

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

**Team ID : NM2025TMID16444**

**Team Members: 5**

**Team Leader : Soundharya S**

**Team member 1 : Rosiya parveen S**

**Team member 2 : Sopika P**

**Team member 3 : Deva Dharshini S**

**Team member 4 : Dharani L**

## **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:**

Automate repetitive and manual task to streamline project process save time, and reduce human error to improve efficiency, group control management, Access control, Blueprint creation

## **SKILLS:**

### **TECHNICAL SKILLS**

- 1.Automation Skills
- 2.Management Software
- 3.Networking And Security

### **SOFT SKILLS:**

- 1.Problem Solving
- 2.Communication
- 3.Planning and Organization

## **TASK INITIATION**

### **Milestone 1 :User**

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

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

The screenshot shows the ServiceNow user management interface for a user named 'Alice p'. The form is divided into two main sections. The left section contains fields for 'User ID' (filled with 'Alice'), 'First name' (filled with 'Alice'), 'Last name' (filled with 'p'), 'Title' (empty), and 'Department' (empty with a search icon). Below these are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), and 'Internal Integration User'. The right section contains fields for 'Email' (filled with 'Alice@gmail.com'), 'Identity type' (set to 'Human'), 'Language' (set to '-- None --'), 'Calendar integration' (set to 'Outlook'), 'Time zone' (set to 'System (America/Los Angeles)'), 'Date format' (set to 'System (yyyy-MM-dd)'), 'Business phone' (empty), 'Mobile phone' (empty), and a 'Photo' field with a 'Click to add...' link. At the bottom of the form are buttons for 'Update', 'Set Password', and 'Delete'. Below the form is a 'Related Links' section with links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the very bottom, there is a tabbed interface with 'Entitled Custom Tables' selected, showing a table with columns for 'Table' and 'Search'.

## Create one more user:

7. Create another user with the following details

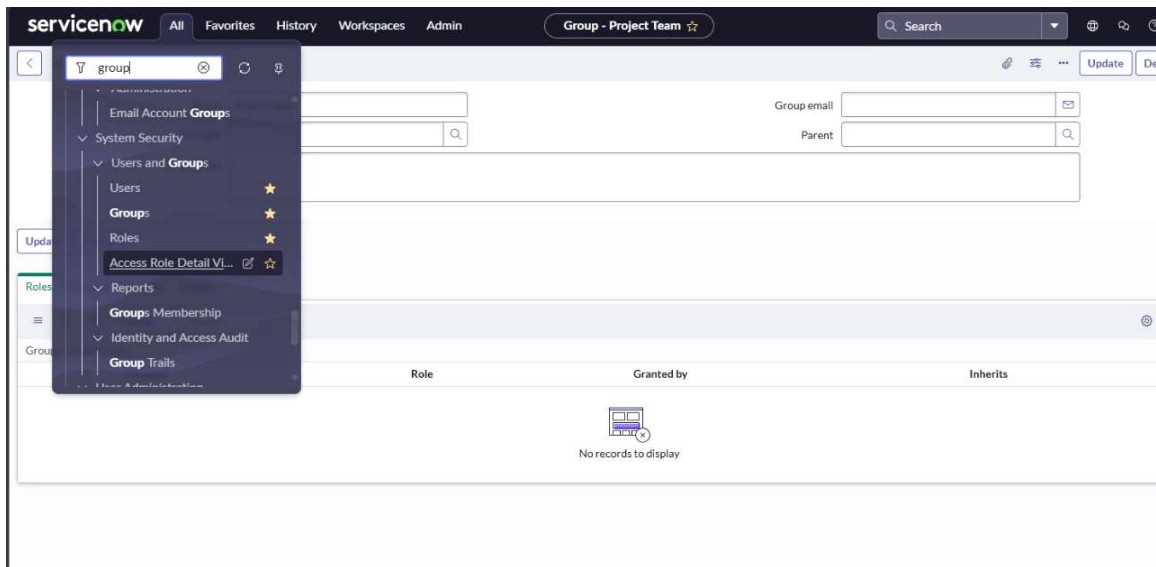
8. Click on submit

This screenshot is identical to the one above, showing the ServiceNow user management interface for 'Alice p'. It displays the same form fields, checkboxes, and navigation elements, including the 'Update', 'Set Password', and 'Delete' buttons, the 'Related Links' section, and the bottom tabbed interface.

