

# 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:

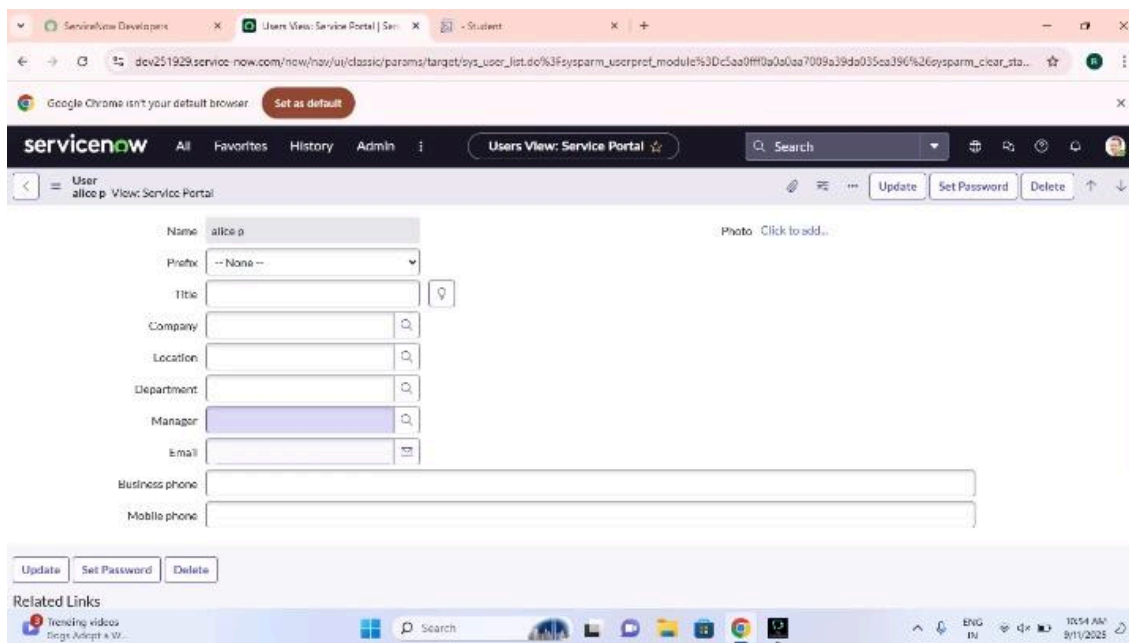
Users, Groups, Roles, Tables, Access Control List, Flow Designer

# 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



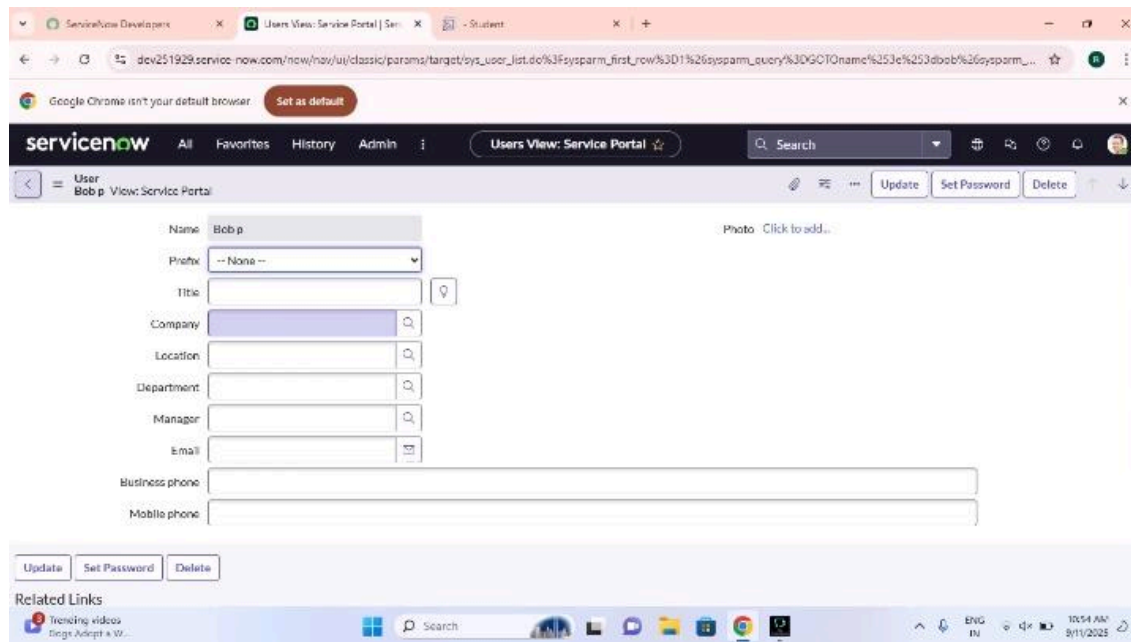
The screenshot shows the ServiceNow 'Users View: Service Portal' form. The form is for creating a new user named 'alice p'. The fields are as follows:

- Name: alice p
- Prefix: -- None --
- Title: (empty)
- Company: (empty)
- Location: (empty)
- Department: (empty)
- Manager: (empty)
- Email: (empty)
- Business phone: (empty)
- Mobile phone: (empty)

At the bottom of the form, there are buttons for 'Update', 'Set Password', and 'Delete'. Below the form, there is a 'Related Links' section with a link to 'Trending videos'.

