

Project Title

OPTIMIZING USER,GROUP,AND ROLE MANAGEMENT WITH ACCESS CONTROL AND WORLFWOWS

Team Id: NM2025TMID13118

Team Members:4

Team Leader : KESHIKA .V

Team Member 1 : GOKILASRI .V

Team Member 2 : SHAMULI .S

Team Member 3 : ABINAYA .K

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.

Objective:

Enhance User Experience:

Provide personalized and intuitive experiences for students, faculty, and staff, ensuring they have the tools and support needed to excel.

Improve Operational Efficiency:

Streamline core institutional processes by automating administrative tasks, which improves productivity across departments.

Foster Digital Transformation:

Modernize the institution by adopting digital tools and processes to adapt to the evolving demands of the digital economy and prepare students for the future.

TASK INITIATION

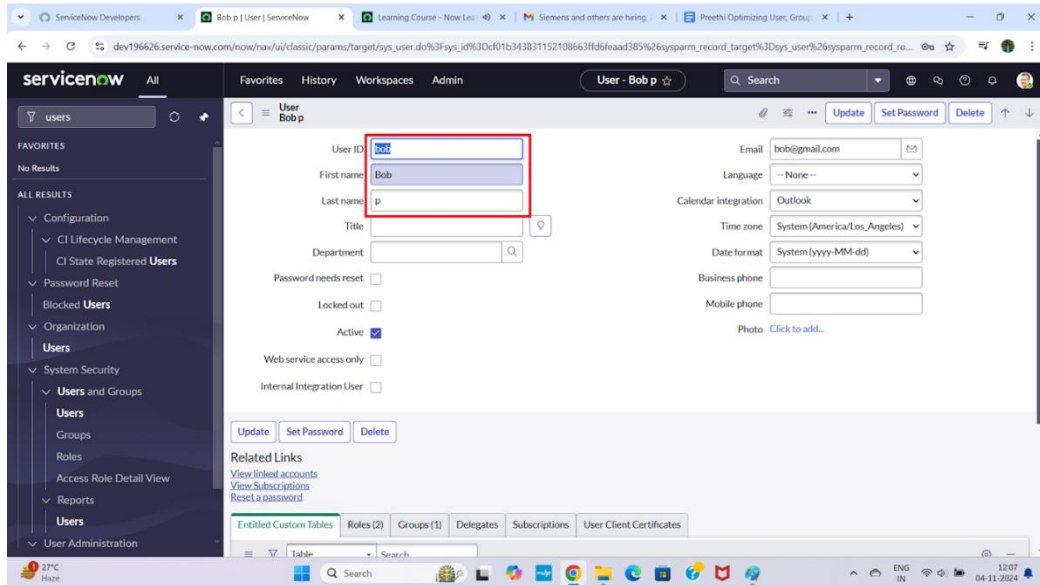
Create Users

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

The screenshot shows the ServiceNow user creation interface. The left sidebar contains a navigation menu with 'users' selected. The main form is titled 'User - alice p' and includes fields for User ID (alice), First name (alice), Last name (p), Title, Department, Email (alice@gmail.com), Language, Calendar integration (Outlook), Time zone (System (America/Los Angeles)), Date format (System (yyyy-MM-dd)), Business phone, and Mobile phone. There are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), 'Web service access only', and 'Internal Integration User'. At the bottom, there are buttons for 'Update', 'Set Password', and 'Delete'. The bottom of the screen shows a Windows taskbar with the date 04-11-2024.

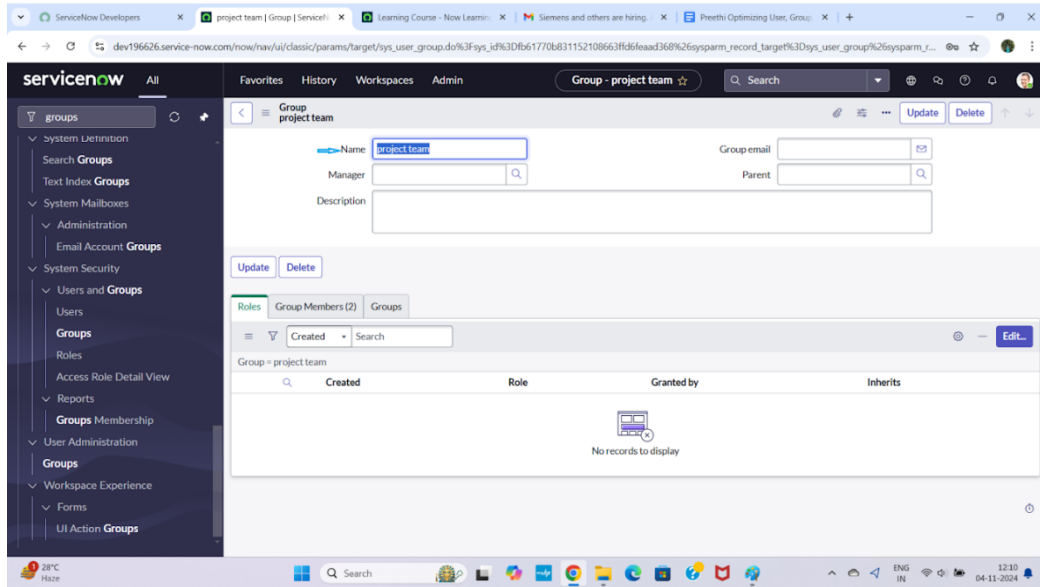
Create one more user:

