

# EDUCATIONAL ORGANIZATION USING SERVICE NOW

**Team Id:** NM2025TMID19179

**Team Members:** 4

**Team Leader:** SONIYA M

**Team Member 1:** SUNITHA S

**Team Member 2:** SANTHIYA P

**Team Member 3:** HEMAVATHY R

**Problem Statement:**

The educational organization's current manual process for generating and filling PDF documents is inefficient and error-prone, negatively impacting administrative staff productivity and the timely delivery of services.

**Objective:**

To automate and streamline the process of filling out PDF forms for an educational organization using ServiceNow, improving operational efficiency, reducing manual errors, and enhancing the overall experience for students, faculty, and administrators.

**Skills:**

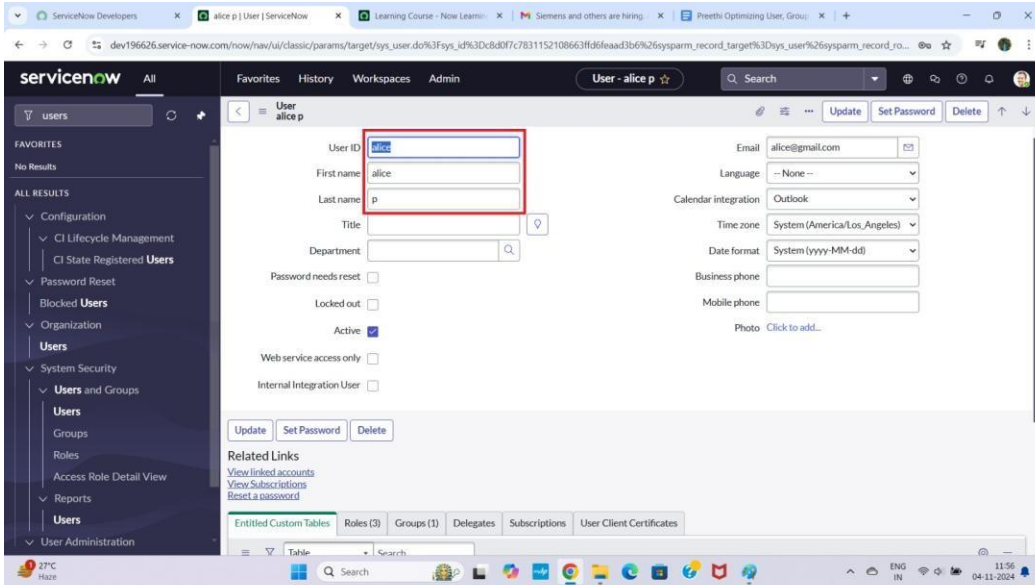
1. ServiceNow Platform Knowledge
2. Workflow Automation
3. Service Catalog Management
4. Access Control & Role Management
5. Report and Dashboard Creation

## **TASK INITIATION**

### **Milestone 1 : Users**

#### **Activity 1: Create Users**

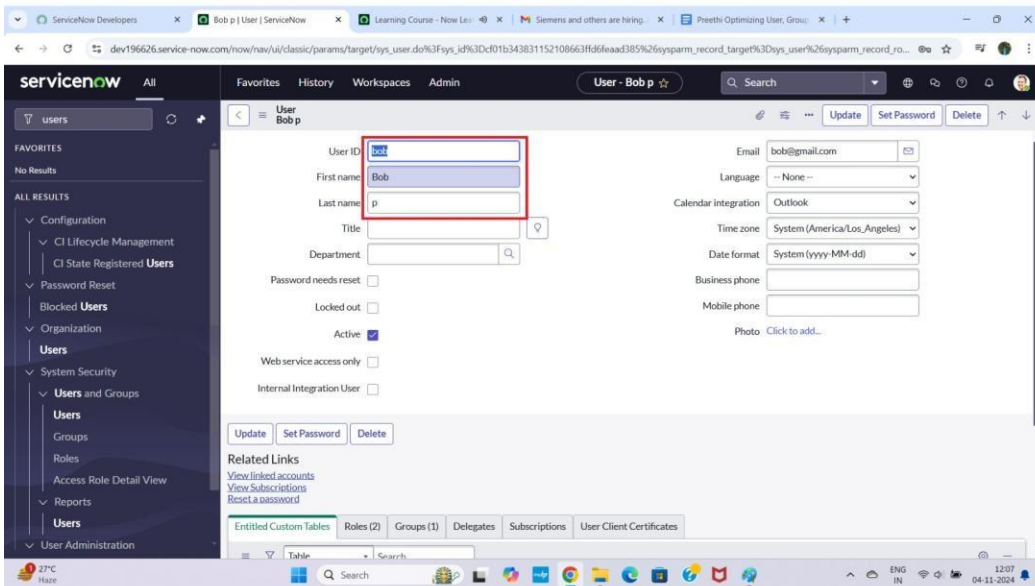
1. Open service now
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user
6. Click on submit



The screenshot shows the ServiceNow User Administration interface. The left sidebar contains a navigation menu with options like Configuration, CI Lifecycle Management, Password Reset, Blocked Users, Organization, Users, System Security, Users and Groups, Groups, Roles, Access Role Detail View, Reports, and User Administration. The main content area displays the details for user 'alice p'. The User ID field is highlighted with a red box. The form includes fields for First name (alice), Last name (p), Title, Department, Password needs reset, Locked out, Active (checked), Web service access only, Internal Integration User, 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 buttons for Update, Set Password, and Delete. Below the form, there are links for View linked accounts, View Subscriptions, and Reset a password. At the bottom, there are tabs for Entitled Custom Tables, Roles (3), Groups (1), Delegates, Subscriptions, and User Client Certificates.