#### Create one more user:

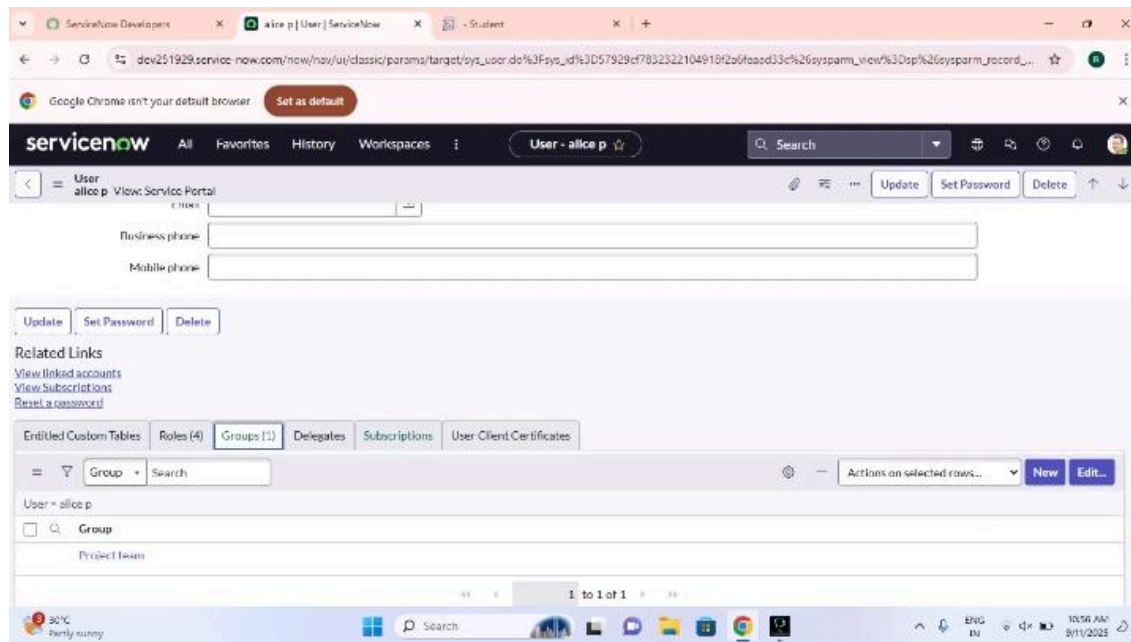
1. Create another user with the following details
2. Click on submit



## Milestone 2 : Groups

### Activity 1: Create Groups

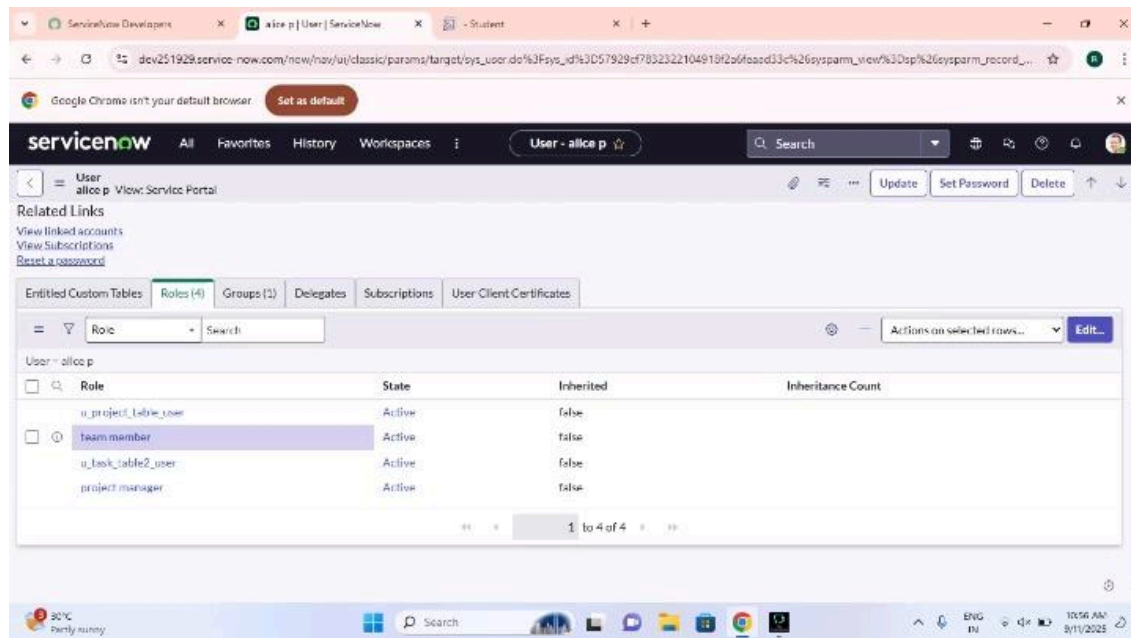
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