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



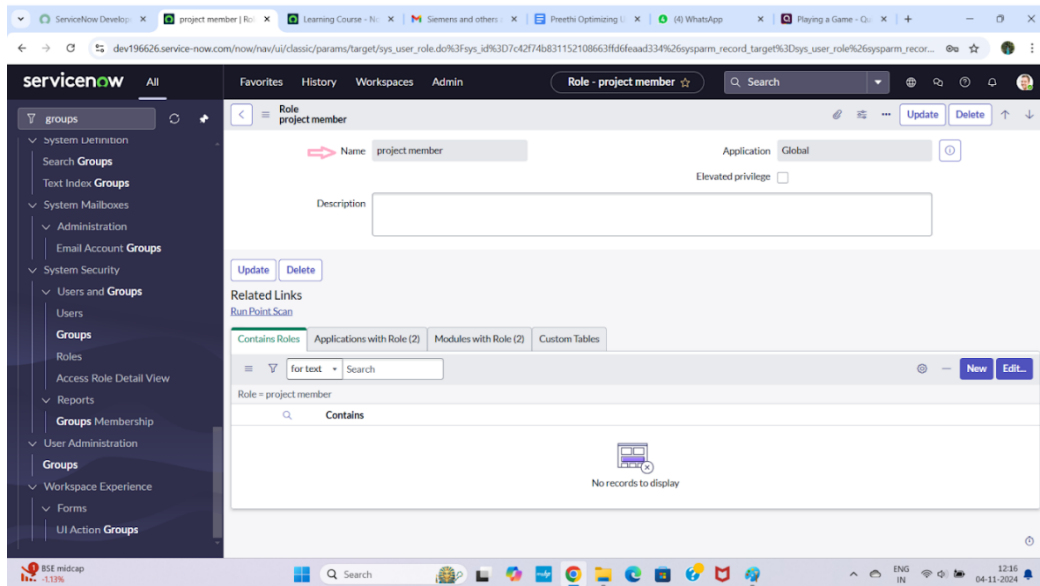
Create Groups

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



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

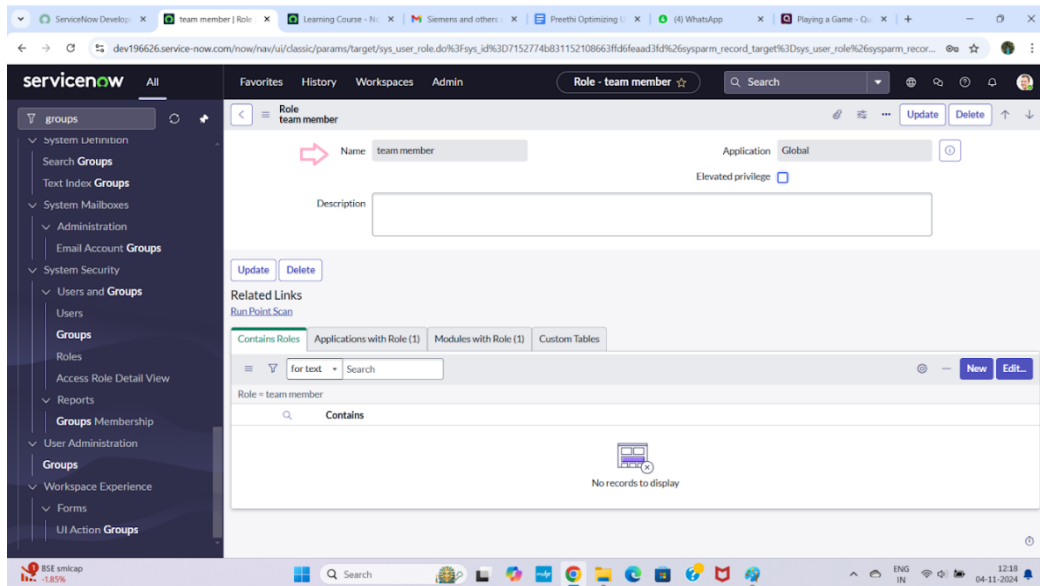


Create one more role:

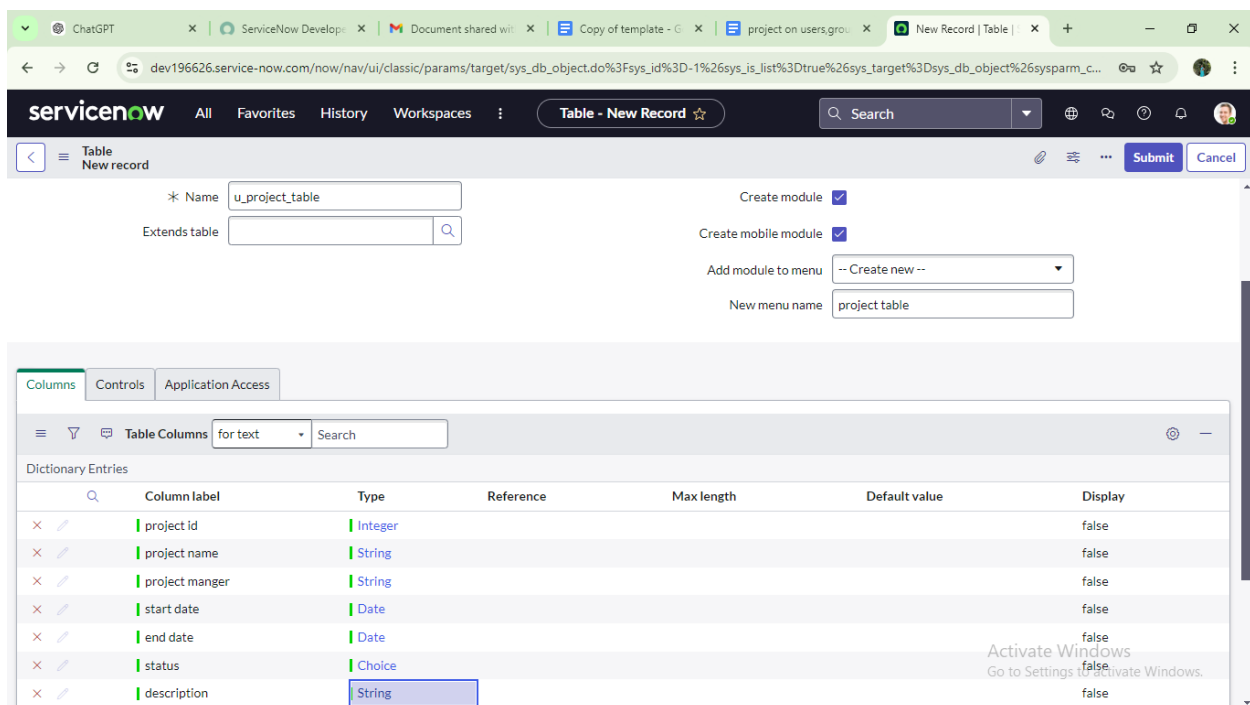
7. Create another role with the following details : Team member
8. Click on submit

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.

Table - task table 2

Table Columns: for text Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Updated by	String	(empty)	40	40	false
Updates	Integer	(empty)	40	40	false
Updated	Date/Time	(empty)	40	40	false
Sys ID	Sys ID (GUID)	(empty)	32	32	false
Created by	String	(empty)	40	40	false
Created	Date/Time	(empty)	40	40	false
task id	Integer				false
task name	String				false
assigned to	String				false
due date	Date				false
status	Choice				false
comments	String				false

Activate Windows
Go to Settings to activate Windows.

Assign users to project team group

1. Open service now.

2. Click on All >> search for groups

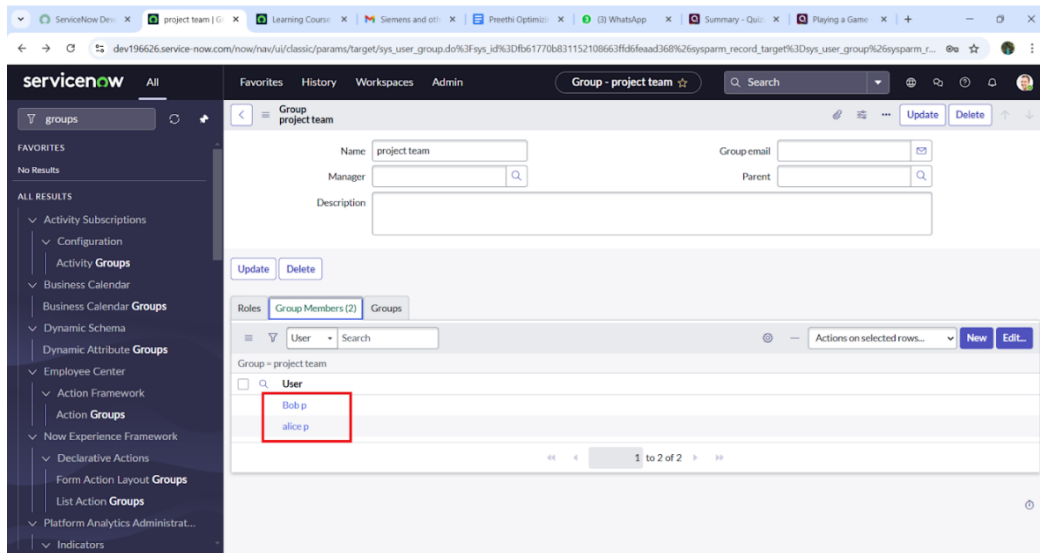
3. Select tables under system definition

