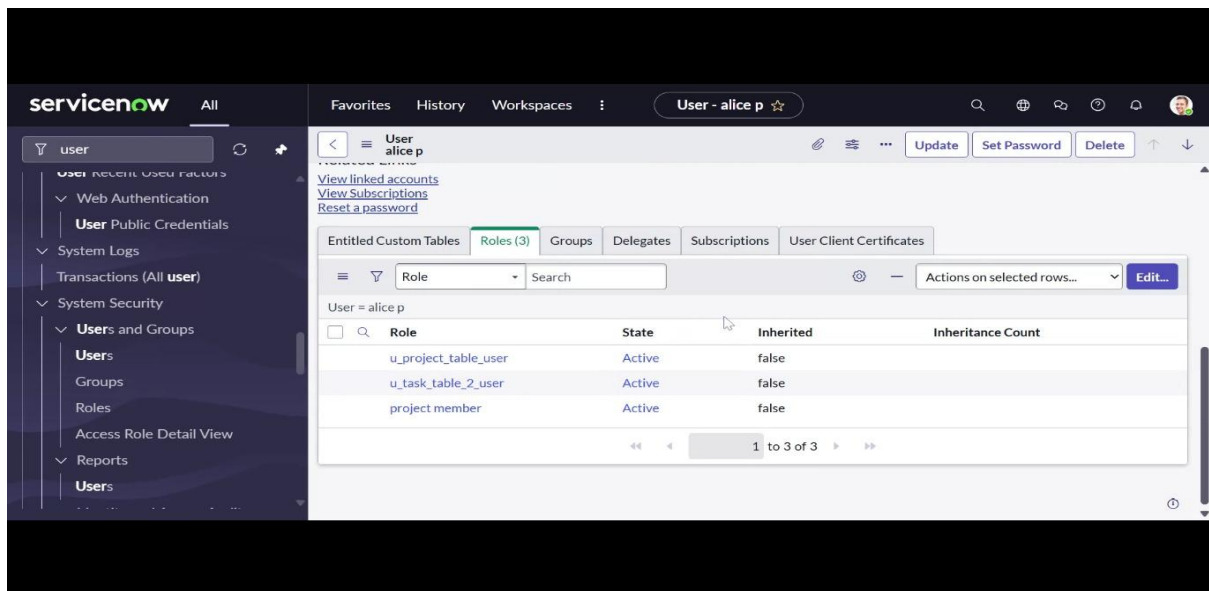
- Name:** team member
- Application:** Global
- Elevated privilege:** ☐
- Description:** (empty text area)

There are two 'Submit' buttons: one in the top right corner and one at the bottom left of the form area.

Milestone 4 : Assign users to groups:

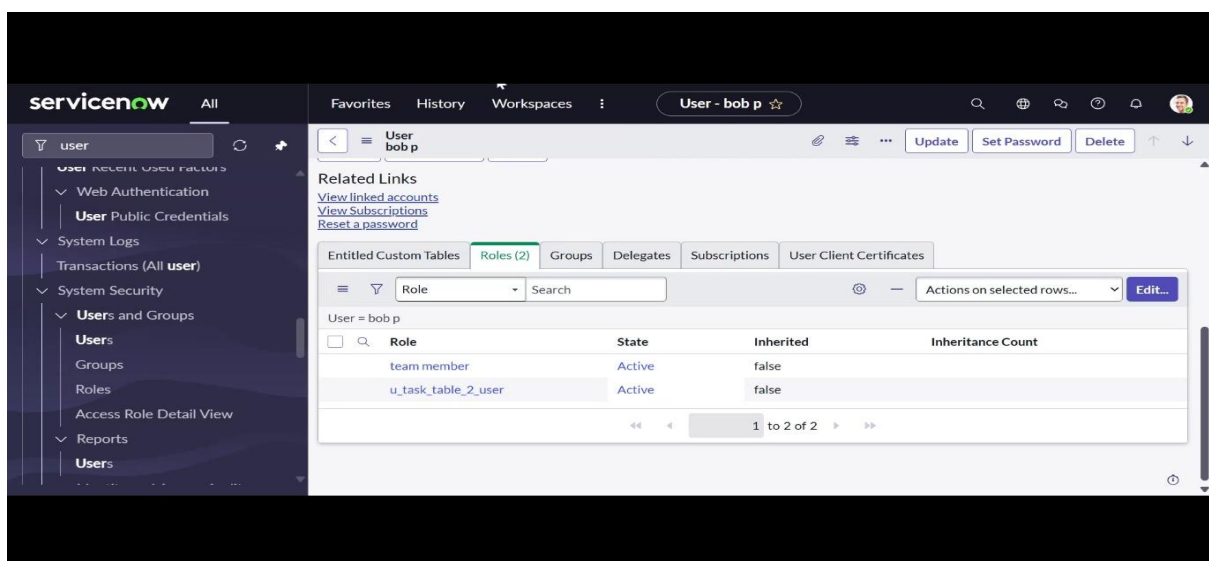
i) Assign roles to Alice user

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.