## Milestone 3 : Roles

### Activity 1: Create roles

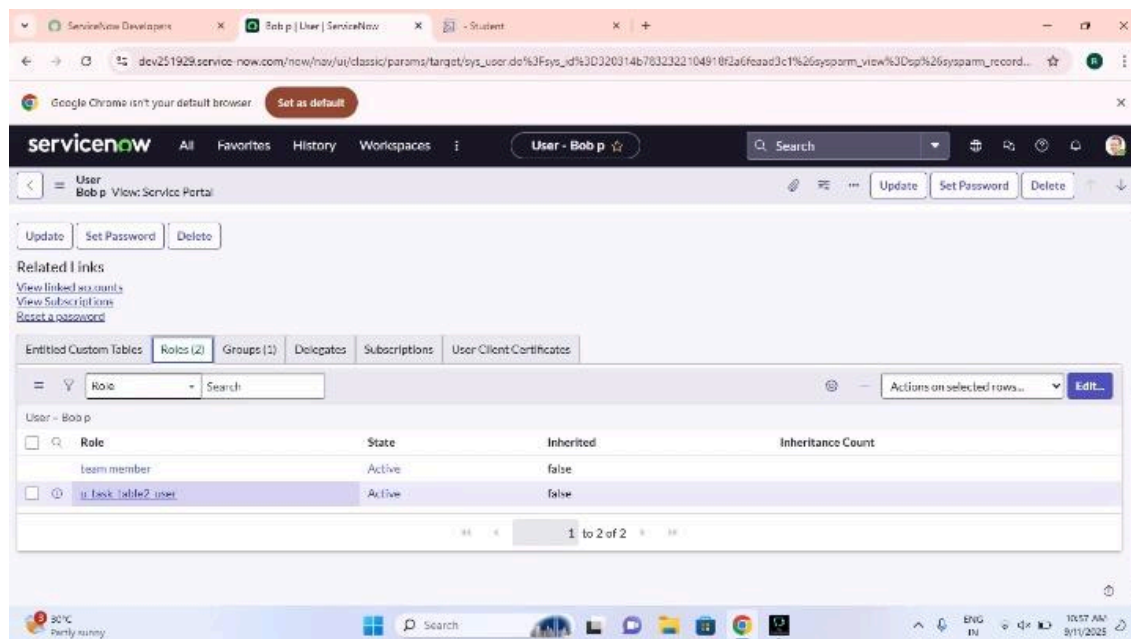
1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role
6. Click on submit



**Create one more role:**

7. Create another role with the following details

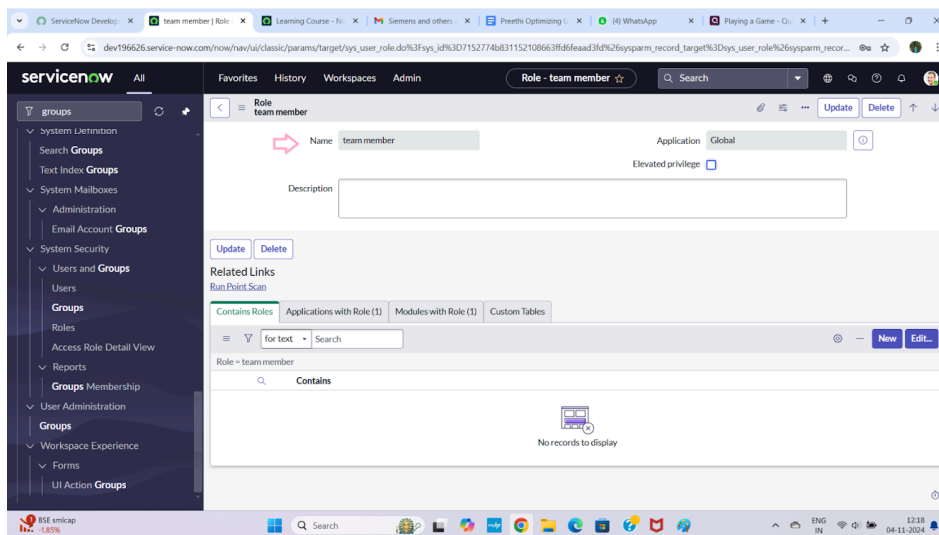
8. Click on submit



## 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



8. Click on submit

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	

## Create one more table:

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

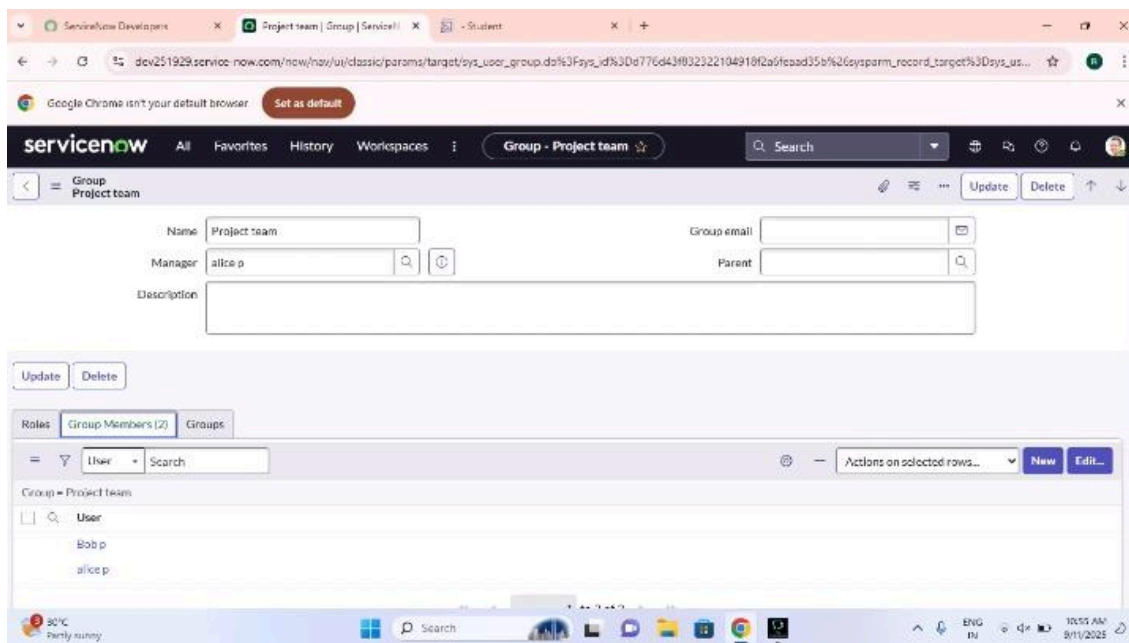
10. Click on submit.