4. Select the project team group

5. Under group members

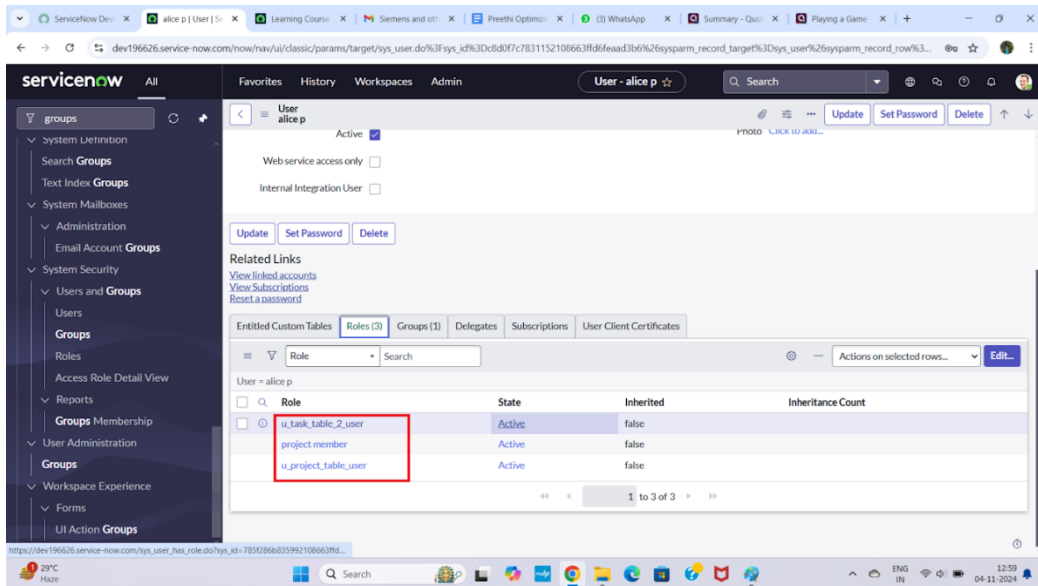
6. Click on edit

7. Select alice p and bob p and save



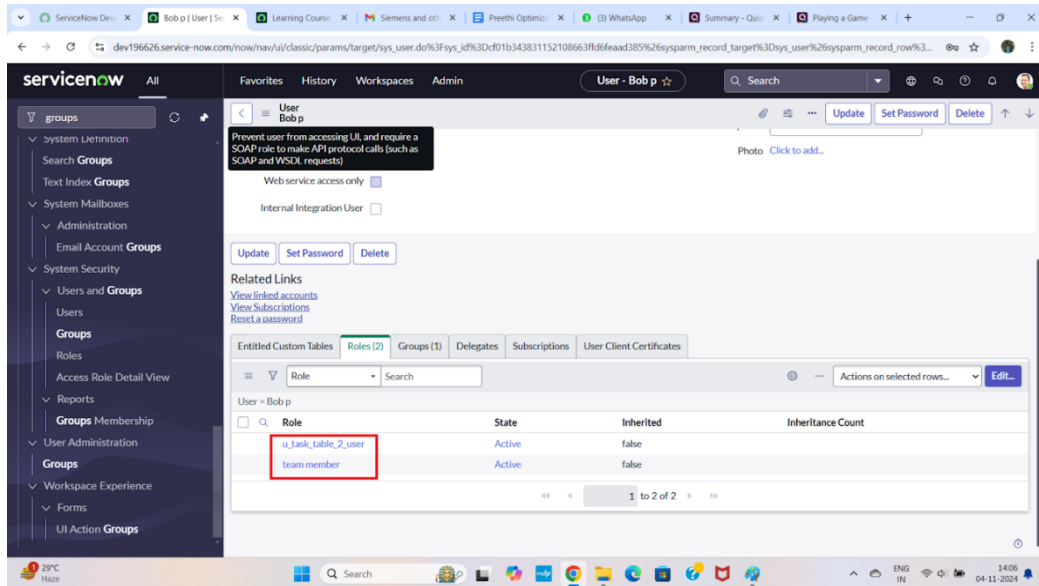
Assign roles to alice user

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.



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

Copy of template - Google Doc...project on users,groups,roles,ti...ServiceNow Developersproject table | Application Menu

dev196626.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D9705334f831152108663ffd6feaad362

servicenowAllFavoritesHistoryAdminApplication Menu - project tableSearch

Application Menuproject table

UpdateDelete

An application menu is a group of modules in the application navigator. Choose the roles that are required to access the application and add or remove modules in the related list below. [More Info](#)

* Titleproject table

ApplicationGlobal

Active☒

Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.

Roles

project member

Specifies the [menu category](#), which defines the navigation menu style. The default value is Custom Applications.

CategoryCustom Applications

The text that appears in a tooltip when a user points to this application menu

Hint

Description

UpdateDelete

Activate Windows
Go to Settings to activate Windows.

Copy of template - Google Doc...ServiceNow Developersproject table | Application Menu...task table 2 | Application Menu...ChatGPT

dev196626.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D114bece3835992108663ffd6feaad3dc

servicenowAllFavoritesHistoryAdminApplication Menu - task table 2Search

Application Menutask table 2

UpdateDelete

↑ Titletask table 2

ApplicationGlobal

Active☒

Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.

Roles

u_task_table_2_user, project member, team member

Specifies the [menu category](#), which defines the navigation menu style. The default value is Custom Applications.

CategoryCustom Applications

The text that appears in a tooltip when a user points to this application menu

Hint

Description

UpdateDelete

Activate Windows
Go to Settings to activate Windows.

ModulesOrderSearch

Actions on selected rows...New

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

Warning: A role, security attribute, data condition, or script is required to properly secure access with this ACL.

* Type: record

* Operation: write

Decision Type: Allow If

Application: Global

Active: ☒

Advanced: ☐

Admin overrides: ☒

Protection policy: -- None --

* Name: task table 2 [u_task_table_2]

status

Description:

Applies To: No. of records matching the condition: 1

Add Filter Condition Add "OR" Clause

-- choose field -- -- oper -- -- value --

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

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 ServiceNow 'Access Controls' page. The table lists records with columns: Name, Decision Type, Operation, Type, Active, Updated by, and Updated. A red box highlights the following records:

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_leave_request	Allow If	delete	record	true	admin	2024-10-22 02:27:59
u_leave_request	Allow If	create	record	true	admin	2024-10-22 02:27:59
u_task_table	Allow If	read	record	true	admin	2024-10-22 04:21:28
u_task_table	Allow If	write	record	true	admin	2024-10-22 04:20:15
u_task_table.u_assigned_to	Allow If	write	record	true	admin	2024-10-22 04:33:53
u_task_table.u_due_date	Allow If	write	record	true	admin	2024-10-22 04:33:14
u_task_table.u_task_id	Allow If	write	record	true	admin	2024-10-22 04:27:47
u_task_table.u_task_name	Allow If	write	record	true	admin	2024-10-22 04:31:14

Below the highlighted records, the record 'u_task_table_2' is selected, and a red arrow points to its 'u_assigned_to' field.