## Create one more user:

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

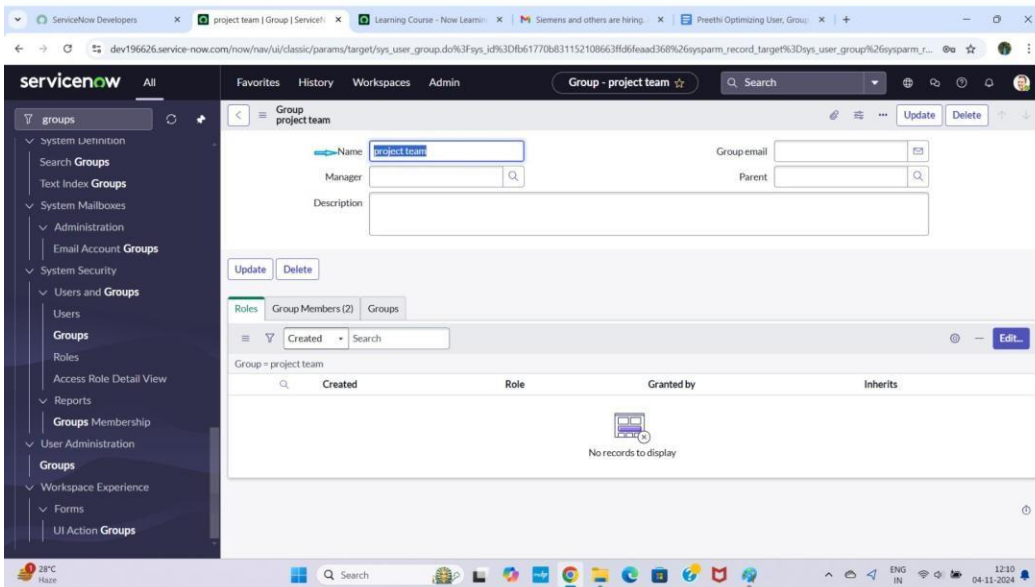


The screenshot shows the ServiceNow User Administration interface for user 'Bob p'. The left sidebar is the same as the previous screenshot. The main content area displays the details for user 'Bob p'. The User ID field is highlighted with a red box. The form includes fields for First name (Bob), Last name (p), Title, Department, Password needs reset, Locked out, Active (checked), Web service access only, Internal Integration User, Email (bob@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 buttons for Update, Set Password, and Delete. Below the form, there are links for View linked accounts, View Subscriptions, and Reset a password. At the bottom, there are tabs for Entitled Custom Tables, Roles (2), Groups (1), Delegates, Subscriptions, and User Client Certificates.

## 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



The screenshot shows the ServiceNow interface for creating a new group. The left sidebar contains the navigation menu with 'Groups' selected under 'System Security'. The main form is titled 'Group - project team' and includes the following fields:

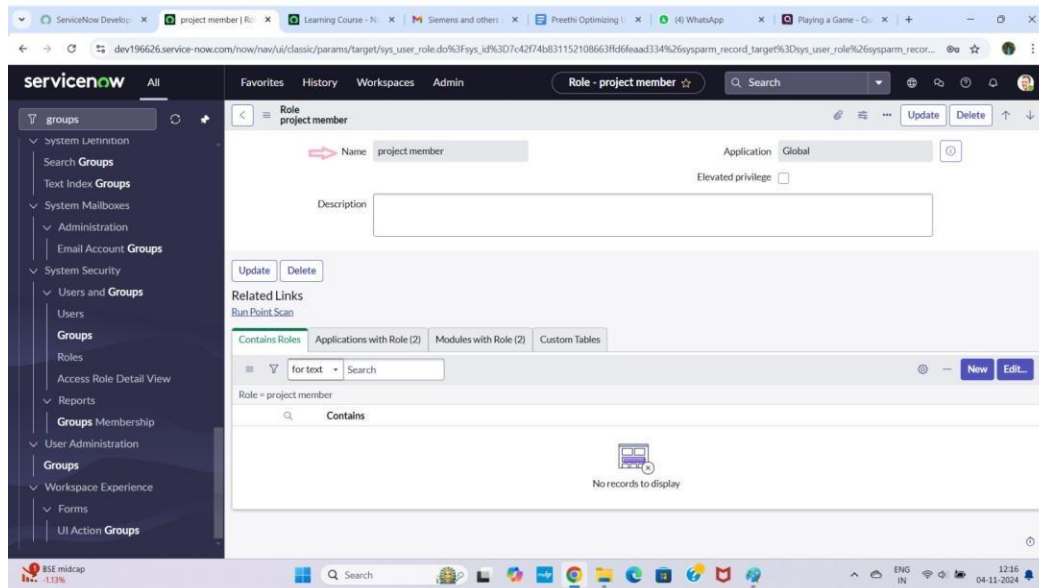
- Name:** project team
- Group email:** (empty)
- Manager:** (empty)
- Parent:** (empty)
- Description:** (empty)

Below the form, there is a section for 'Roles' with a table showing 'Group Members (2)'. The table has columns: Created, Role, Granted by, and Inherits. The table is currently empty, displaying 'No records to display'.