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_due_date	Allow If	write	record	true	admin	2025-09-05 00:26:57
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

## 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

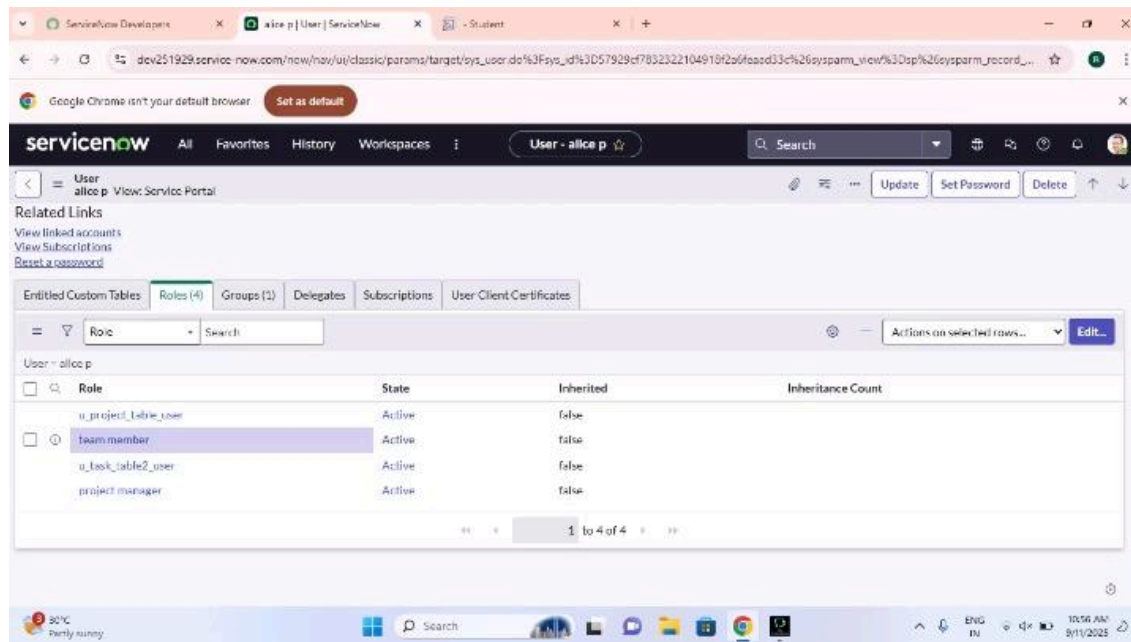


## Milestone 6 : Assign roles to users

### Activity 1: Assign roles to alice user

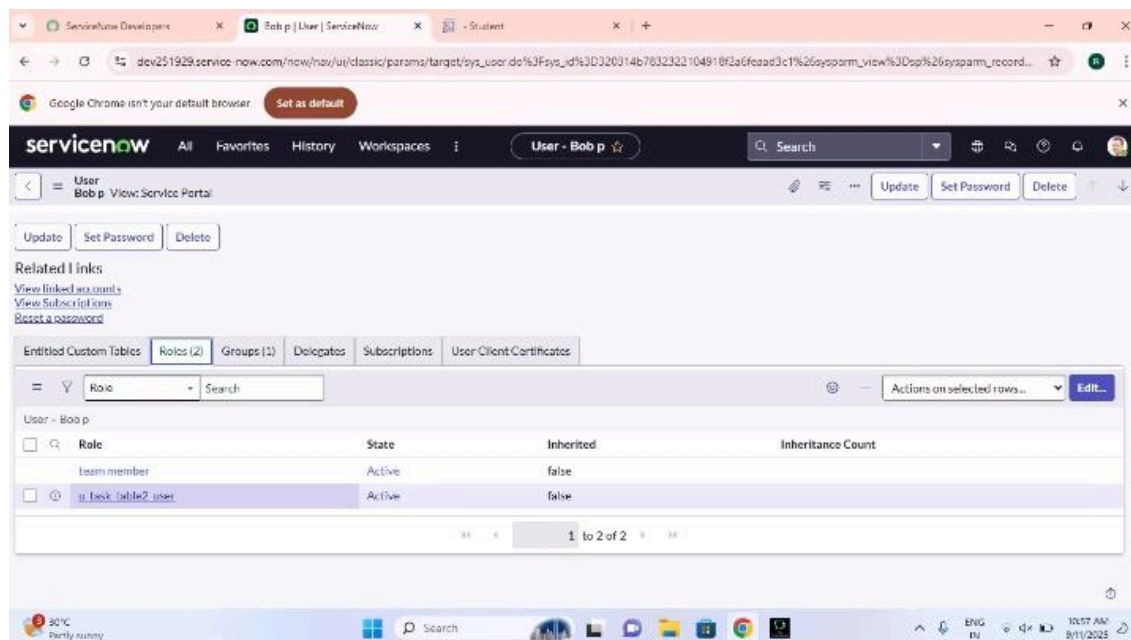
1. Open servicenow. Click on All >> search for user
2. Select tables under system definition
3. Select the project manager user
4. Under project manager
5. Click on edit
6. Select project member and save
7. click on edit add u\_project\_table role and u\_task\_table role
8. click on save and update the form.