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_task_table_2	Allow If	write	record	true	admin	2024-10-22 21:05:07
u_task_table_2	Allow If	read	record	true	admin	2024-10-22 21:26:57
u_task_table_2	Allow If	read	record	true	admin	2024-10-22 21:05:07
u_task_table_2	Allow If	write	record	true	admin	2024-10-22 21:28:27
u_task_table_2	Allow If	create	record	true	admin	2024-10-22 21:05:06
u_task_table_2	Allow If	delete	record	true	admin	2024-10-22 21:05:07
u_task_table_2.u_assigned_to	Allow If	write	record	true	admin	2024-10-22 21:31:20

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

task id

task name

status

assigned to

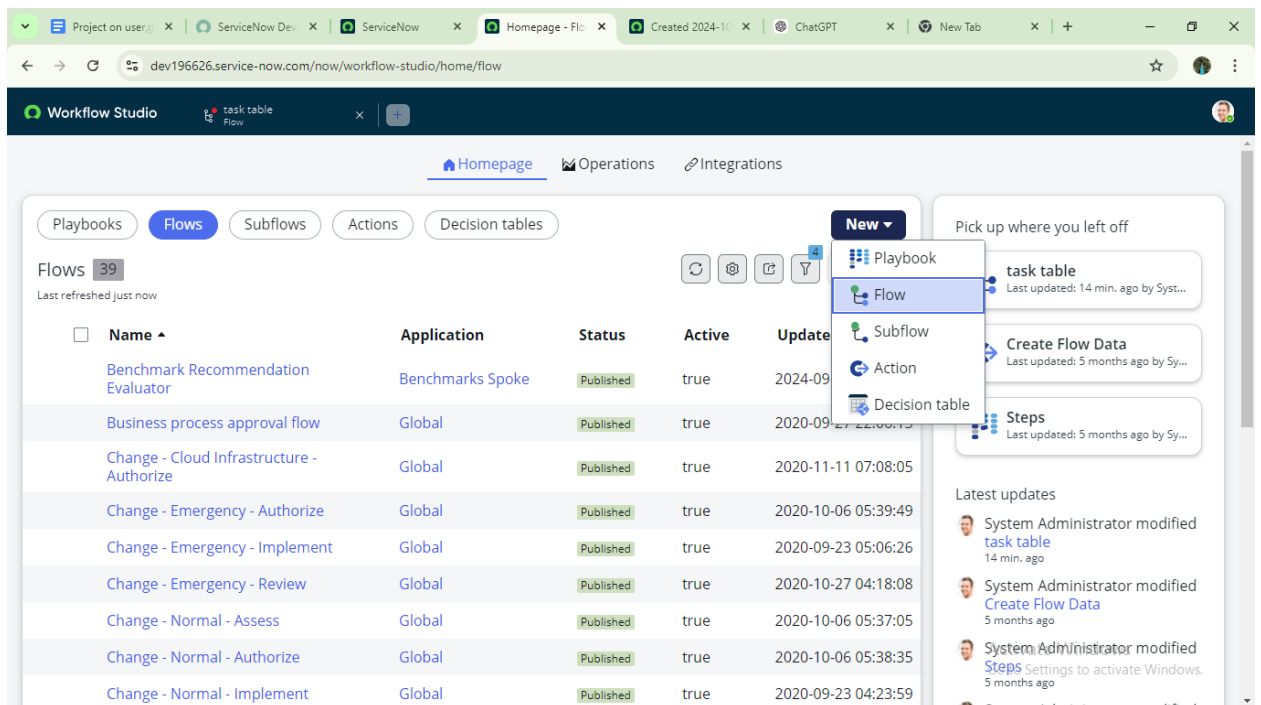
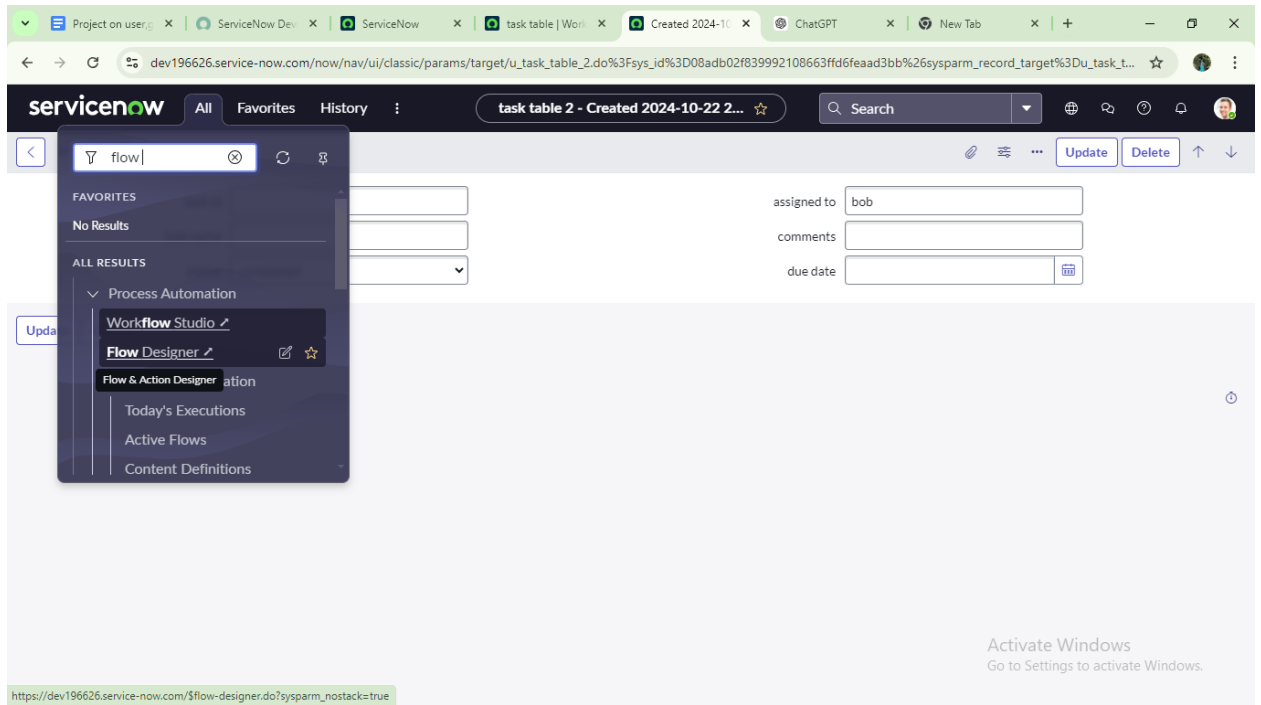
comments