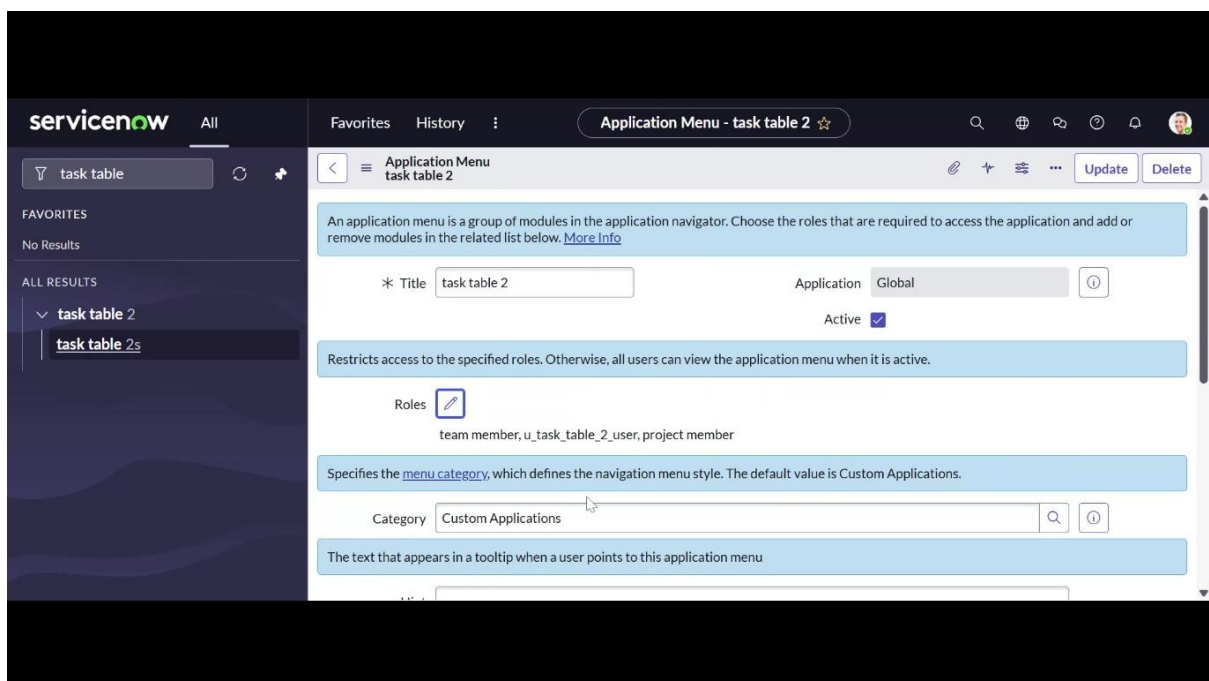
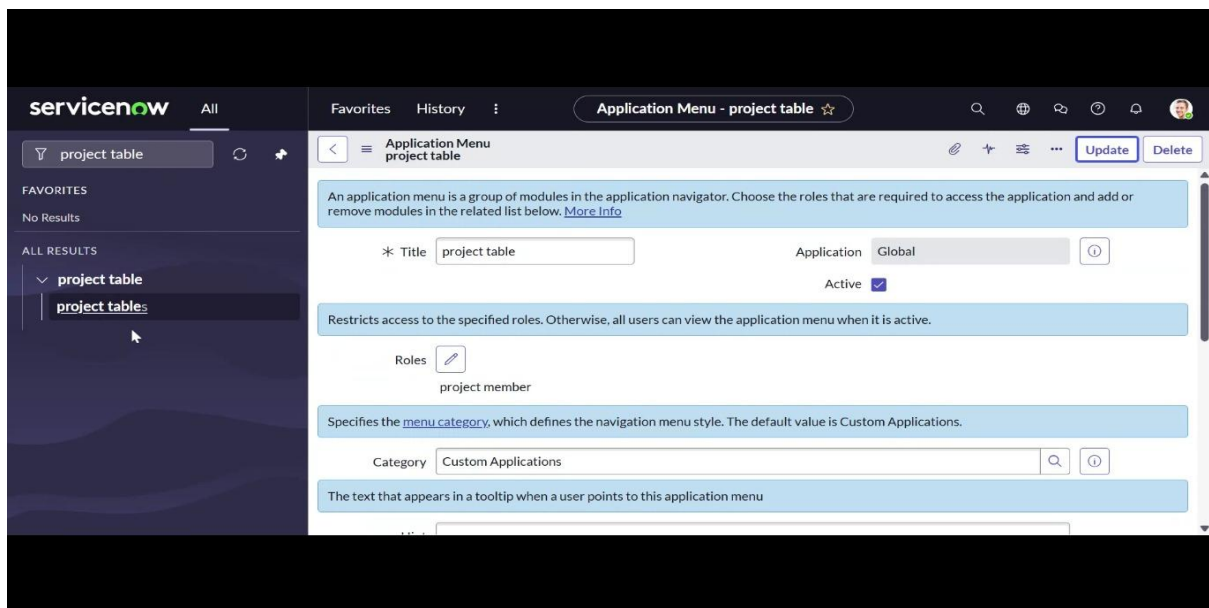
Assign roles to bob user

