

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

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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:

To establish a clear and efficient project management framework by defining distinct roles and responsibilities for the Project Manager and Team Member, implementing appropriate access controls, and introducing a structured workflow for task assignment and progress tracking to enhance accountability and reduce confusion throughout the project lifecycle.

Skills:

Users, Groups, Roles, Tables, Access Control List, Flow Designer

TASK INITIATION

Milestone 1 : Users

Activity 1: 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

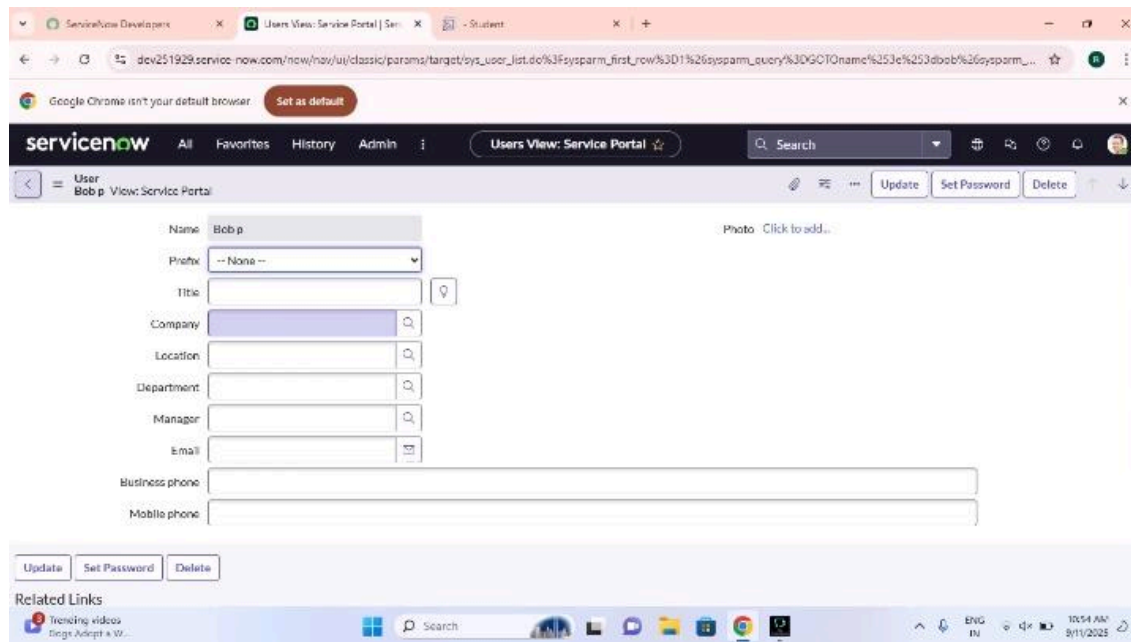
The screenshot shows the ServiceNow 'Users View: Service Portal' form. The browser address bar indicates the URL: `dev251929.service-now.com/new/ui/classic/params/target/sys_user_list.do%3Fsysparm_userpref_module%3Dc5a0ff0a0a0a7009a39da035ca39c%26sysparm_clear_sta...`. The form includes the following fields:

- Name:
- Prefix:
- Title:
- Company:
- Location:
- Department:
- Manager:
- Email:
- Business phone:
- Mobile phone:

Buttons at the bottom of the form include 'Update', 'Set Password', and 'Delete'. A 'Photo' field with a 'Click to add...' link is also present. The Windows taskbar at the bottom shows the time as 10:54 AM on 8/11/2025.

Create one more user:

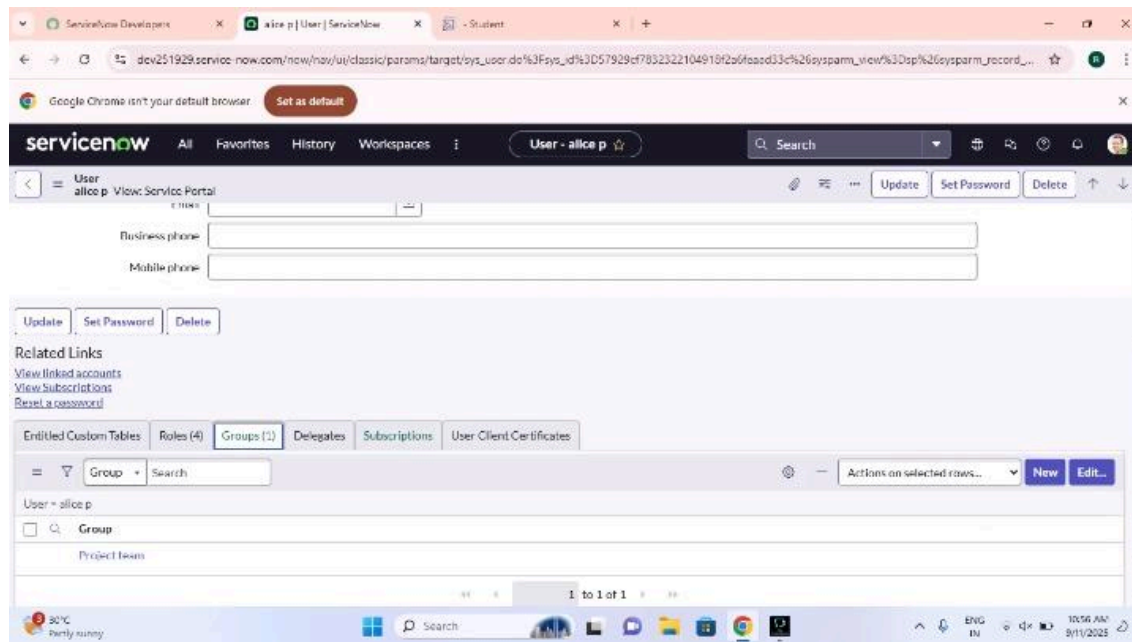
1. Create another user with the following details
2. Click on submit