## Activity 2: Assign roles to bob user

1. Open service now 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 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 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 web interface for configuring an application menu. The browser tabs include 'Copy of template - Google Doc...', 'project on users.groups.roles.t...', 'ServiceNow Developers', and 'project table | Application Men...'. The URL is 'dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_app\_application.do%3Fsys\_id%3D9705334f831152108663ffd6fead362'. The page title is 'Application Menu - project table'. The main content area has a light blue header with the text: '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](#)'. Below this, there are several form fields: 'Title' (project table), 'Application' (Global), 'Active' (checked), 'Roles' (project member), 'Category' (Custom Applications), 'Hint', and 'Description'. At the bottom, there are 'Update' and 'Delete' buttons. An 'Activate Windows' watermark is visible in the bottom right corner.

servicenow All Favorites History Admin Application Menu - project table Search

Application Menu  
project table

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](#)

\* Title  Application

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.

Category

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

Hint

Description

Update Delete

Activate Windows  
Go to Settings to activate Windows.

Copy of template - Google | ServiceNow Developers | project table | Application M | task table 2 | Application M | ChatGPT

dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_app\_application.do%3Fsys\_id%3D114bece3835992108663ffd6feaad3dc

serviceNow All Favorites History Admin Application Menu - task table 2 Search

Application Menu task table 2 Application: Unknown Update Delete

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.

Category Custom Applications

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

Hint

Description

Update Delete

Activate Windows Go to Settings to activate Windows. Actions on selected rows... New

## 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

dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_security\_acl.do%3Fsys\_id%3D-1%26sys\_is\_list%3Dtrue%26sys\_target%3Dsys\_security\_acl%26sysparm\_che...

serviceNow All Favorites History Admin : Access Control - New Record Search

Access Control New record Submit

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 -- fields

\* 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

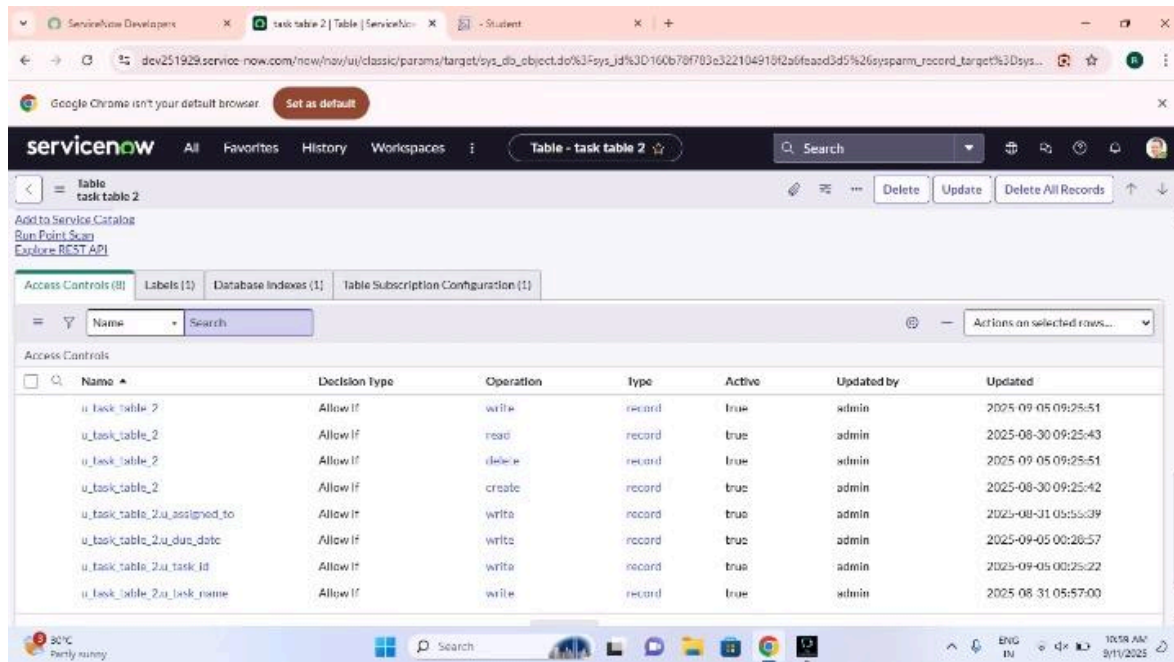
-- choose field -- -- oper -- -- value --

Conditions

Activate Windows Go to Settings to activate Windows.

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

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 4 acl for the following fields