## Milestone 2 :Groups

### Activity 1: Create Groups

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



servicenow All Favorites History Workspaces Admin Group - Project Team

Name Project Team Group email Group email Manager Manager Parent Parent Description Description

Update Delete

Roles Group Members (2) Groups

Created Search Edit...

Created	Role	Granted by	Inherits
No records to display			

## Milestone 3 : Roles

### Activity 1:Create Roles

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

servicenow All Favorites History Workspaces Admin Role - team member

Name team member Application Global

Description

Update Delete

Contains Roles Applications with Role (1) Modules with Role (1) Custom Tables

for text Search

Role - team member

Contains

No records to display

## Create one more role:

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

servicenow All Favorites History Workspaces Admin Role - Project member

Name Project member Application Global

Description

Update Delete

Contains Roles Applications with Role (2) Modules with Role (2) Custom Tables

for text Search

Role = Project member

Contains

No records to display

## Milestone 4:Table

### Activity:Create Table

1. Now Open service now.
2. And Click on All >> search for table
3. Then Select tables under the system definition
4. Go and 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. Finally Click on submit

servicenow All Favorites History Workspaces Admin Table - New Record

ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).

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 Create module: ☒

Extends table: Create mobile module: ☒

Add module to menu: -- Create new --

New menu name: project table

Remote Table: ☐

Columns Controls Application Access

Table Columns for text Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Insert a new row...					

Submit Cancel

## Create one more table:

9. Again Create another table as: task table 2 and fill with following details.
10. Click on submit.

ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).

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: task table 2  
\* Name: u\_task\_table\_2  
Extends table:

Application: Global  
Create module: ☒  
Create mobile module: ☒  
Add module to menu: -- Create new --  
New menu name: task table 2  
Remote Table: ☐

Columns | Controls | Application Access

Table Columns for text Search

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Insert a new row...					