Milestone 2 : Groups

Activity 1: 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 : Roles

Activity 1: 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 'Role - project manager' configuration page. The 'Name' field is 'project manager', 'Application' is 'Global', and 'Elevated privilege' is unchecked. The 'Description' field is empty. Below the form are 'Update' and 'Delete' buttons. The 'Related Links' section includes a 'Run Point Scan' link. The 'Contains Roles' tab is active, showing a search bar with 'for text' and a 'Search' button. Below the search bar, it says 'Role = project manager' and 'Contains'. The bottom of the page shows a Windows taskbar with the time 9:46 PM on 9/12/2025.

Create one more role:

7.Create another role with the following details

8.Click on submit

The screenshot shows the ServiceNow 'Role - team member' configuration page. The 'Name' field is 'team member', 'Application' is 'Global', and 'Elevated privilege' is unchecked. The 'Description' field is empty. Below the form are 'Update' and 'Delete' buttons. The 'Related Links' section includes a 'Run Point Scan' link. The 'Contains Roles' tab is active, showing a search bar with 'for text' and a 'Search' button. Below the search bar, it says 'Role = team member' and 'Contains'. The bottom of the page shows a Windows taskbar with the time 9:47 PM on 9/12/2025.

Milestone 4 : Table

Activity 1: 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

ServiceNow Developers

project table | Table | ServiceNow

dev251929.service-now.com/now/nav/ui/classic/params/target/sys_db_object.do%3Fsys_id%3Dedc3f0bf83a322104918f2a6fead3ae%26sysparm_record_target%3Dsys_db_o...

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servicenow All Favorites History Workspaces Table - project table Search

Table - project table Delete Update Delete All Records

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label project table Application Global

* Name u_project_table

Columns Controls Application Access

Table Columns Column label Search 1 to 13 of 13 New

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display	Create roles
Created	Date/Time	(empty)	40		false	
Created by	String	(empty)	40		false	
description	String	(empty)	40		false	

8. Click on submit

ServiceNow Developers

project table | Table | ServiceNow

dev251929.service-now.com/now/nav/ui/classic/params/target/sys_db_object.do%3Fsys_id%3D0cdc3f0bf83a322104918f2a6fead3dc%26sysparm_record_target%3Dsys_db_o...

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servicenow

All Favorites History Workspaces

Table - project table

Search

Table Columns Column label Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display	Create roles
Created	Date/Time	(empty)		40	false	
Created by	String	(empty)		40	false	
description	String	(empty)		40	false	
end date	Date	(empty)		40	false	
project id	Integer	(empty)		40	false	
project manager	String	(empty)		40	false	
project name	String	(empty)		40	false	
start date	Date	(empty)		40	false	
status	Choice	(empty)		40	false	
Sys ID	Sys ID (GUID)	(empty)		32	false	
Updated	Date/Time	(empty)		40	false	
Updated by	String	(empty)		40	false	
Updated	Integer	(empty)		40	false	

30°C Partly sunny

Search

ENG IN 10:58 AM 9/11/2025

Create one more table:

9. Create another table as: task table 2 and fill with following details.

10. Click on submit.

ServiceNow Developers

task table 2 | Table | ServiceNow

dev251929.service-now.com/now/nav/ui/classic/params/target/sys_db_object.do%3Fsys_id%3D160b78f783e322104918f2a6fead3d5%26sysparm_record_target%3Dsys...