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

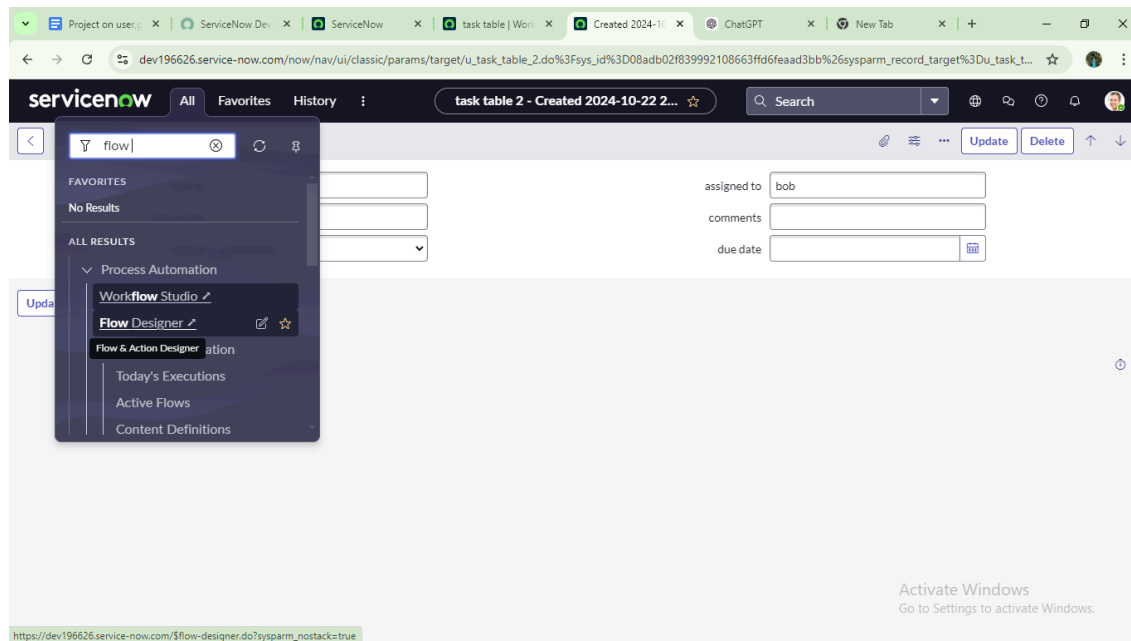
comments

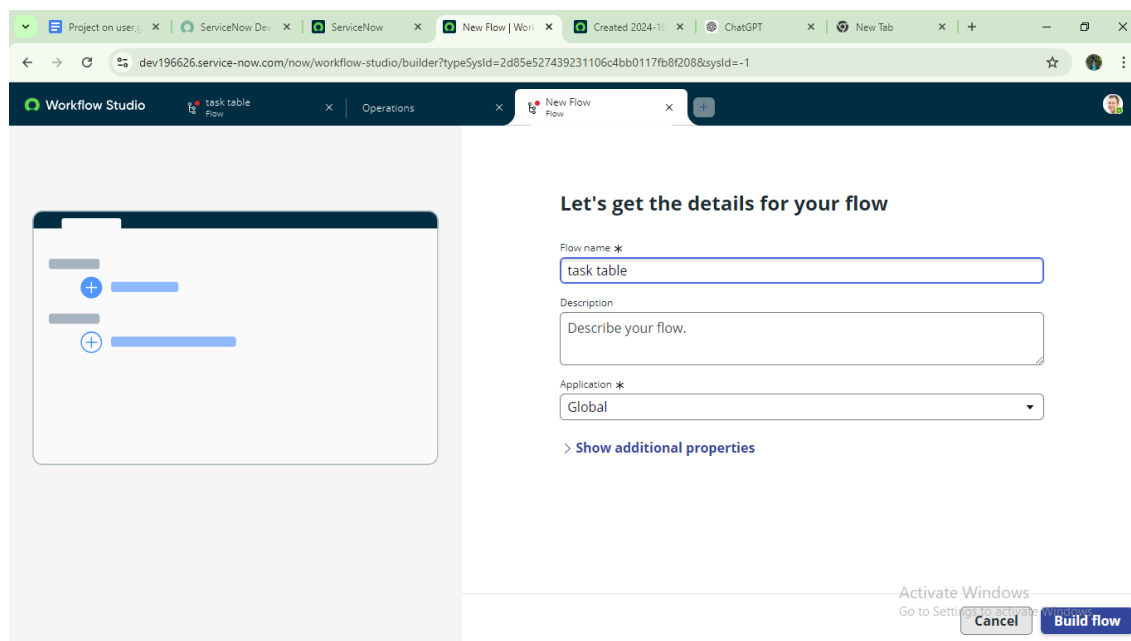
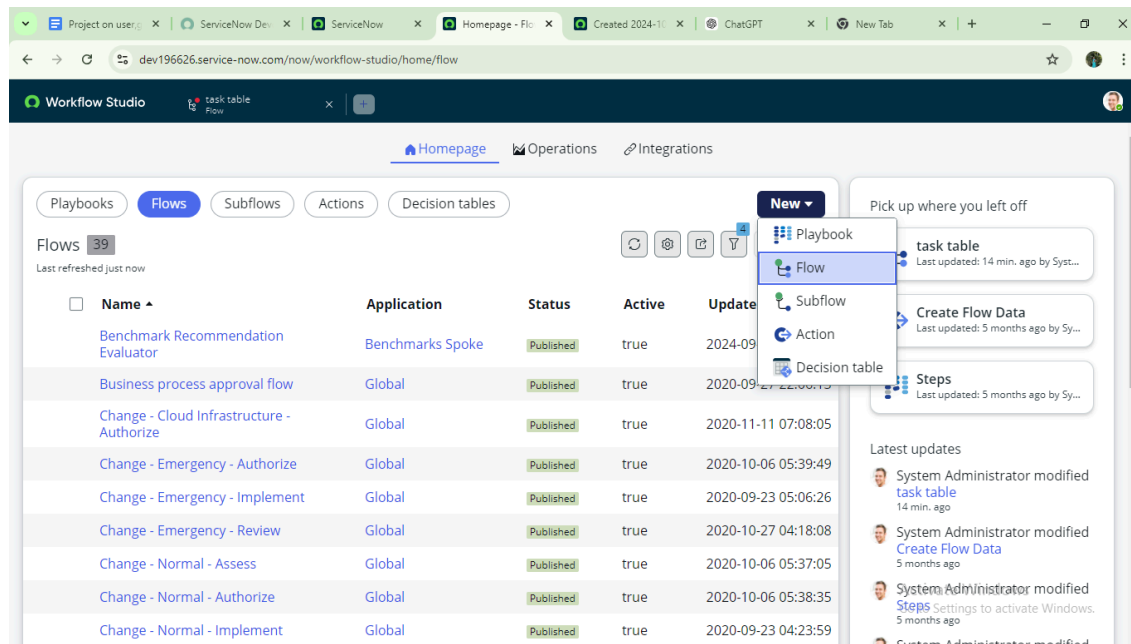
due date