## 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

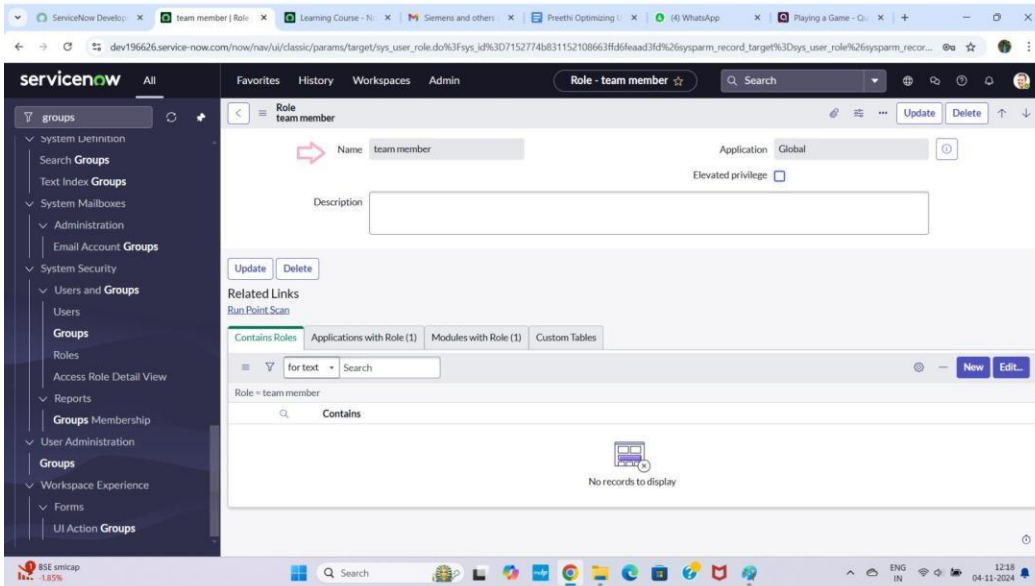


### Create one more role:

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

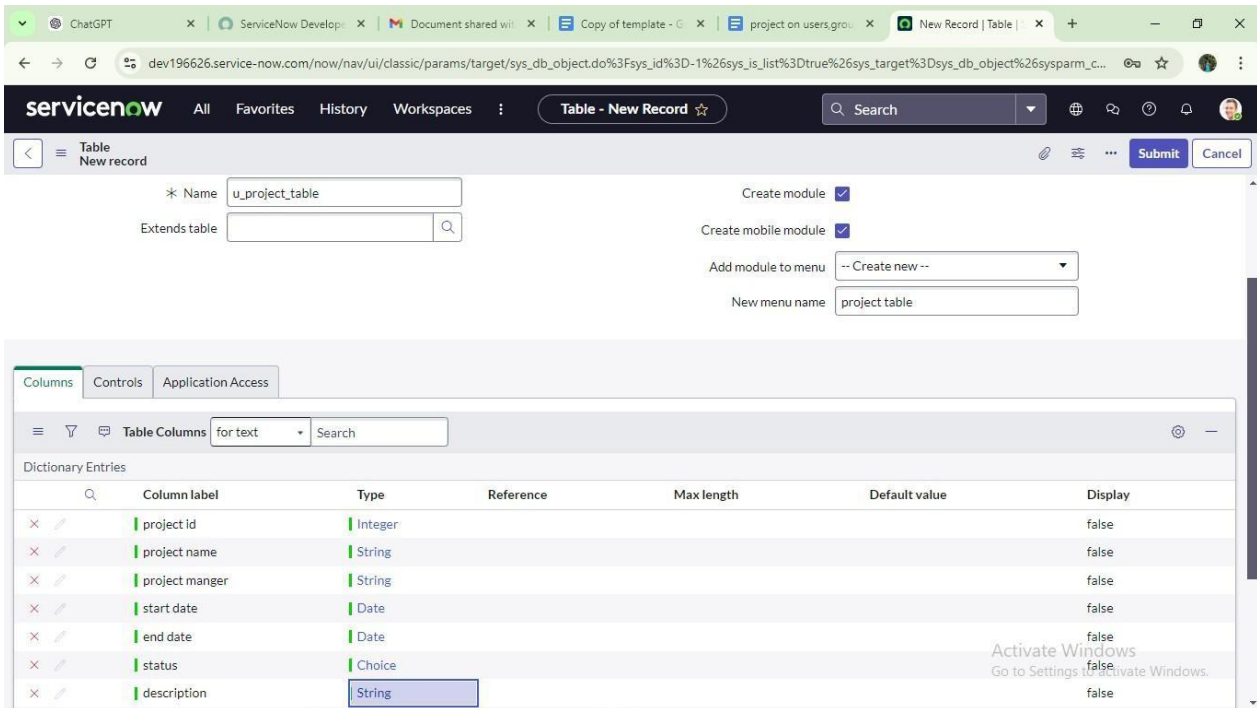
## Milestone 4 : Table Activity 1: Create Table

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



The screenshot shows the ServiceNow interface for configuring a role named 'team member'. The left sidebar contains a navigation menu with categories like System Administration, System Security, and User Administration. The main content area shows the role configuration form with fields for Name, Application, Description, and Elevated privilege. Below the form are 'Update' and 'Delete' buttons. A 'Related Links' section includes a 'Run Point Scan' link. A 'Contains Roles' table is visible, showing 'Role - team member' with a search bar and 'New' and 'Edit...' buttons. The table currently displays 'No records to display'.

8. Click on submit



The screenshot shows the ServiceNow interface for creating a new table named 'u\_project\_table'. The top section includes fields for Name, Extends table, Create module, Create mobile module, Add module to menu, and New menu name. The 'Columns' tab is selected, showing a list of dictionary entries for the table. The entries include project id, project name, project manger, start date, end date, status, and description, each with a type, reference, max length, default value, and display status.

Column label	Type	Reference	Max length	Default value	Display
project id	Integer			false	false
project name	String			false	false
project manger	String			false	false
start date	Date			false	false
end date	Date			false	false
status	Choice			false	false
description	String			false	false

**Create one more table:**

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

10. Click on submit.

dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_db\_object.do%3Fsys\_id%3Df53ba8e3835992108663ffd6fead365%26sysparm\_view%3D%26sysparm\_dom...

servicenow All Favorites History Workspaces Table - task table 2 Search

Table task table 2 Delete Update Delete All Records

Table Columns for text Search

Dictionary Entries

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

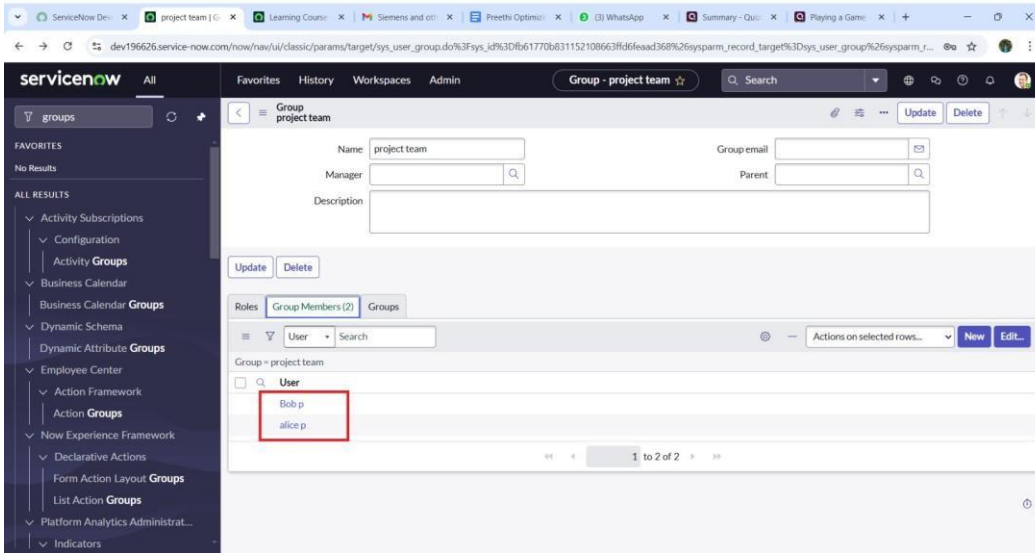
Activate Windows  
Go to Settings to activate Windows