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servicenow

All Favorites History Workspaces

Table - task table 2

Search

Table Columns Column label Search

Dictionary Entries

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label Application Global

* Name

Columns Controls Application Access

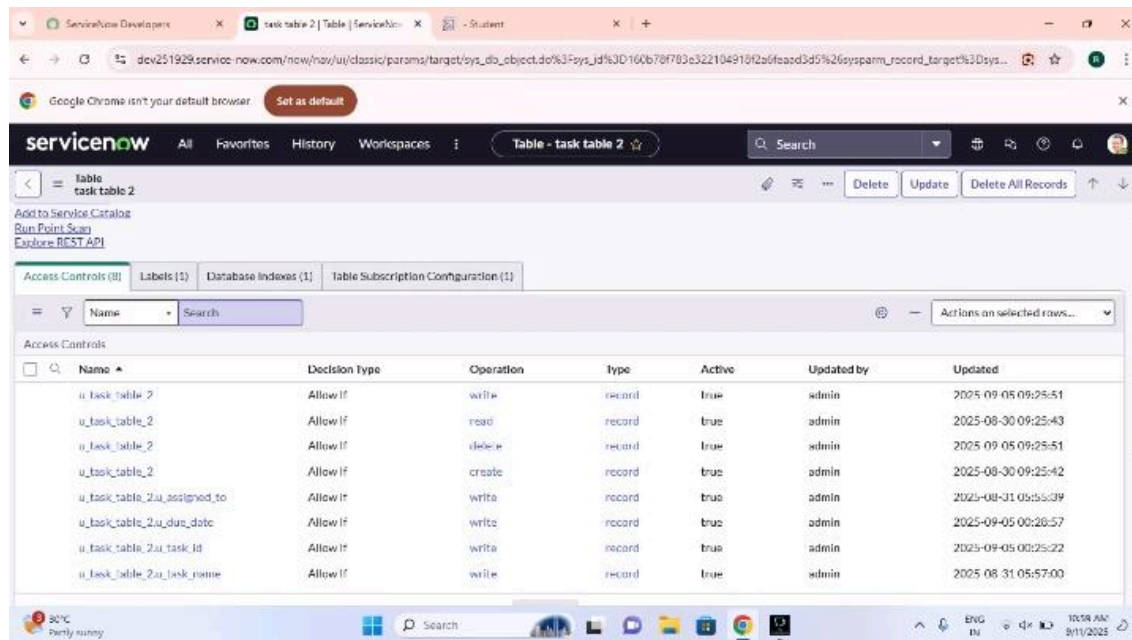
Table Columns Column label Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display	Create roles
assigned to	String	(empty)		40	bob	false
comments	String	(empty)		200	feedback	false
Created	Date/Time	(empty)		40		false

Search

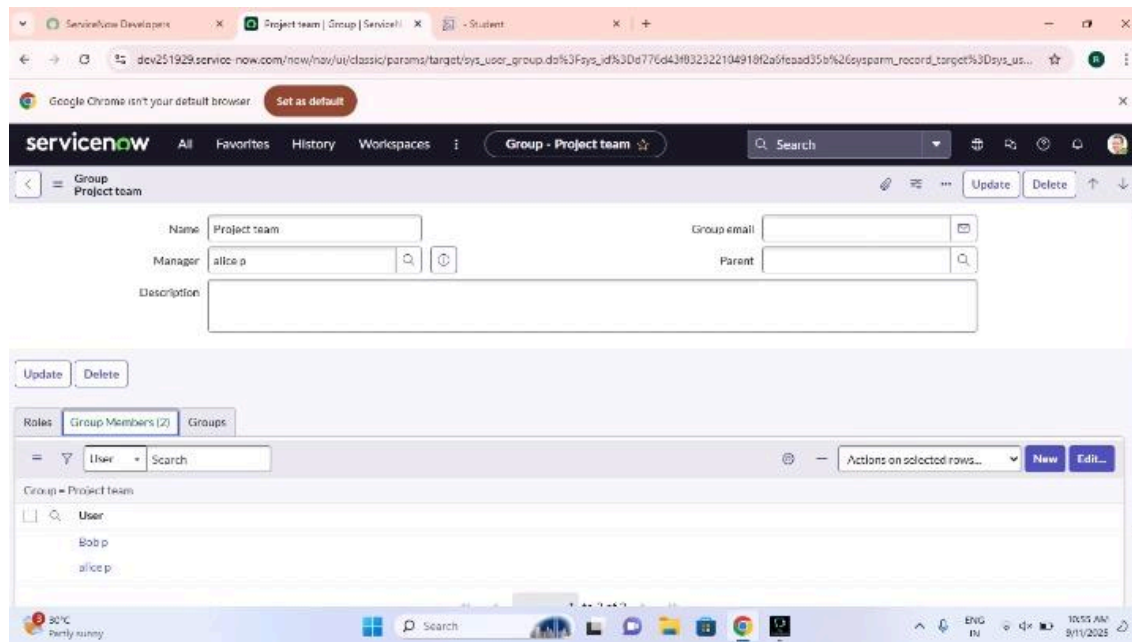
ENG IN 9:49 PM 9/12/2025



Milestone 5 : Assign users to groups

Activity 1: Assign users to project team group

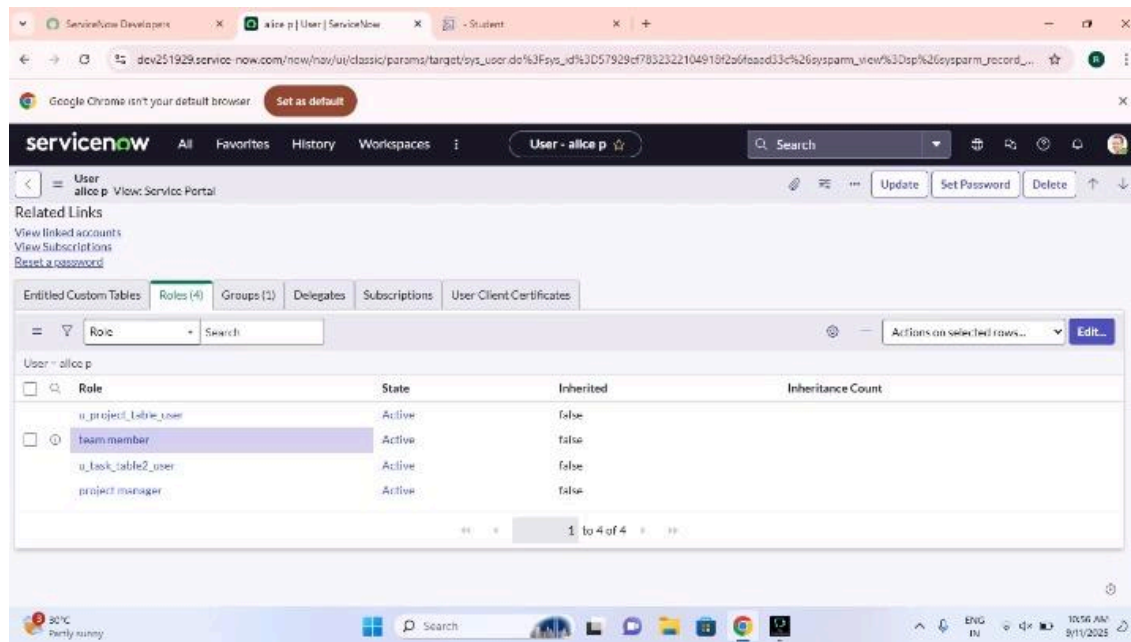
1. Open service now.
2. Click on All >> search for groups
3. Select tables under system definition
4. Select the project team group
5. Under group members
6. Click on edit
7. Select alice p and bob p and save