## 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.

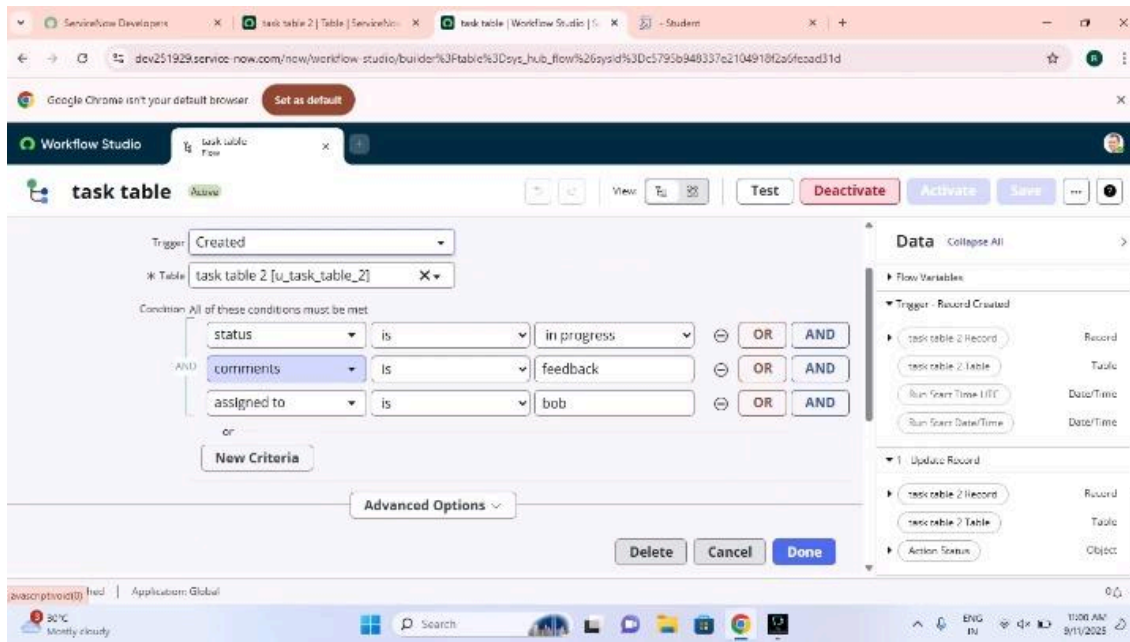




### next step:

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

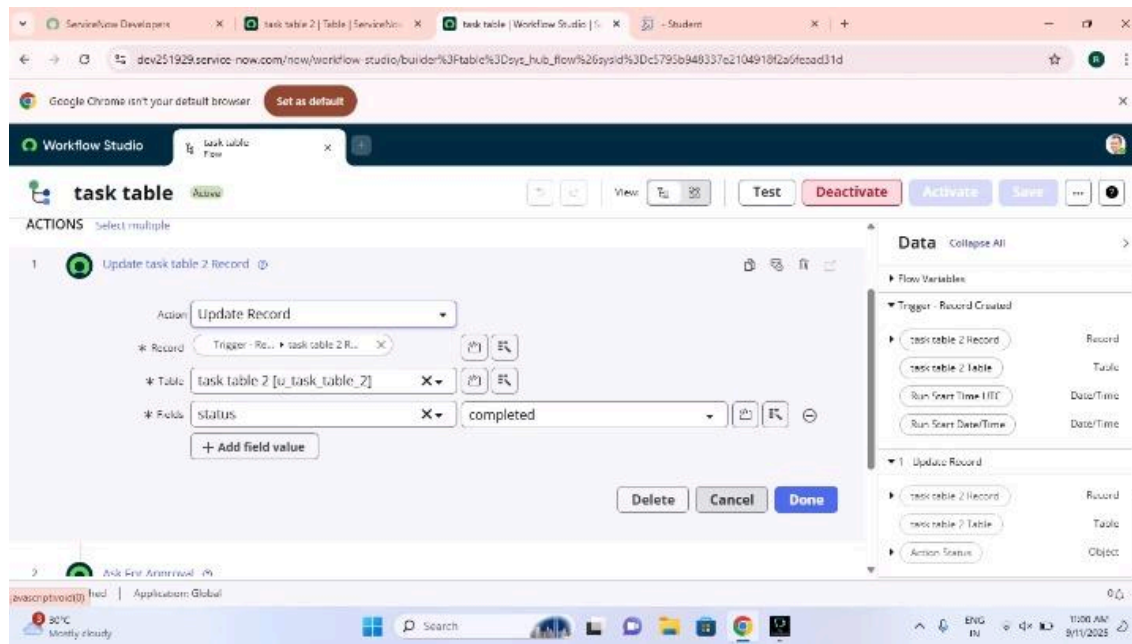
3. Give the table name as “ task table ”.
4. Give the Condition as Field : status Operator :is Value : in progress  
Field : comments Operator :is Value : feedback  
Field : assigned to Operator :is Value : bob
5. After that click on Done.