Delete Update Delete All Records

## 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

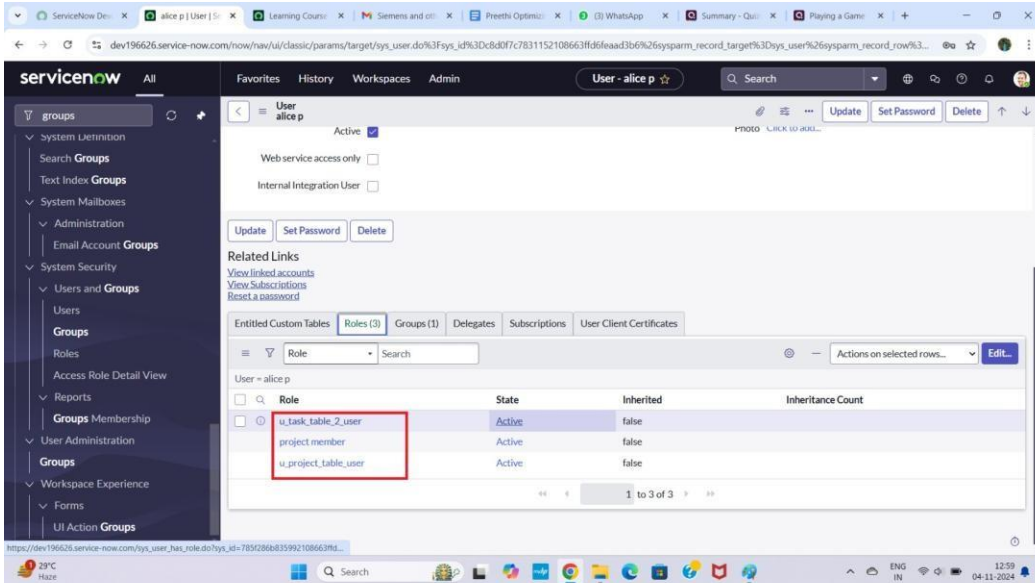


## Milestone 6 : Assign roles to users

### 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.



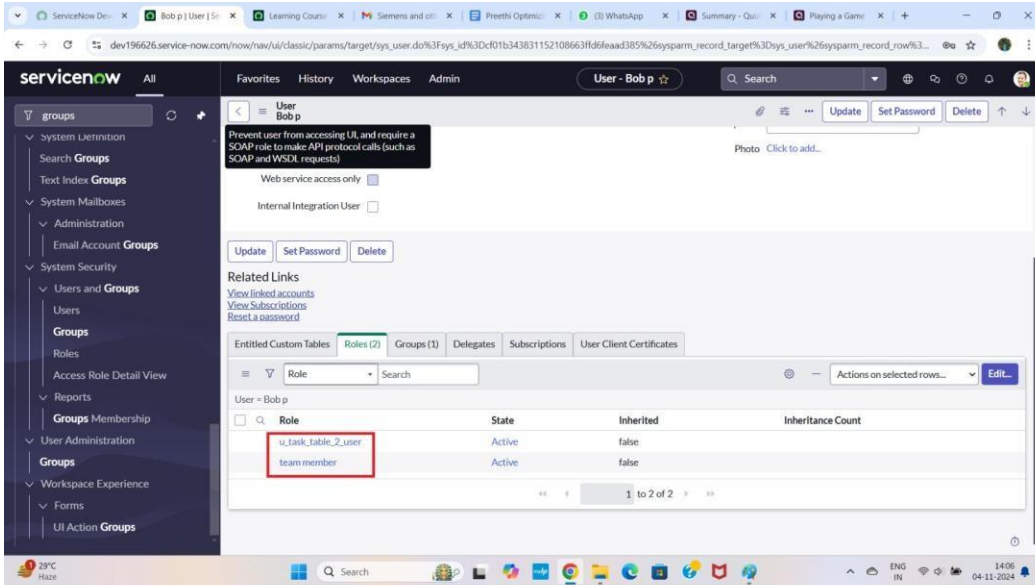


The screenshot shows the ServiceNow user profile page for 'alice p'. The user is active and has the role 'u\_task\_table\_2\_user' assigned. The roles table is as follows:

Role	State	Inherited	Inheritance Count
u_task_table_2_user	Active	false	1
project member	Active	false	1
u_project_table_user	Active	false	1

## Activity 2: 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 a user named 'Bob p'. The left sidebar contains navigation links for 'groups', 'System User', 'System Mailboxes', 'Administration', 'System Security', 'Users and Groups', 'Reports', 'Groups Membership', 'User Administration', 'Groups', 'Workspace Experience', 'Forms', and 'UI Action Groups'. The main content area shows the user profile for 'Bob p' with options to 'Update', 'Set Password', and 'Delete'. Below the profile, there are 'Related Links' and a tabbed interface for 'Entitled Custom Tables', 'Roles (2)', 'Groups (1)', 'Delegates', 'Subscriptions', and 'User Client Certificates'. The 'Roles (2)' tab is active, showing a table of roles for the user 'Bob p'.

Role	State	Inherited	Inheritance Count
u_task_table_2_user	Active	false	
team member	Active	false	

## 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

dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_app\_application.do%3Fsys\_id%3D9705334f831152108663ffd6fead362

servicenow All Favorites History Admin Application Menu - project table Search

Application Menu project table Update Delete

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

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.

dev196626.service-now.com/now/nav/ui/classic/params/target/sys\_app\_application.do%3Fsys\_id%3D114bece3835992108663ffd6fead3dc

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

Application Menu task table 2 Update Delete

\* Title  Application  Active ☒

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

Roles

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

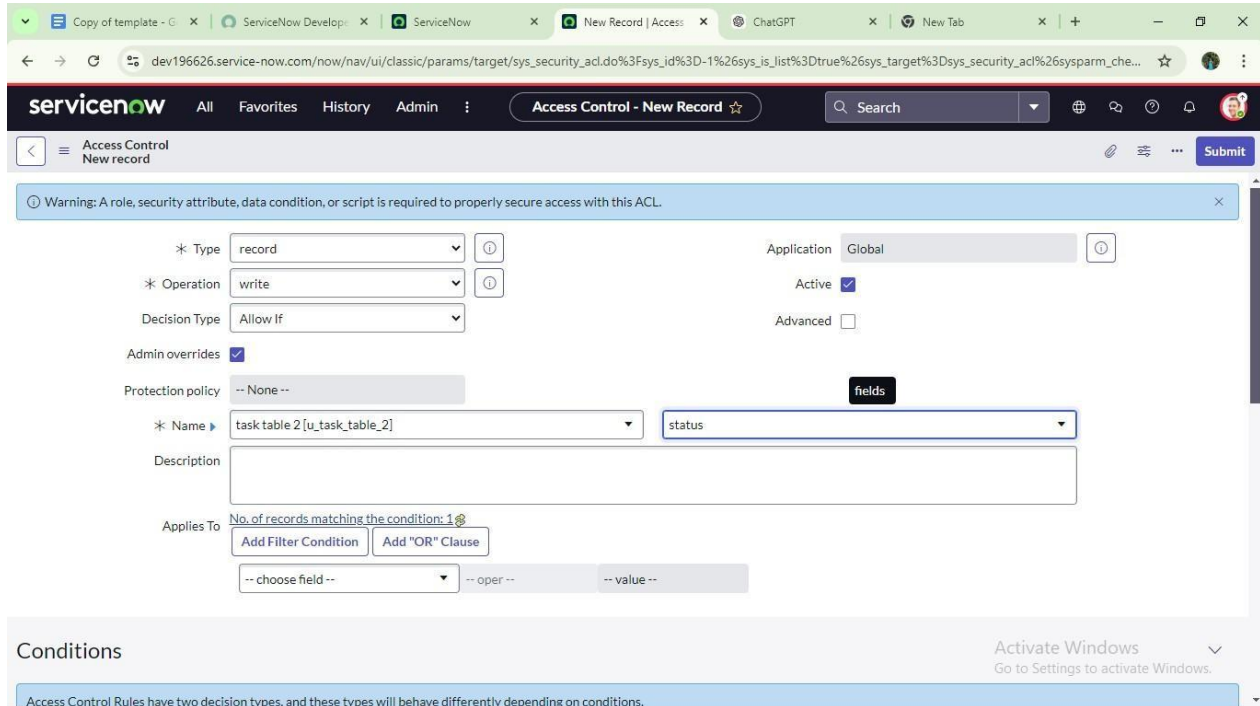
Update Delete

Activate Windows  
Go to Settings to activate Windows.