Milestone 6 : Assign roles to users

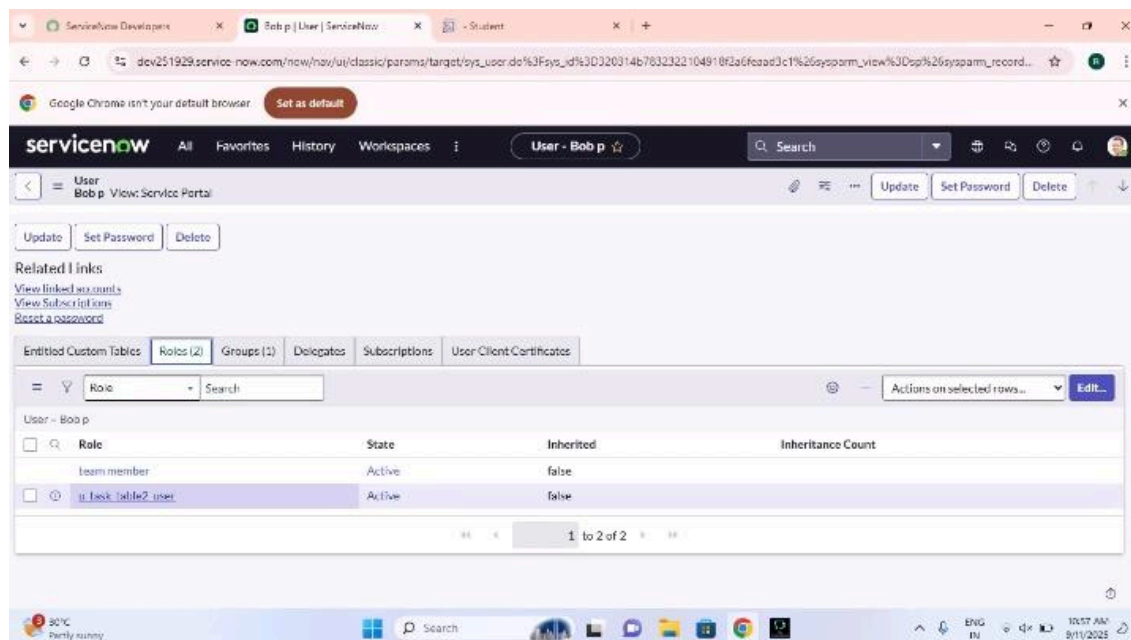
Activity 1: Assign roles to alice user

- 1.Open servicenow.Click on All >> search for user
- 2.Select users under system definition
- 3.select the alice p user
- 4.select roles
- 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.



Activity 2: Assign roles to bob user

1. Open service now Click on All >> search for user
2. Select users under system definition
3. Select the bob p user
4. select roles
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 7 : Application access

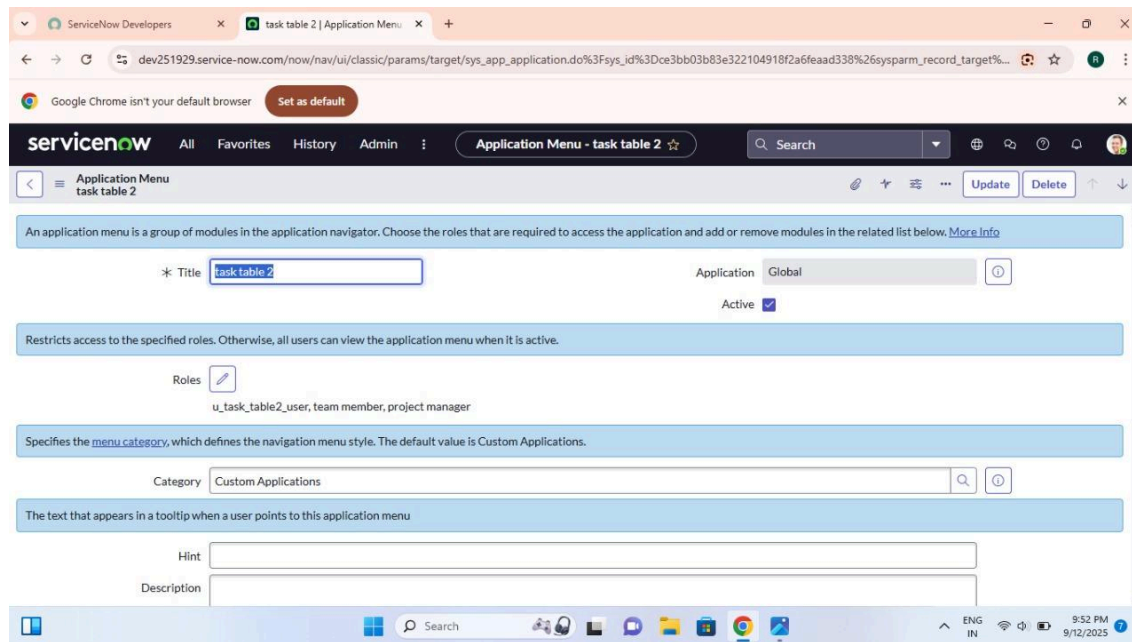
Activity 1: Assign table access to application