### Next step:

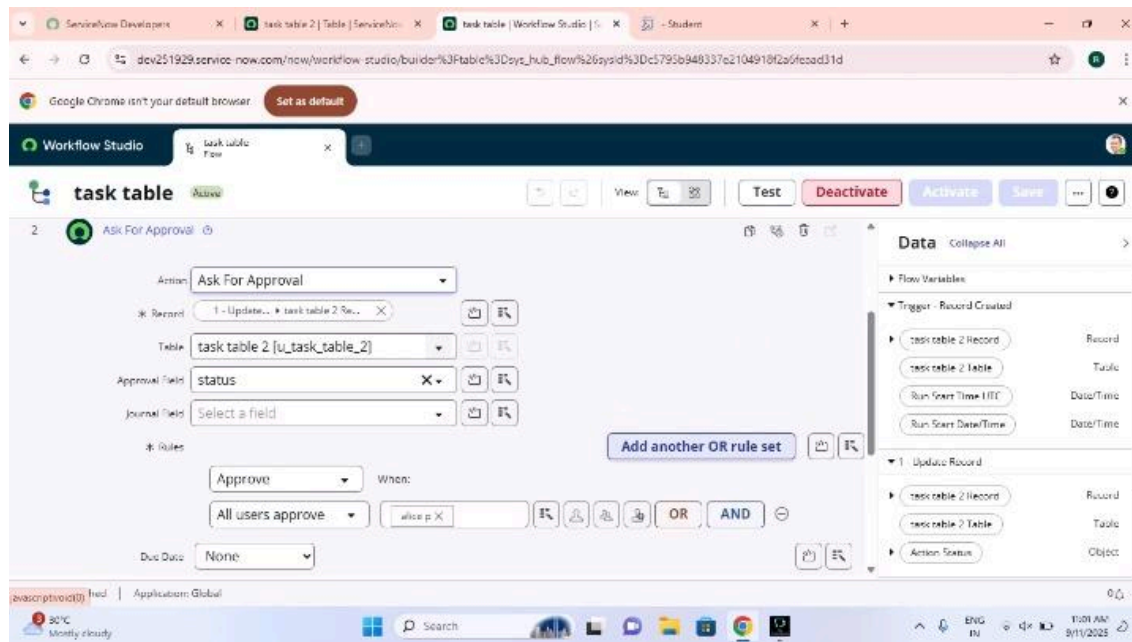
1. Click on Add an action.
2. Select action in that ,search for “ update records”.
3. In Record field drag the fields from the data navigation from Right Side(Data pill)
4. Table will be auto assigned after that
5. Add fields as “status” and value as “completed”
6. Click on Done.





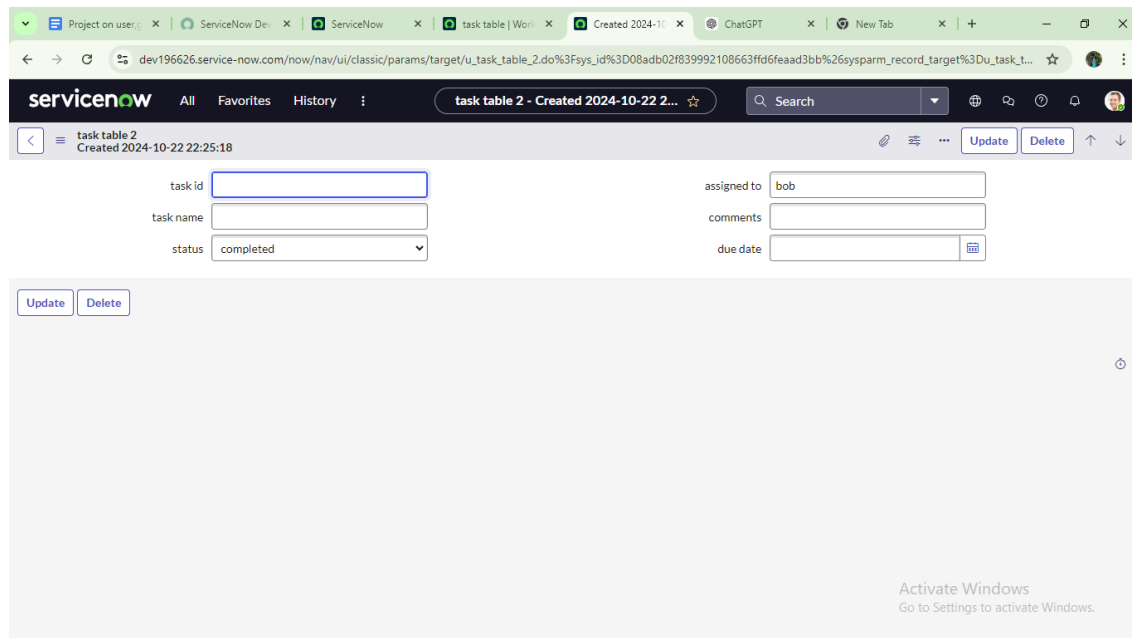
### Next step:

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

State	Approver	Comments	Approval for	Created
Approved	empty		empty	2025-09-05 01:07:27
Approved	empty		empty	2025-09-05 01:06:19
Approved	empty		empty	2025-09-05 01:06:41
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 23:14:17
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

## 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.