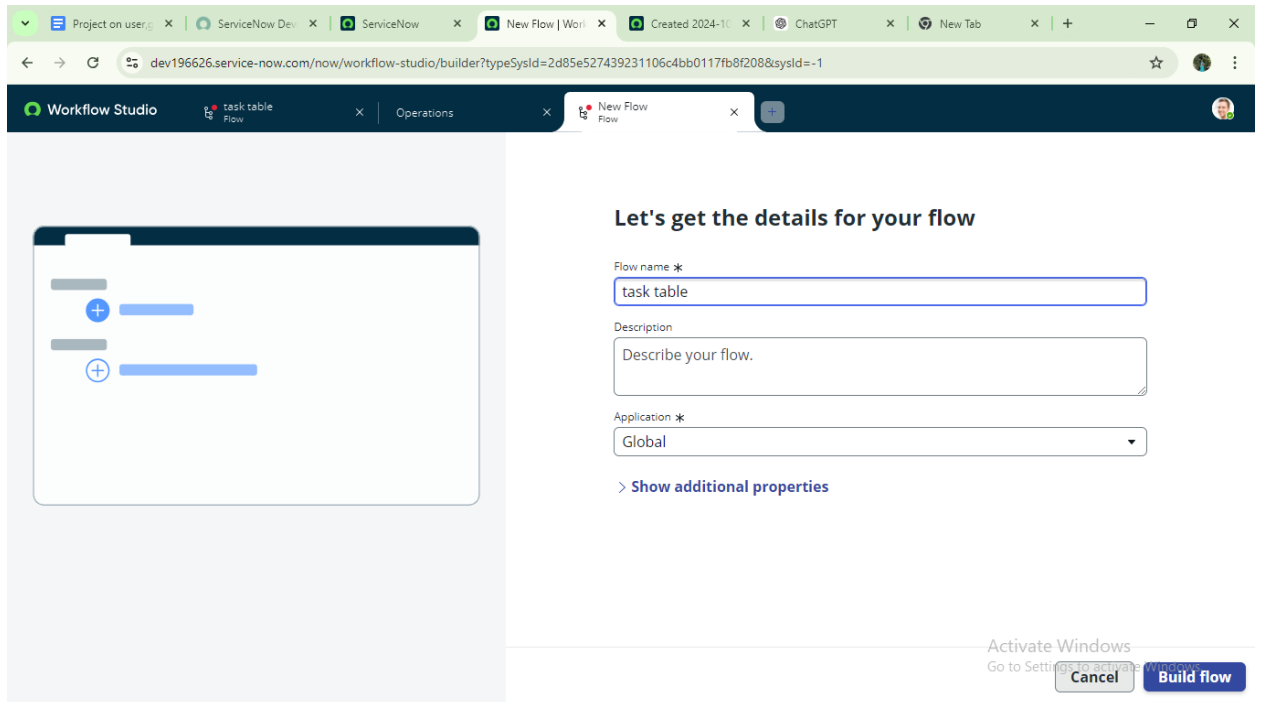
due date

Activate Windows
Go to Settings to activate Windows.

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.