1. while creating a table it automatically create a application and module for that table
2. Go to application navigator search for search application menu
3. Search project table application
4. Click on edit module
5. Give project member roles to that application
6. Search for task table2 and click on edit application.
7. Give the project member and team member role for task table 2 application

The screenshot shows the ServiceNow web interface for configuring an application menu. The browser address bar shows a URL from dev251929.service-now.com. The page title is 'Application Menu - project table'. The configuration form includes the following fields and sections:

- Title:** project table
- Application:** Global
- Active:** ☒
- Roles:** project manager
- Category:** Custom Applications
- Hint:** (empty text box)
- Description:** (empty text box)

Informational text boxes provide context: '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](#)' and 'Specifies the menu category, which defines the navigation menu style. The default value is Custom Applications.'



Milestone 8 :Access control list

Activity 1: 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

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]

task id

Description:

Applies To: No. of records matching the condition: 6

Add Filter Condition Add "OR" Clause

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

6. Fill the following details to create a new ACL
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 5 acl for the following fields
12. status & comments acl for team member role
13. Other 4 for project manager

ServiceNow Developers | Access Controls | ServiceNow

dev251929.service-now.com/now/nav/ui/classic/params/target/sys_security_acl_list.do%3Fsysparm_first_row%3D1%26sysparm_query%3DGOTOname%253E%253Du_task...

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servicenow All Favorites History Workspaces Access Controls Search

Access Controls Name Search Actions on selected rows... New

All > Name >= u_task

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_task_table_2	Allow If	write	record	true	admin	2025-09-05 09:25:51
u_task_table_2	Allow If	read	record	true	admin	2025-08-30 09:25:43
u_task_table_2	Allow If	delete	record	true	admin	2025-09-05 09:25:51
u_task_table_2	Allow If	create	record	true	admin	2025-08-30 09:25:42
u_task_table_2.u_assigned_to	Allow If	write	record	true	admin	2025-08-31 05:55:39
u_task_table_2.u_comments	Allow If	write	record	true	admin	2025-09-11 08:40:12
u_task_table_2.u_due_date	Allow If	write	record	true	admin	2025-09-05 00:28:57
u_task_table_2.u_status	Allow If	write	record	true	admin	2025-09-11 08:38:24
u_task_table_2.u_task_id	Allow If	write	record	true	admin	2025-09-05 00:25:22
u_task_table_2.u_task_name	Allow If	write	record	true	admin	2025-08-31 05:57:00
VA Channel Integration ACL	Allow If	execute	REST_Endpoint	true	admin	2023-04-05 00:28:13

1 to 20 of 636

ENG IN 9:54 PM 9/12/2025

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

ServiceNow Developers | Create Created | task table 2

dev251929.service-now.com/now/nav/ui/classic/params/target/u_task_table_2.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Du_task_table_2%26sysparm_c...

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servicenow All Favorites History task table 2 - Create Created