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

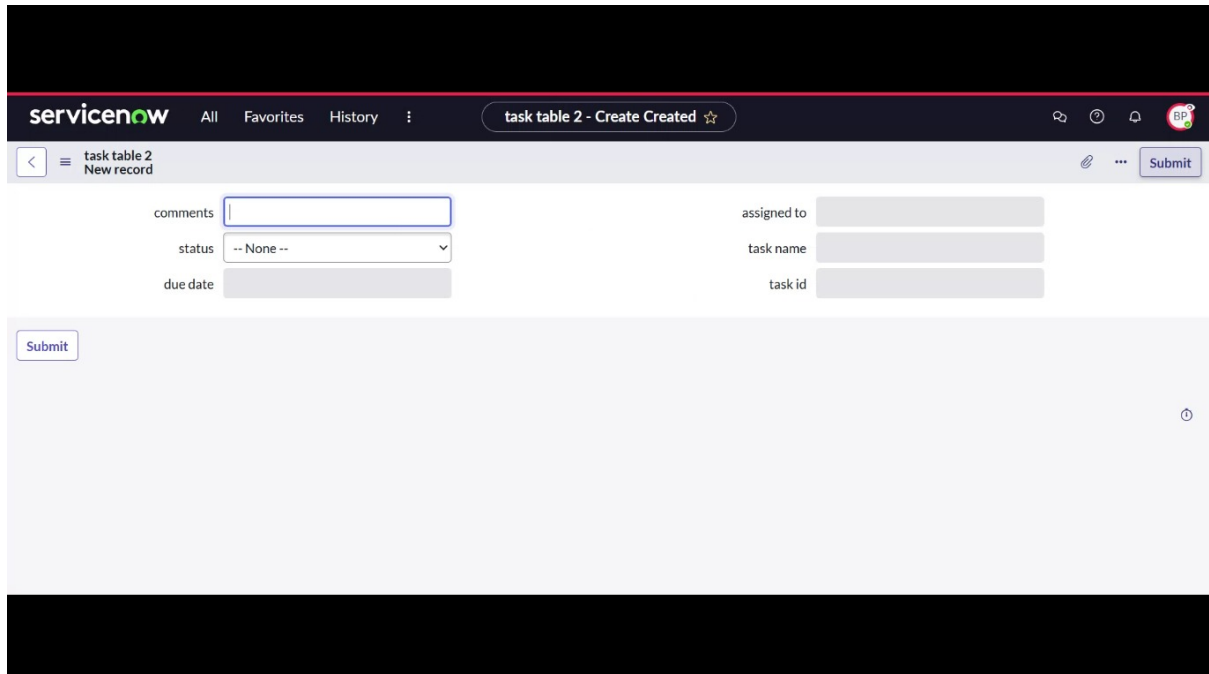
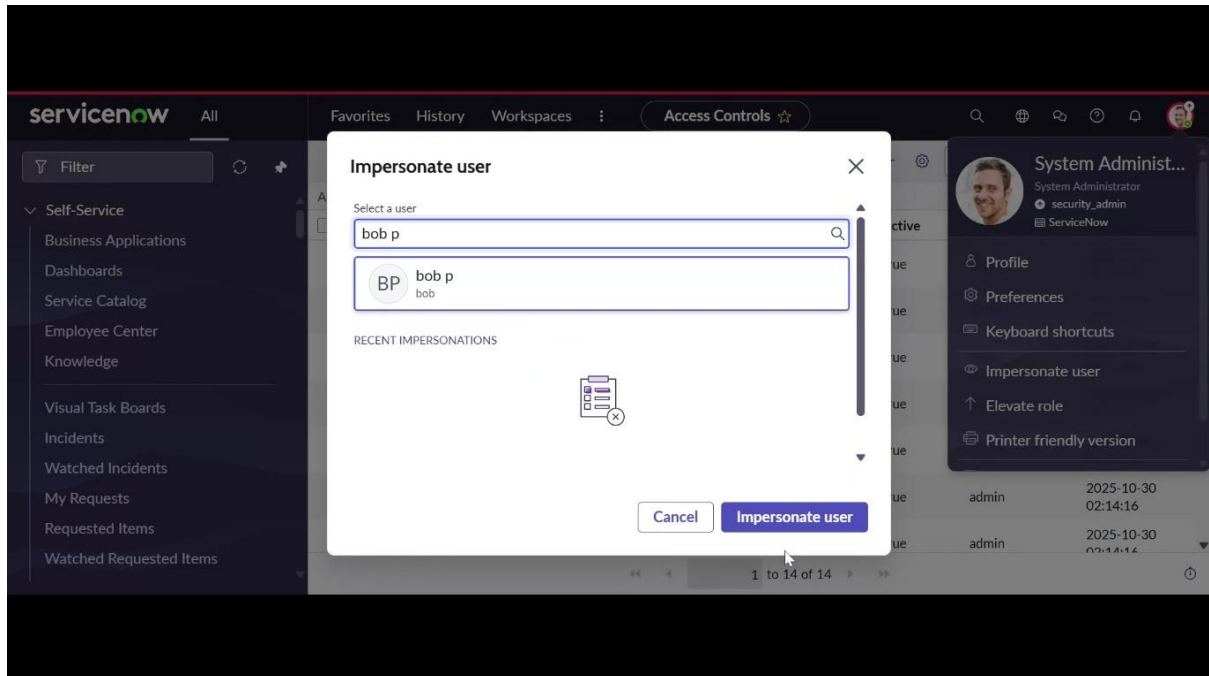
The screenshot shows the 'Access Control - New Record' form in ServiceNow. The left sidebar contains the 'Self-Service' menu with options like Business Applications, Dashboards, Service Catalog, Employee Center, Knowledge, Visual Task Boards, Incidents, Watched Incidents, My Requests, Requested Items, and Watched Requested Items. The main form area has a warning message: 'Warning: A role, security attribute, data condition, or script is required to properly secure access with this ACL.' The form fields include: * 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: (empty), and Applies To: No. of records matching the condition: 0. There are buttons for 'Add Filter Condition' and 'Add "OR" Clause'.

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 a list of access controls created today. The columns are: Name, Decision Type, Operation, Type, Active, Updated by, and Updated. The table contains 7 rows of data.