Modules Order Search 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



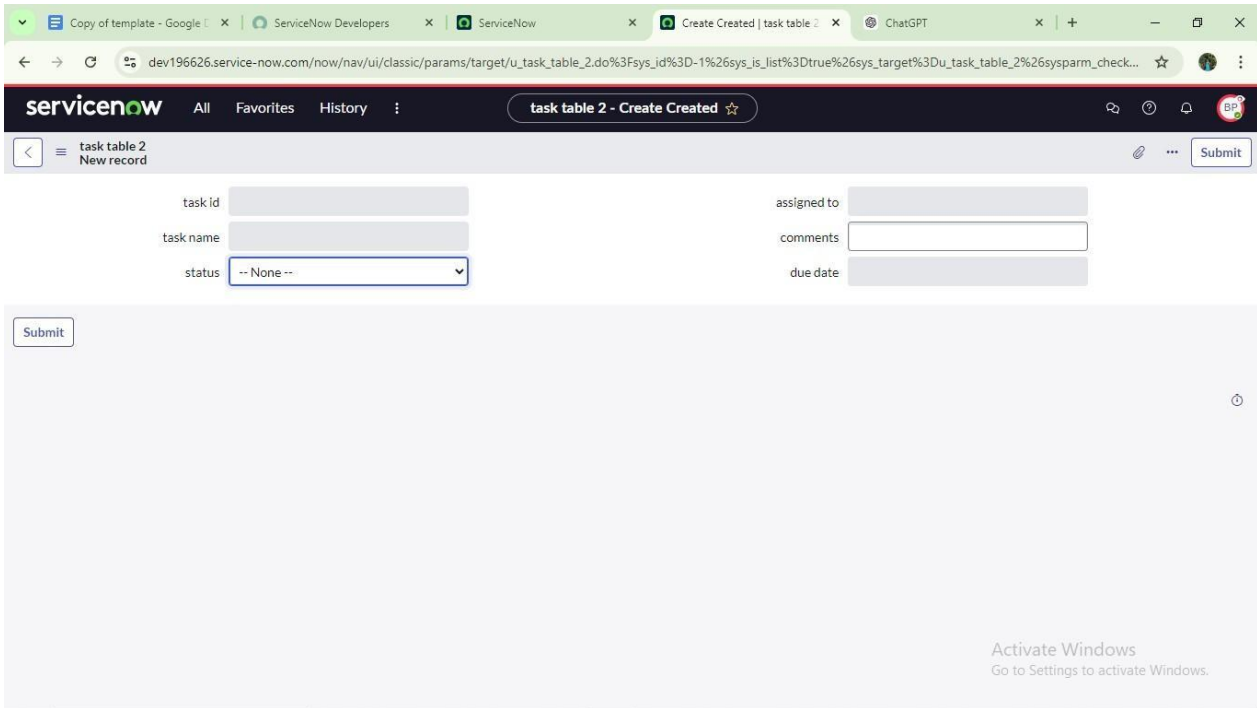
The screenshot shows the ServiceNow 'Access Control - New Record' form. The form includes the following fields and options:

- 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:** status
- Description:** (empty text area)
- Applies To:** No. of records matching the condition: 1
- Buttons:** Add Filter Condition, Add "OR" Clause
- Fields:** -- choose field --, -- oper --, -- value --

At the bottom, there is a 'Conditions' section and a warning message: '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



## 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.

Project on user... ServiceNow Dev... ServiceNow... task table | Wor... Created 2024-10-22 2... ChatGPT... New Tab

dev196626.service-now.com/now/nav/ui/classic/params/target/u\_task\_table\_2.do%3Fsys\_id%3D08adb02f839992108663ffd6fead3bb%26sysparm\_record\_target%3Du\_task\_t...

task table 2 - Created 2024-10-22 2...

Search

Update Delete

flow

FAVORITES  
No Results

ALL RESULTS

Process Automation

Workflow Studio

Flow Designer

Flow & Action Designer

Today's Executions

Active Flows

Content Definitions

assigned to bob

comments

due date

Activate Windows  
Go to Settings to activate Windows.

https://dev196626.service-now.com/\$flow-designer.do?sysparm\_nostack=true

Project on user... ServiceNow Dev... ServiceNow... Homepage - Flo... Created 2024-10-22 2... ChatGPT... New Tab

dev196626.service-now.com/now/workflow-studio/home/flow

Workflow Studio

task table Flow

Homepage Operations Integrations

Playbooks Flows Subflows Actions Decision tables

Flows 39  
Last refreshed just now

Name	Application	Status	Active	Update
Benchmark Recommendation Evaluator	Benchmarks Spoke	Published	true	2024-09-27 04:23:59
Business process approval flow	Global	Published	true	2020-09-27 04:23:59
Change - Cloud Infrastructure - Authorize	Global	Published	true	2020-11-11 07:08:05
Change - Emergency - Authorize	Global	Published	true	2020-10-06 05:39:49
Change - Emergency - Implement	Global	Published	true	2020-09-23 05:06:26
Change - Emergency - Review	Global	Published	true	2020-10-27 04:18:08
Change - Normal - Assess	Global	Published	true	2020-10-06 05:37:05
Change - Normal - Authorize	Global	Published	true	2020-10-06 05:38:35
Change - Normal - Implement	Global	Published	true	2020-09-23 04:23:59

New

Playbook

Flow

Subflow

Action

Decision table

Pick up where you left off

task table  
Last updated: 14 min. ago by Syst...

Create Flow Data  
Last updated: 5 months ago by Sy...

Steps  
Last updated: 5 months ago by Sy...