task table 2 New record Submit

task id due date

task name status In progress

assigned to bob

comments feedback

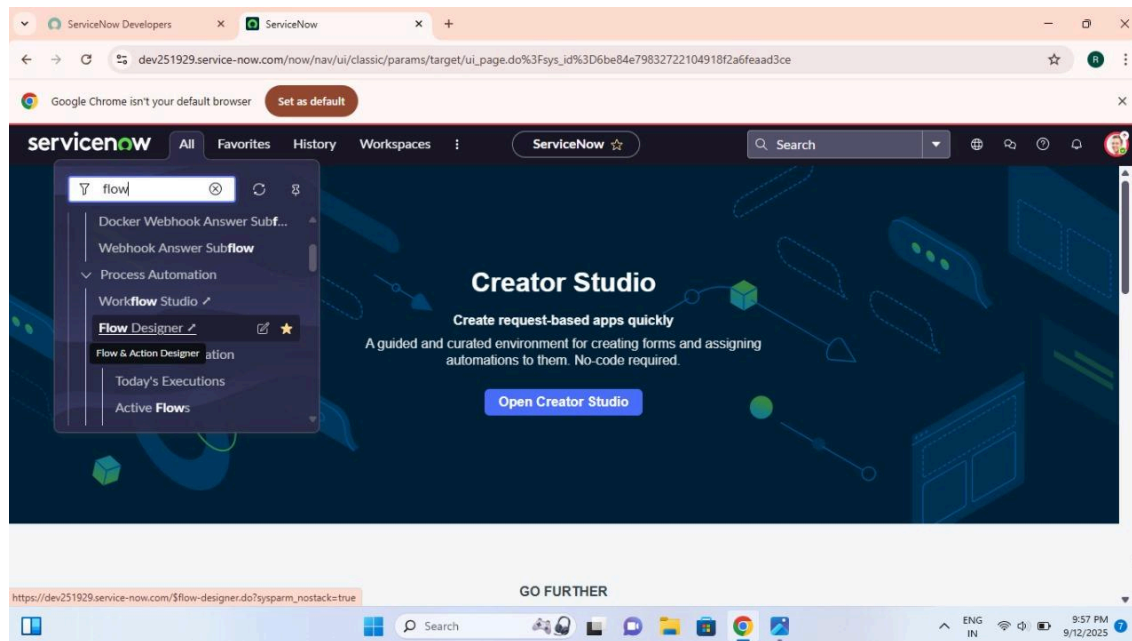
Submit

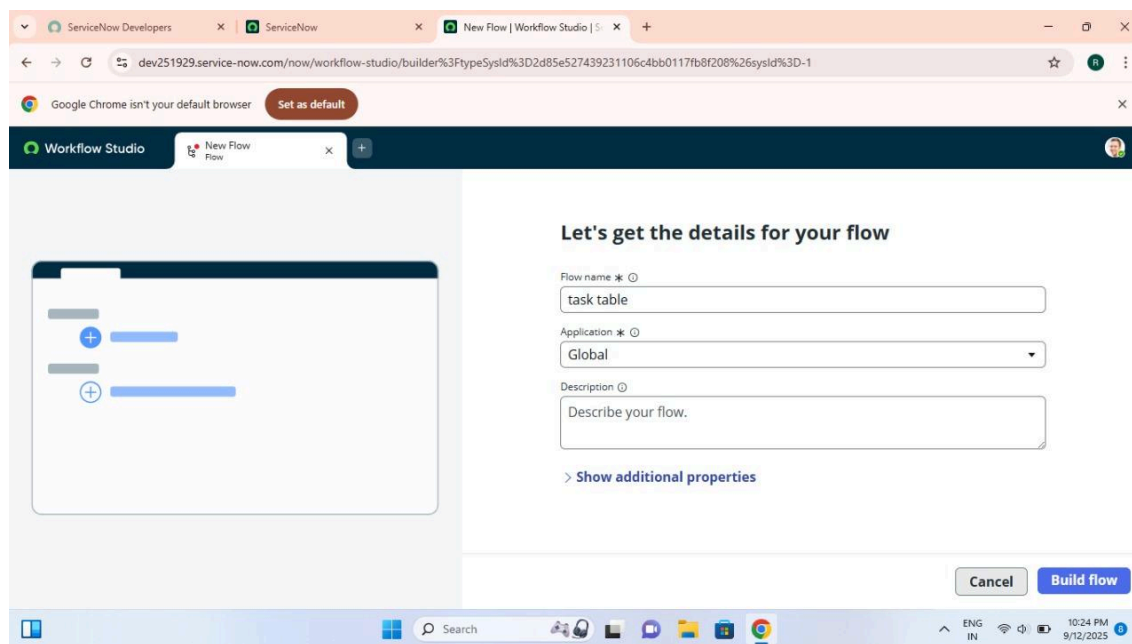
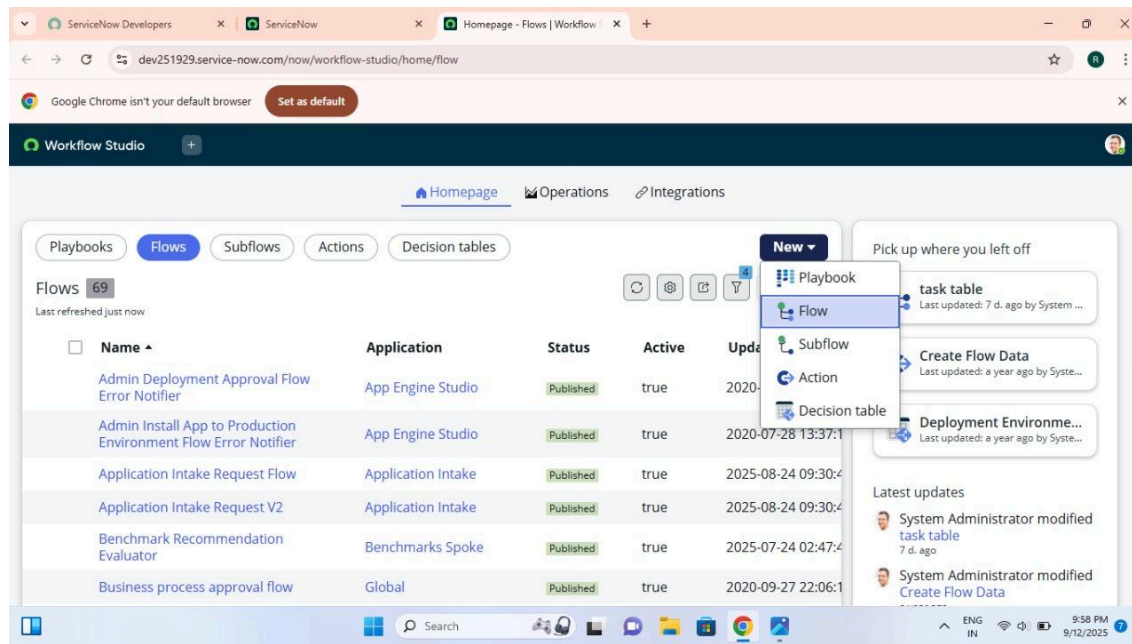
ENG IN 9:56 PM 9/12/2025

Milestone 9: Flow

Activity 1: 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.