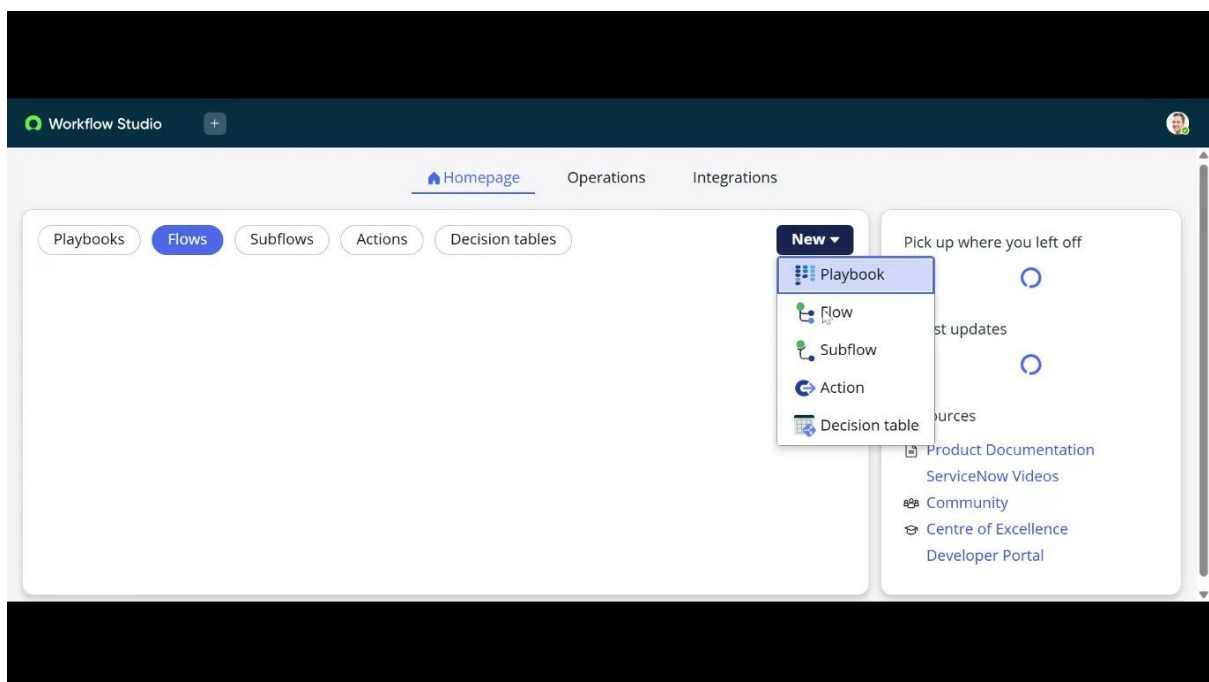
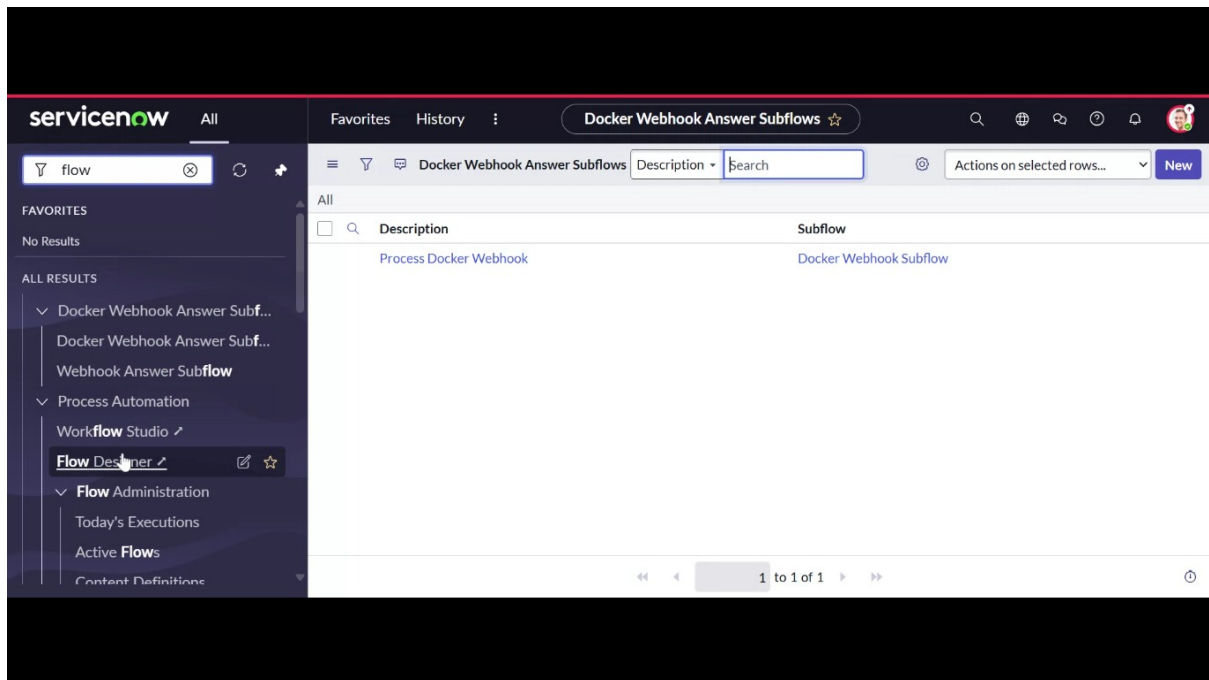
| Name | Decision Type | Operation | Type | Active | Updated by | Updated |
|------------------------------|---------------|-----------|--------|--------|------------|---------------------|
| u_task_table_2 | ALLOW IF | WRITE | record | true | admin | 2025-10-30 02:14:16 |
| u_task_table_2.u_assigned_to | 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