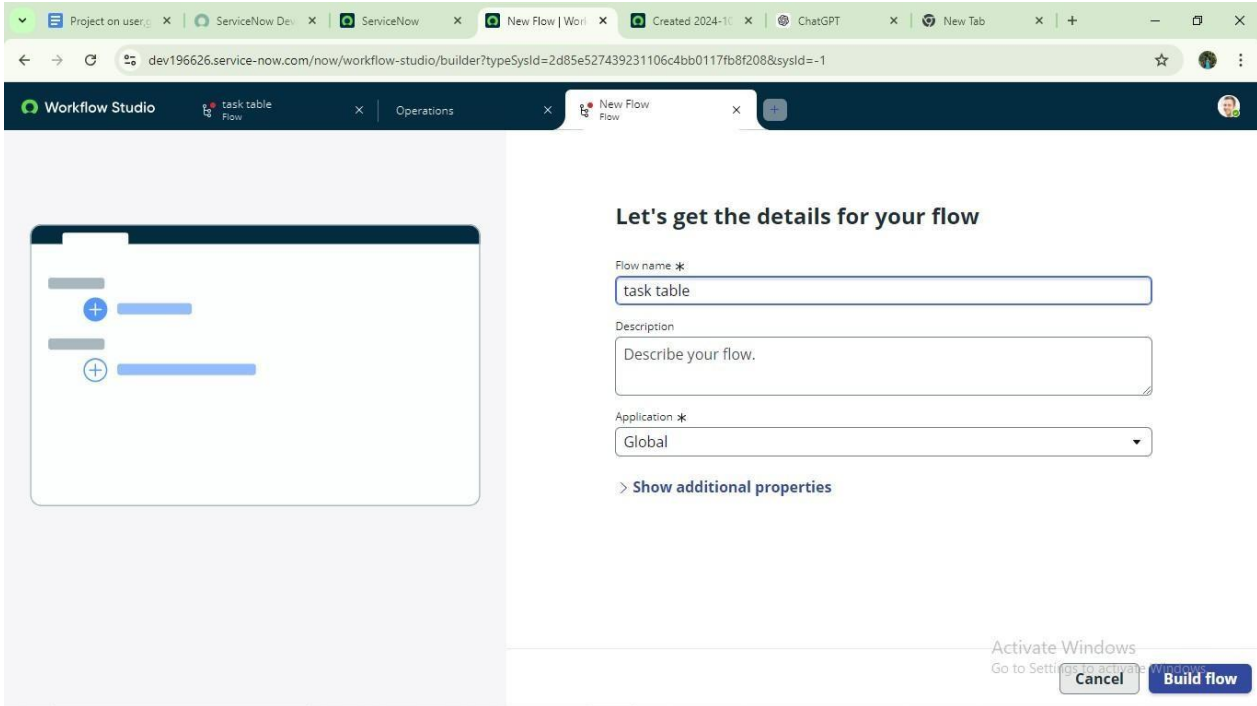
Latest updates

System Administrator modified task table  
14 min. ago

System Administrator modified Create Flow Data  
5 months ago

System Administrator modified Steps  
5 months ago





Workflow Studio

task table Flow

Operations

New Flow Flow

### Let's get the details for your flow

Flow name \*  
task table

Description  
Describe your flow.

Application \*  
Global

> Show additional properties

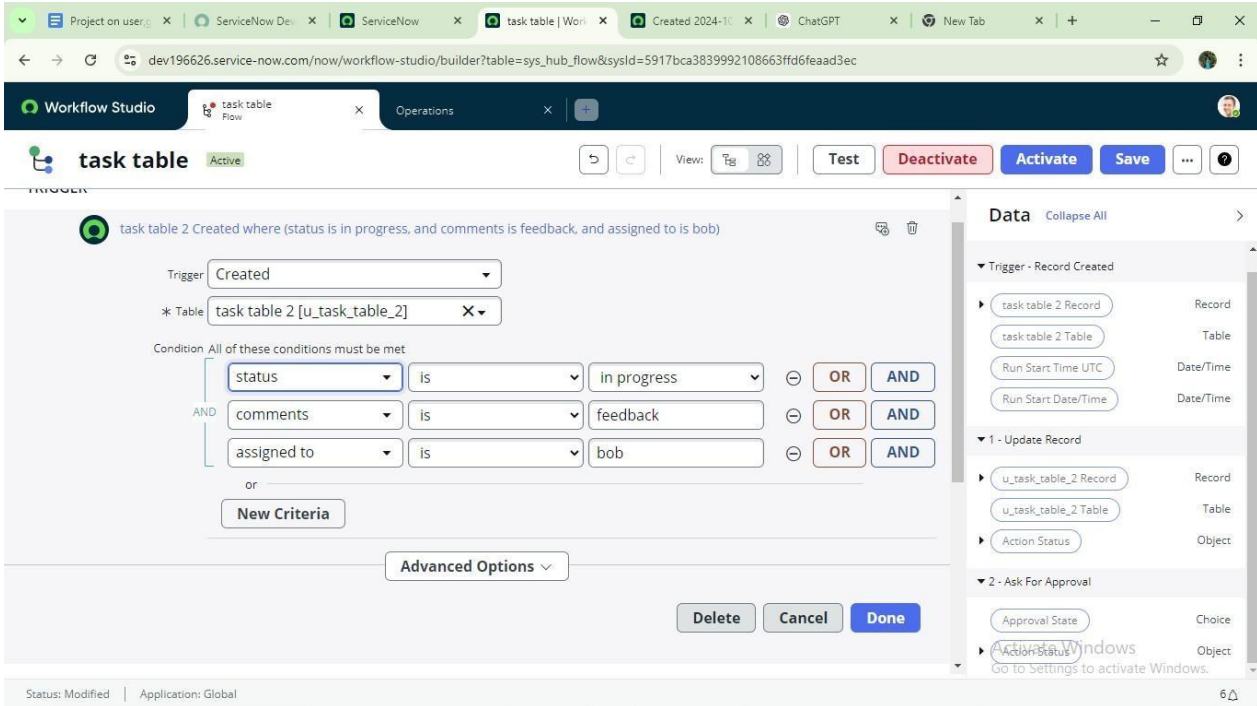
Activate Windows  
Go to Settings to activate Windows

Cancel 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.





The screenshot shows the ServiceNow Workflow Studio interface. The main workspace displays a workflow configuration for 'task table 2'. The trigger is set to 'Created'. The table is 'task table 2 [u\_task\_table\_2]'. The condition is 'All of these conditions must be met' with three criteria: 'status is in progress', 'comments is feedback', and 'assigned to is bob'. The right sidebar shows the 'Data' section with a list of available fields for the 'Update Record' action, including 'u\_task\_table\_2 Record', 'u\_task\_table\_2 Table', and 'Action Status'.

Workflow Studio

task table 2 Created where (status is in progress, and comments is feedback, and assigned to is bob)

Trigger: Created

\* Table: task table 2 [u\_task\_table\_2]

Condition: All of these conditions must be met

AND

status is in progress

comments is feedback

assigned to is bob

New Criteria

Advanced Options

Delete Cancel Done

Data

Trigger - Record Created

- task table 2 Record (Record)
- task table 2 Table (Table)
- Run Start Time UTC (Date/Time)
- Run Start Date/Time (Date/Time)

1 - Update Record

- u\_task\_table\_2 Record (Record)
- u\_task\_table\_2 Table (Table)
- Action Status (Object)

2 - Ask For Approval

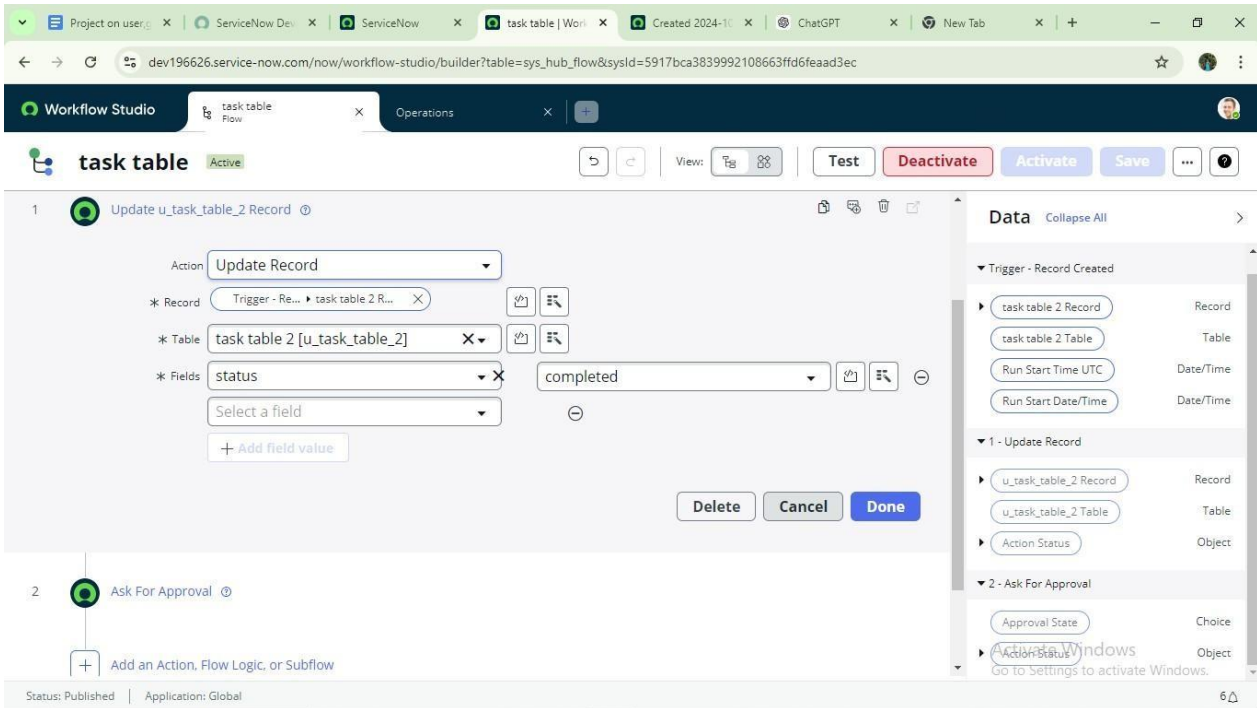
- Approval State (Choice)
- Action Status (Object)