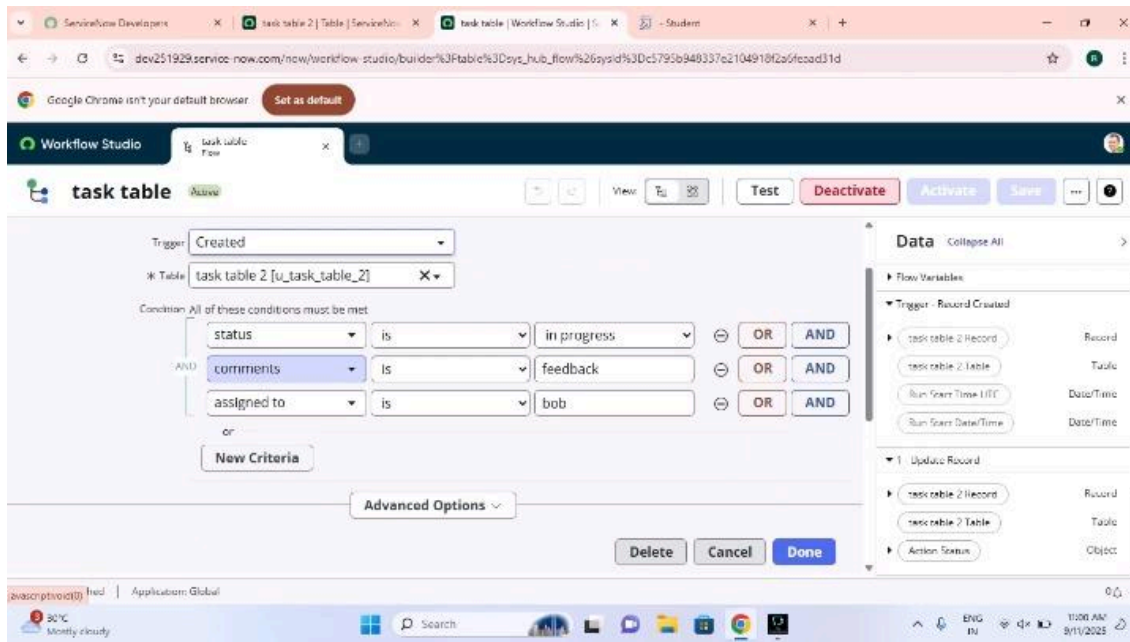




next step:

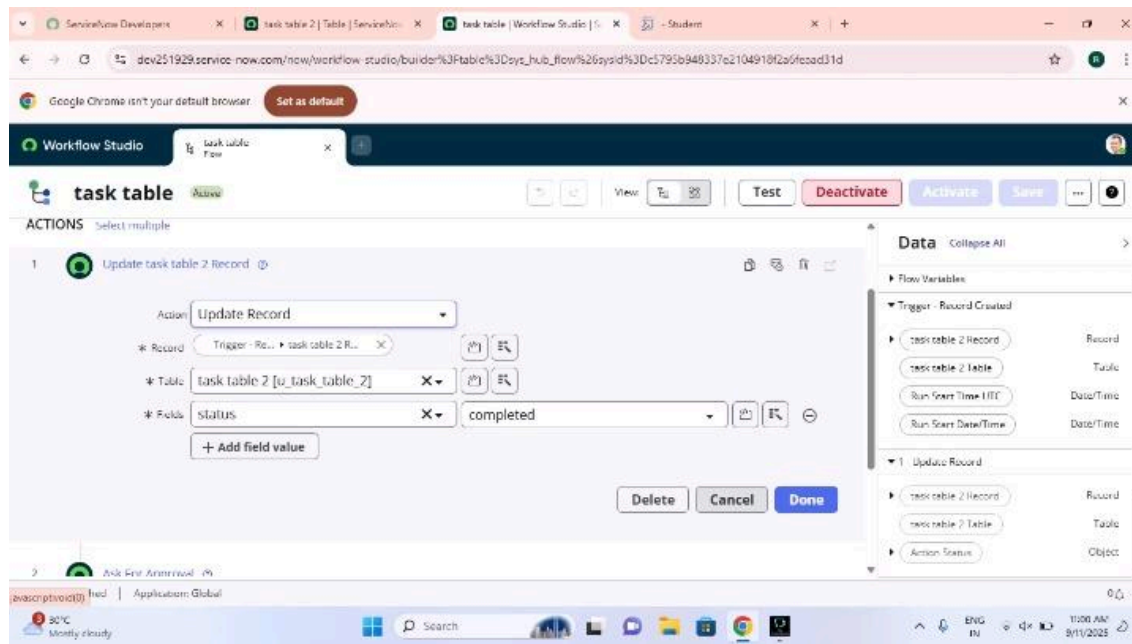
1. Click on Add a trigger
2. Select the trigger in that Search for "create record" and select that.

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.