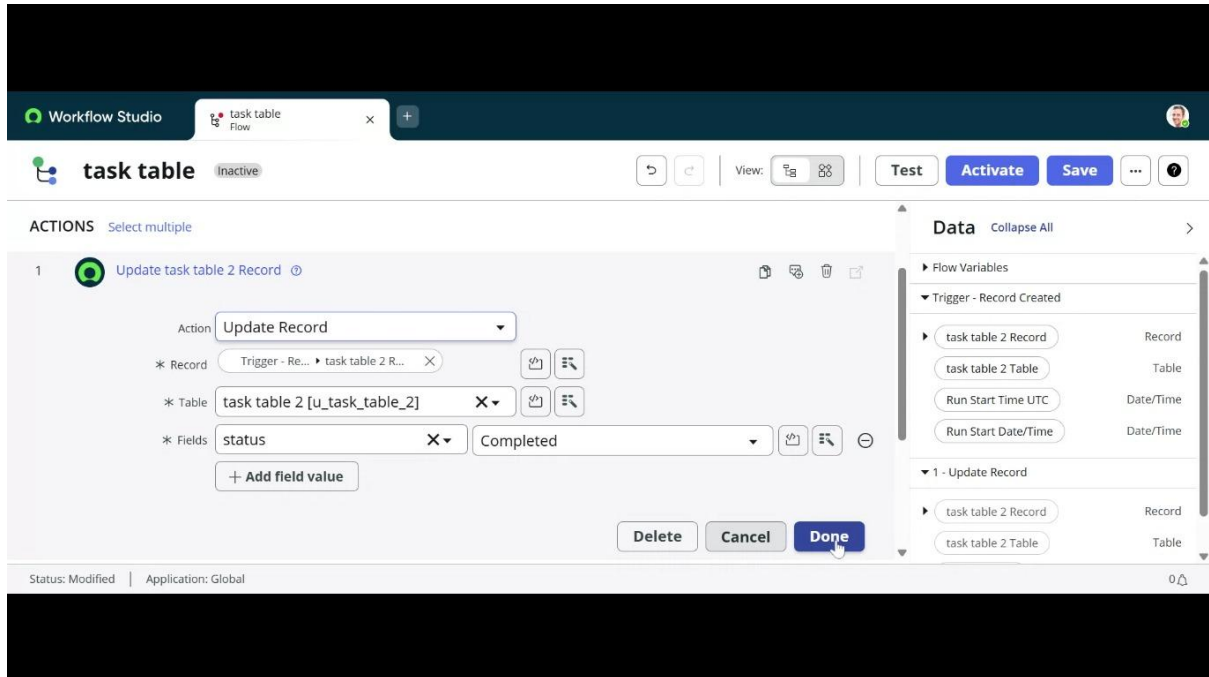
Milestone 7 : Create a Flow to Assign operations ticket to group

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.