Go to Settings to activate Windows.

Status: Modified | Application: Global

## Next step:

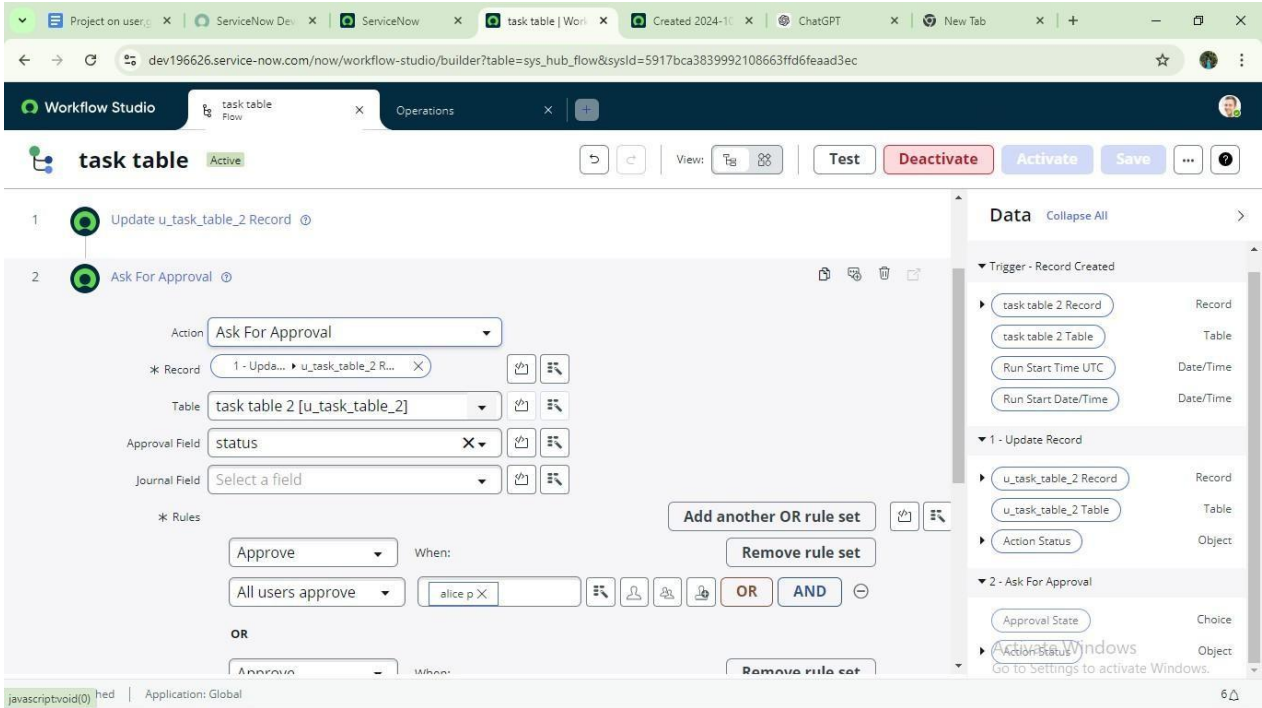
1. Click on Add an action.
2. Select action in that ,search for “ update records”.
3. In Record field drag the fields from the data navigation from Right Side(Data pill)
4. Table will be auto assigned after that
5. Add fields as “status” and value as “completed”
6. Click on Done.



The screenshot shows the ServiceNow Workflow Studio interface. The main workspace displays the configuration for an 'Update Record' action. The 'Record' field is set to 'Trigger - Record', the 'Table' is 'task table 2 [u\_task\_table\_2]', and the 'Fields' section shows 'status' being updated to 'completed'. The right-hand 'Data' pane lists available fields for the workflow, including 'task table 2 Record', 'task table 2 Table', 'Run Start Time UTC', 'Run Start Date/Time', 'u\_task\_table\_2 Record', 'u\_task\_table\_2 Table', 'Action Status', 'Approval State', and 'Action Status'. The bottom status bar indicates 'Status: Published' and 'Application: Global'.

## 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.



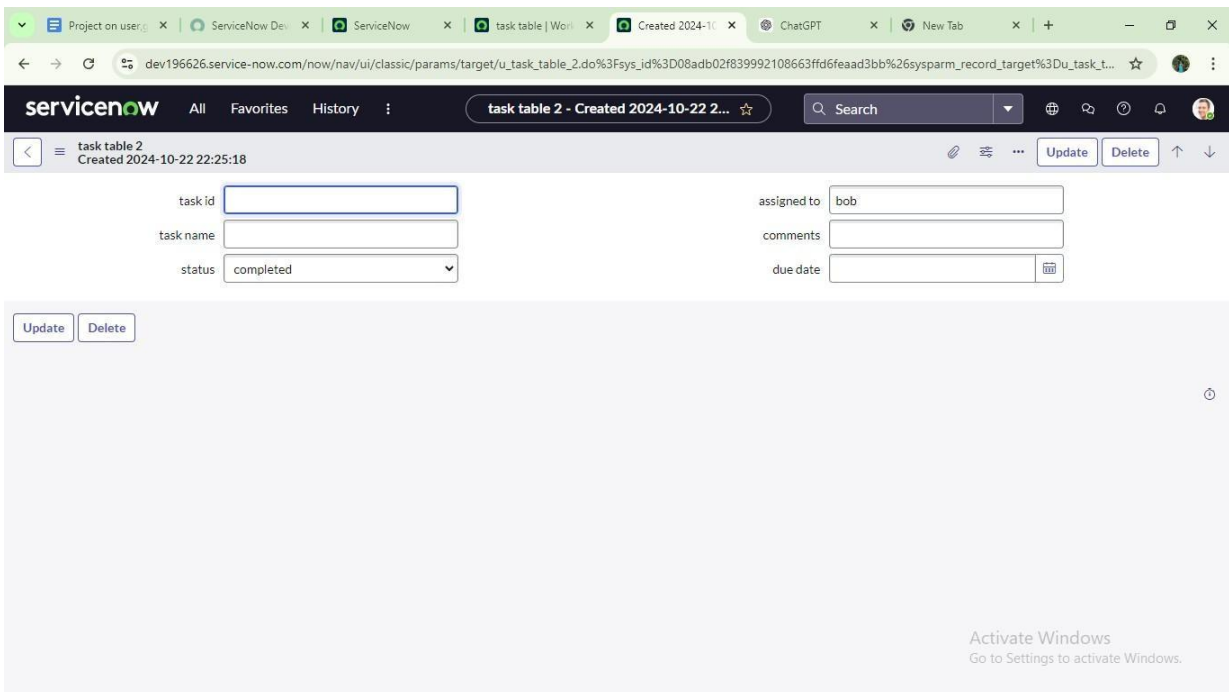
The screenshot shows the ServiceNow Workflow Studio interface for a workflow named 'task table'. The workflow consists of two steps:

- Update u\_task\_table\_2 Record**: This step is configured with the following details:
  - Action**: Ask For Approval
  - Record**: 1 - Update u\_task\_table\_2 R...
  - Table**: task table 2 [u\_task\_table\_2]
  - Approval Field**: status
  - Journal Field**: Select a field
  - Rules**: A rule set is defined with the condition 'Approve' and the action 'All users approve'.
- Ask For Approval**: This step is currently empty.

The right-hand pane shows the **Data** section, which lists the data available for the workflow steps. It includes fields like 'task table 2 Record', 'task table 2 Table', 'Run Start Time UTC', 'Run Start Date/Time', 'u\_task\_table\_2 Record', 'u\_task\_table\_2 Table', 'Action Status', 'Approval State', and 'Action Status'.

9. Go to application navigator search for task table.

10. Its status field is updated to completed

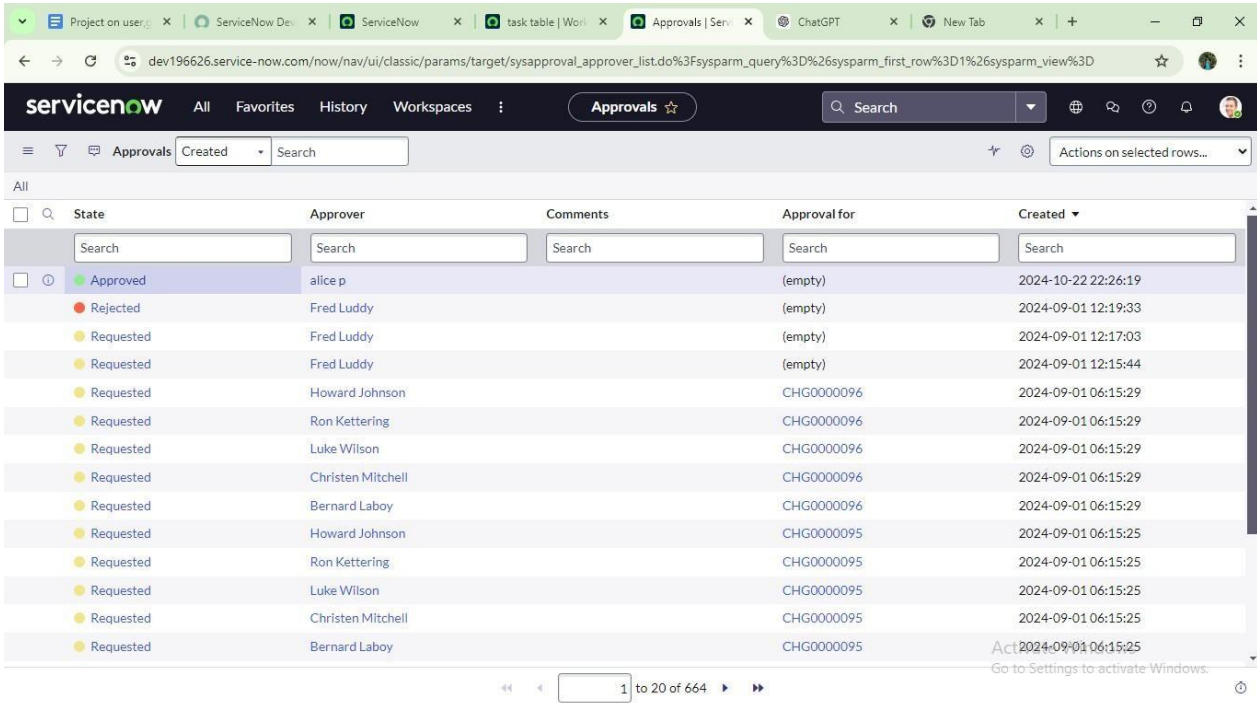


The screenshot shows the ServiceNow application navigator interface for the 'task table 2' record. The record is displayed with the following details:

- task id**: [Empty text field]
- task name**: [Empty text field]
- status**: completed (dropdown menu)
- assigned to**: bob (text field)
- comments**: [Empty text field]
- due date**: [Empty date field]

At the bottom of the record, there are 'Update' and 'Delete' buttons. The status field is currently set 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



The screenshot shows the ServiceNow 'Approvals' page. The table lists various approval requests with columns for State, Approver, Comments, Approval for, and Created. The first row is highlighted as 'Approved' for 'alice p' on '2024-10-22 22:26:19'. Other rows show 'Requested' status for various approvers like Fred Luddy, Howard Johnson, Ron Kettering, Luke Wilson, Christen Mitchell, Bernard Laboy, and Howard Johnson, all with creation dates around 2024-09-01.

State	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2024-10-22 22:26:19
Rejected	Fred Luddy		(empty)	2024-09-01 12:19:33
Requested	Fred Luddy		(empty)	2024-09-01 12:17:03
Requested	Fred Luddy		(empty)	2024-09-01 12:15:44
Requested	Howard Johnson		CHG0000096	2024-09-01 06:15:29
Requested	Ron Kettering		CHG0000096	2024-09-01 06:15:29
Requested	Luke Wilson		CHG0000096	2024-09-01 06:15:29
Requested	Christen Mitchell		CHG0000096	2024-09-01 06:15:29
Requested	Bernard Laboy		CHG0000096	2024-09-01 06:15:29
Requested	Howard Johnson		CHG0000095	2024-09-01 06:15:25
Requested	Ron Kettering		CHG0000095	2024-09-01 06:15:25
Requested	Luke Wilson		CHG0000095	2024-09-01 06:15:25
Requested	Christen Mitchell		CHG0000095	2024-09-01 06:15:25
Requested	Bernard Laboy		CHG0000095	2024-09-01 06:15:25

## Conclusion :

This project on *Educational Organization using ServiceNow* improves efficiency in managing academic processes. It automates workflows and reduces manual effort. Role-based access ensures security and transparency. Overall, it provides a simple and user-friendly system for institutions.