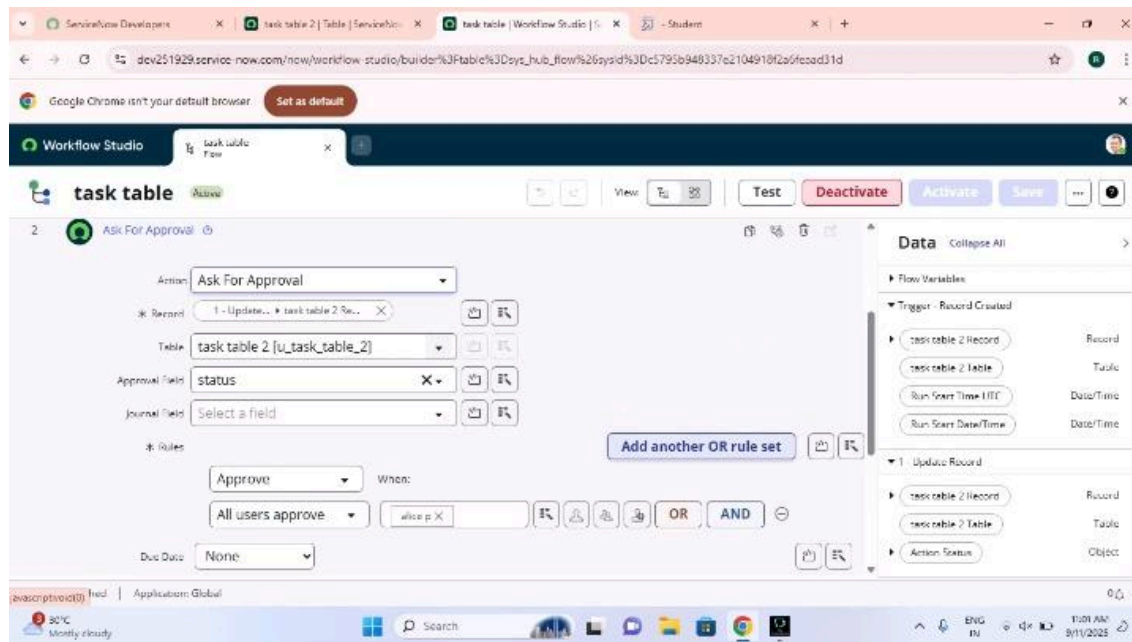
Next step:

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.



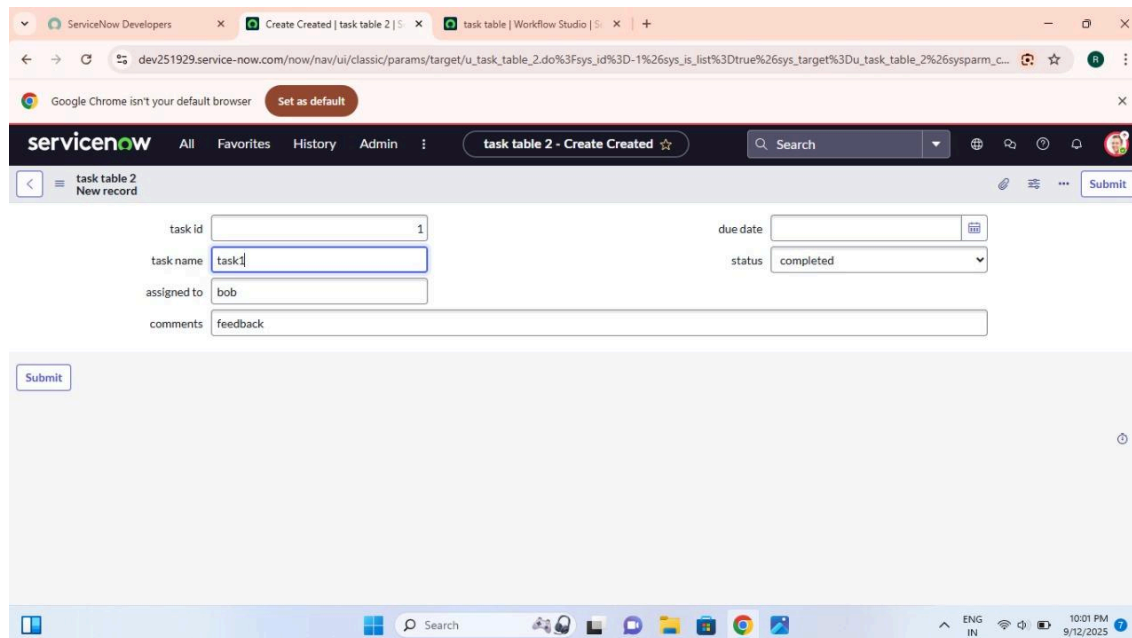
Next step:

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



11.Go to application navigator and search for my approval

12.Click on my approval under the service desk.

13.select all

14. Alice p got approval request then right click on requested then select approved

	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2025-09-01 22:24:39
No Longer Required	alice p		(empty)	2025-09-01 11:06:58
No Longer Required	alice p		(empty)	2025-09-01 11:03:04
Approved	alice p		(empty)	2025-09-05 01:13:12
No Longer Required	alice p		(empty)	2025-09-01 23:14:47
Requested	alice p		(empty)	2025-09-12 09:25:45
No Longer Required	alice p		(empty)	2025-09-04 23:58:40
Approved	alice p		(empty)	2025-09-04 23:59:10
Approved	alice p		(empty)	2025-09-05 01:19:27
No Longer Required	alice p		(empty)	2025-09-04 23:57:20
Approved	alice p		(empty)	2025-09-04 23:59:10
No Longer Required	alice p		(empty)	2025-09-01 22:47:09

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.