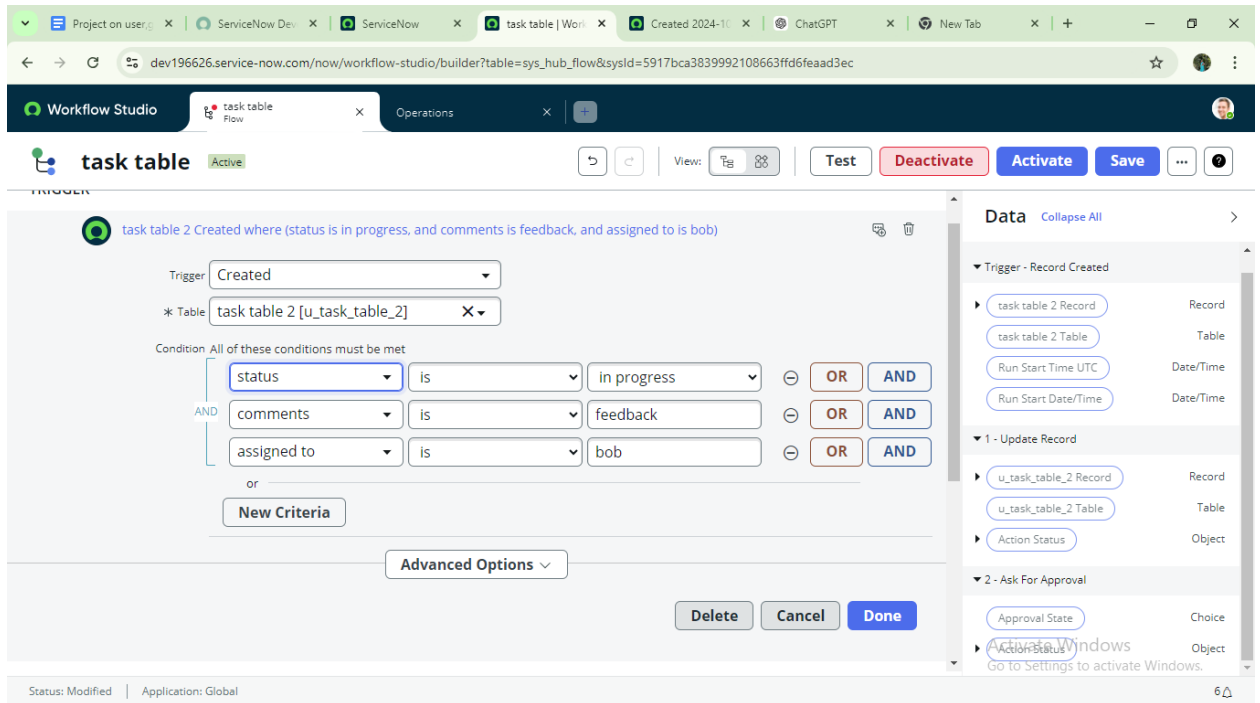
next step:

1. Click on Add 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

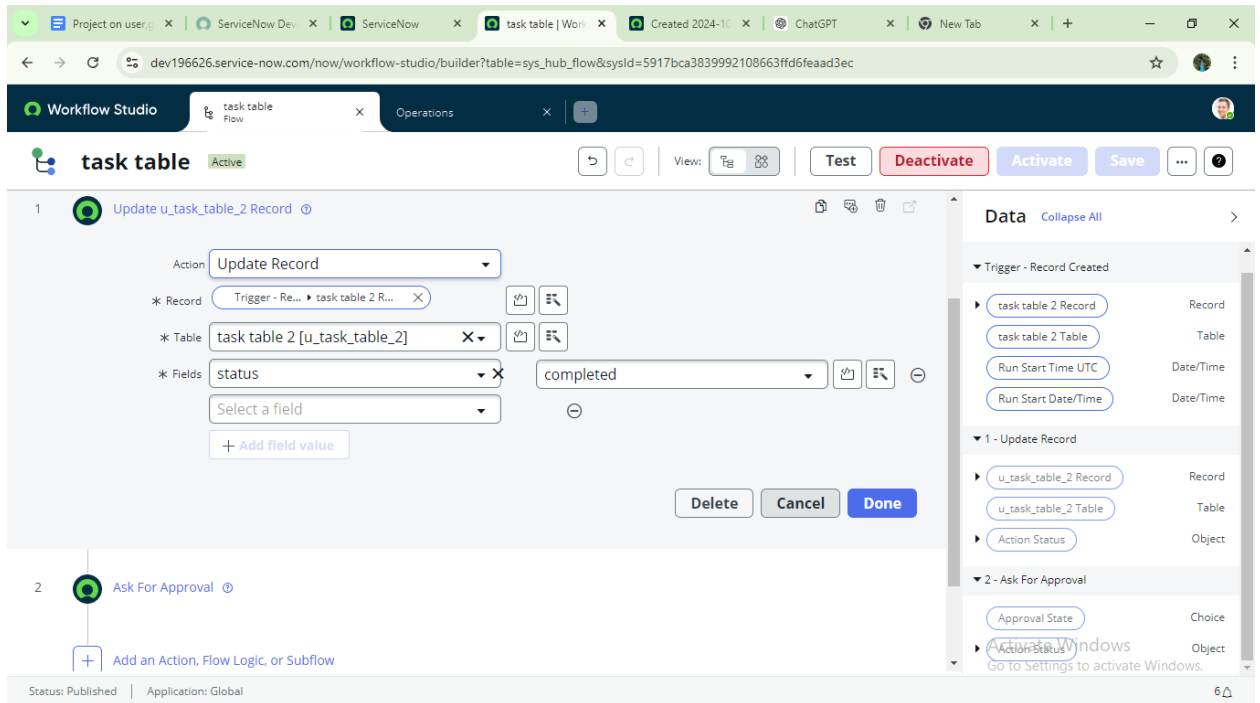
Field : assigned to Operator :is Value : bob

5.After that click on Done.