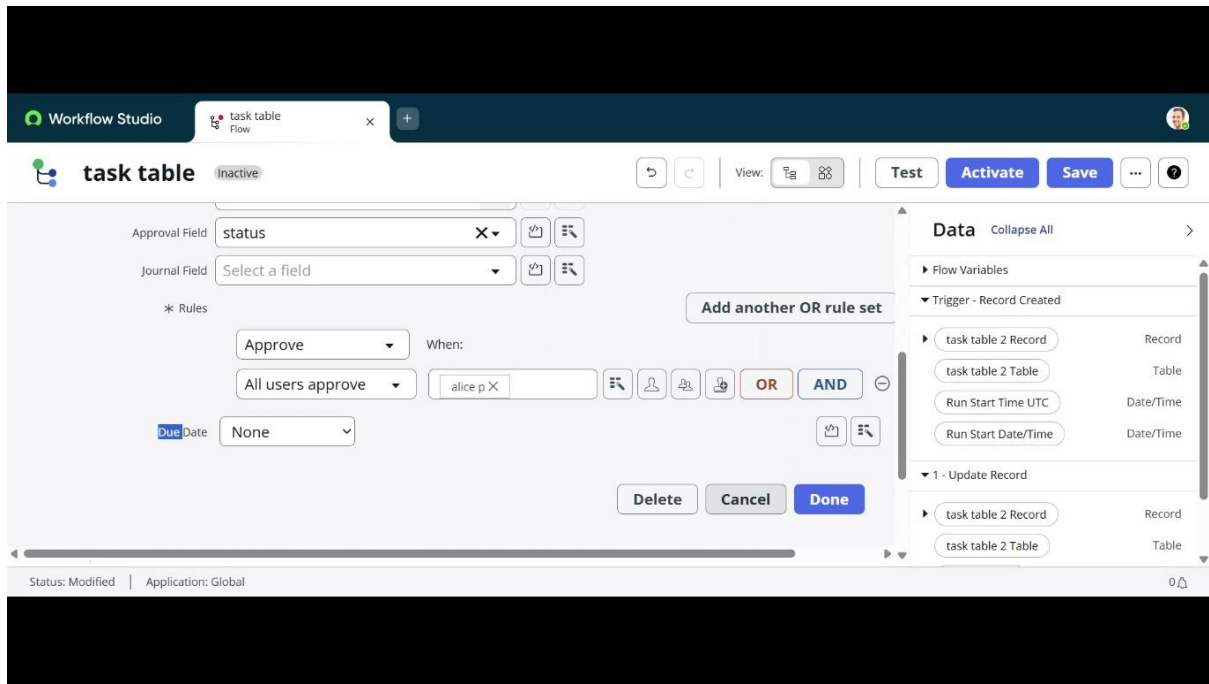
Next step:

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.

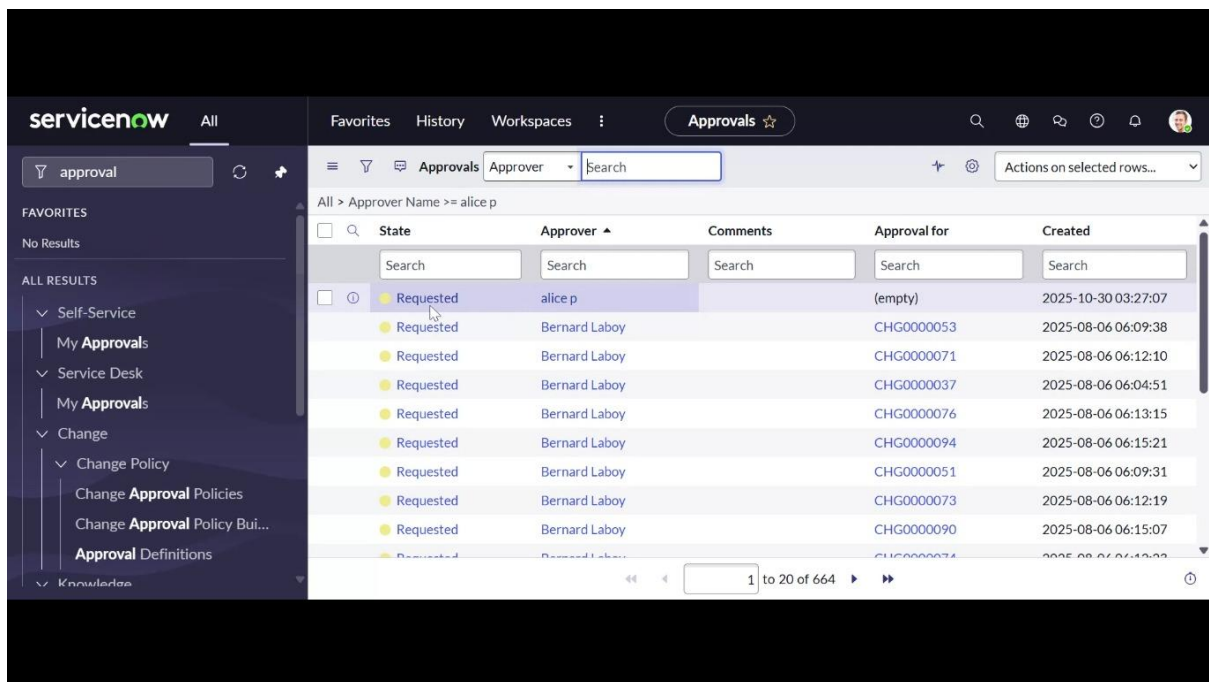


Next step:

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.