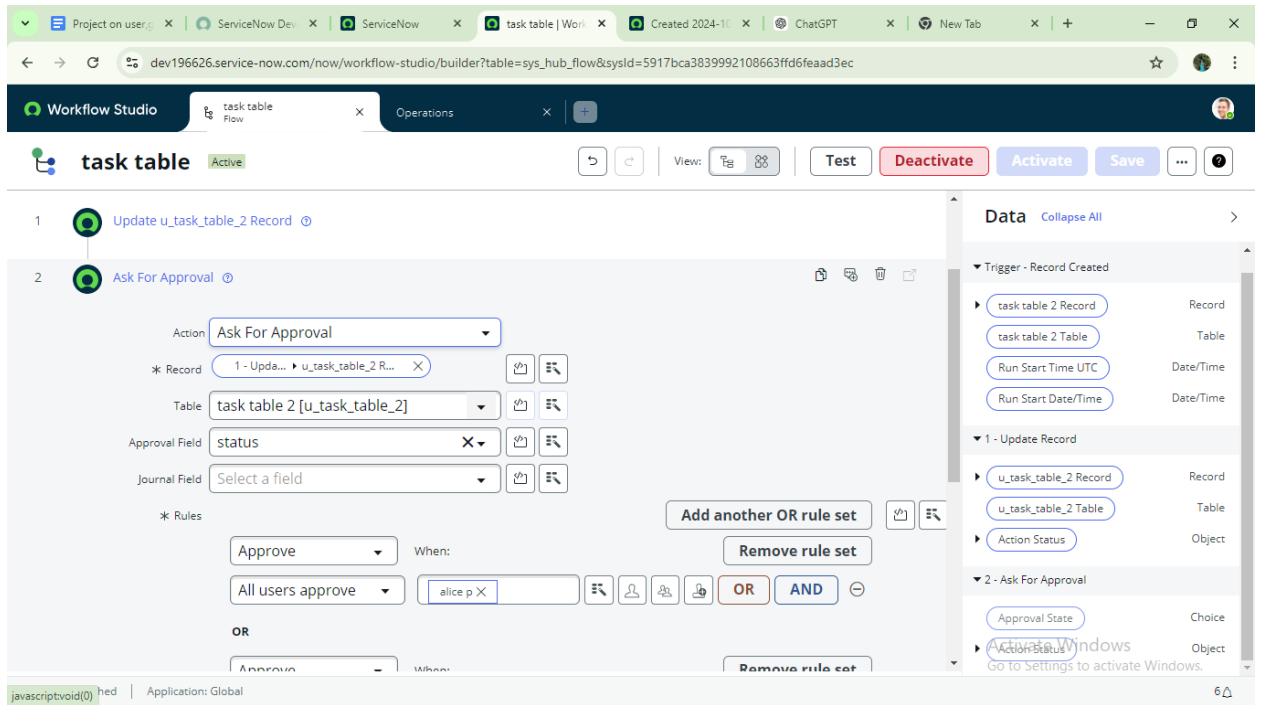
Next step:

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

Project on user | ServiceNow Dev | ServiceNow | task table | Work | Created 2024-10-22 22:25:18 | ChatGPT | New Tab

dev196626.service-now.com/now/nav/ui/classic/params/target/u_task_table_2.do%3Fsys_id%3D08adb02f839992108663ffd6feaad3bb%26sysparm_record_target%3Du_task_t...

task table 2 - Created 2024-10-22 22:25:18

task id assigned to

task name comments

status due date

Update Delete

Activate Windows
Go to Settings to activate Windows.

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

servicenow					
All Favorites History Workspaces Approvals					
Search					
Actions on selected rows...					
All					
	State	Approver	Comments	Approval for	Created
	Search	Search	Search	Search	Search
<input type="checkbox"/>	Approved	alice p		(empty)	2024-10-22 22:26:19
<input type="checkbox"/>	Rejected	Fred Luddy		(empty)	2024-09-01 12:19:33
<input type="checkbox"/>	Requested	Fred Luddy		(empty)	2024-09-01 12:17:03
<input type="checkbox"/>	Requested	Fred Luddy		(empty)	2024-09-01 12:15:44
<input type="checkbox"/>	Requested	Howard Johnson		CHG0000096	2024-09-01 06:15:29
<input type="checkbox"/>	Requested	Ron Kettering		CHG0000096	2024-09-01 06:15:29
<input type="checkbox"/>	Requested	Luke Wilson		CHG0000096	2024-09-01 06:15:29
<input type="checkbox"/>	Requested	Christen Mitchell		CHG0000096	2024-09-01 06:15:29
<input type="checkbox"/>	Requested	Bernard Laboy		CHG0000096	2024-09-01 06:15:29
<input type="checkbox"/>	Requested	Howard Johnson		CHG0000095	2024-09-01 06:15:25
<input type="checkbox"/>	Requested	Ron Kettering		CHG0000095	2024-09-01 06:15:25
<input type="checkbox"/>	Requested	Luke Wilson		CHG0000095	2024-09-01 06:15:25
<input type="checkbox"/>	Requested	Christen Mitchell		CHG0000095	2024-09-01 06:15:25
<input type="checkbox"/>	Requested	Bernard Laboy		CHG0000095	2024-09-01 06:15:25

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.