Submit Cancel

## Milestone 5:Assign user to Group

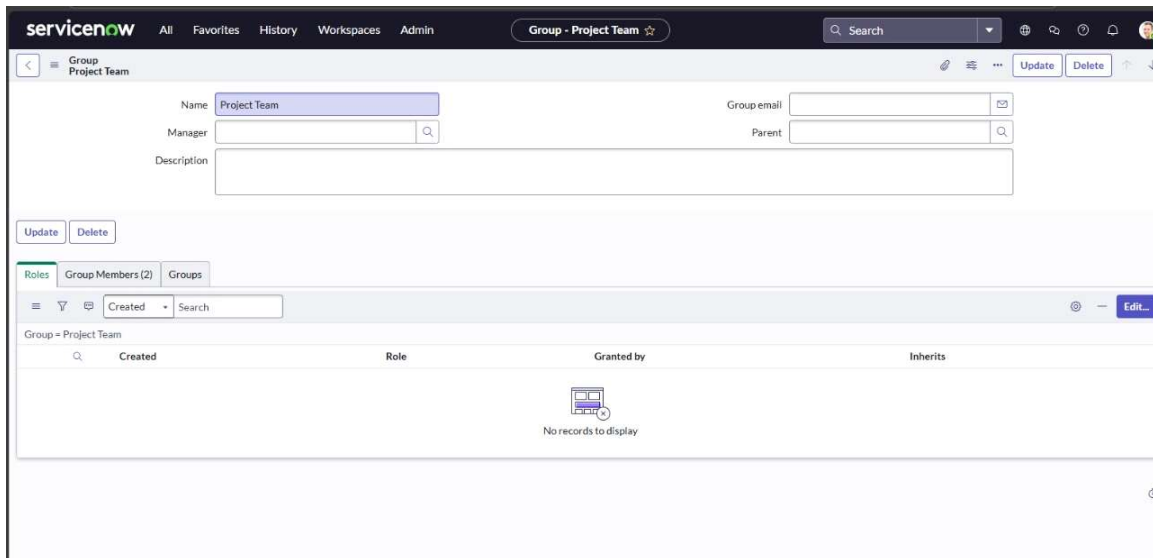
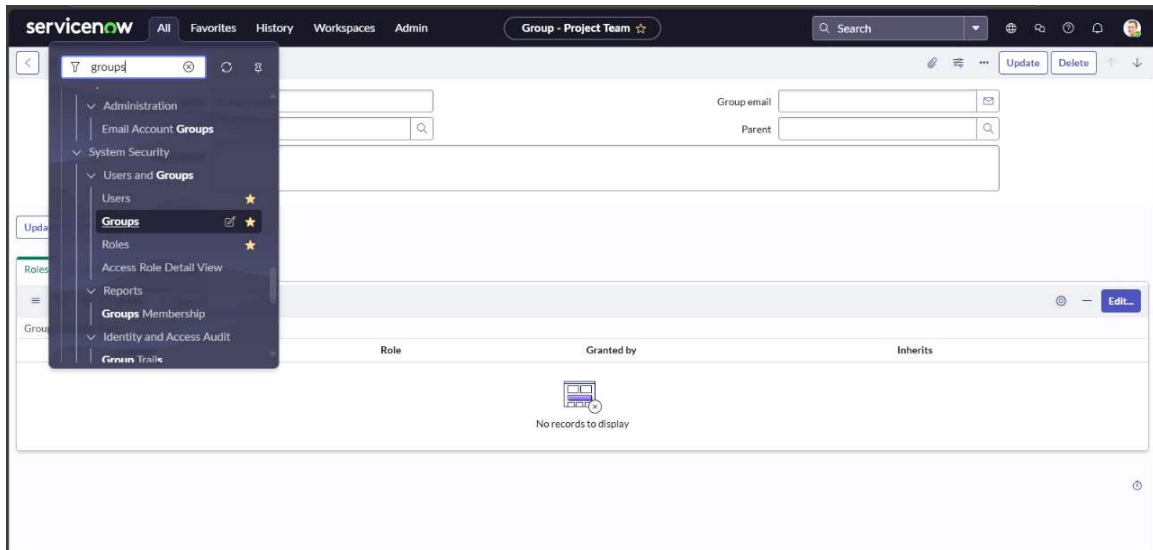
### Activity 1:Assign users to project team group

1. To Open service now.
2. And Click on All >> search for groups
3. Select tables under the system definition
4. Select the project team group
5. Under group members



6. Click on edit

7. Finally Select alice p and bob p and save



## Milestone 6:Assign Roles To Users

## Activity 1: Assign roles to alice user

1. Now Open servicenow.  
Click on All >> search for user
2. Then Select tables under system definition
3. To 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. Finally click on save and update the form.

The screenshot shows the ServiceNow user profile page for 'User - Alice p'. The page includes a header with navigation tabs (All, Favorites, History, Workspaces, Admin) and a search bar. The main content area is divided into two columns. The left column contains user details: First name (Alice), Last name (p), Title, Department, Password needs reset, Locked out, Active (checked), and Internal Integration User. The right column contains identity and integration details: Identity type (Human), Language, Calendar integration (Outlook), Time zone (System (America/Los Angeles)), Date format (System (yyyy-MM-dd)), Business phone, and Mobile phone. Below these fields are buttons for 'Update', 'Set Password', and 'Delete'. A 'Related Links' section provides links to 'View linked accounts', 'View subscriptions', and 'Reset a password'. At the bottom, there is a table titled 'Entitled Custom Tables' with tabs for 'Roles (1)', 'Groups (1)', 'Delegates', 'Subscriptions', and 'User Client Certificates'. The 'Roles (1)' tab is selected, showing a table with columns: Role, State, Inherited, and Inheritance Count. The table contains one row: Project member, Active, false, and Inheritance Count.

Role	State	Inherited	Inheritance Count
Project member	Active	false	

## Activity 2: Assign roles to bob user

1. To Open ServiceNow.  
Click on All >> search for user
2. Then Select tables under system definition

3. To 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 profile interface for a user named 'Bop p'. The page is divided into several sections:

- Header:** ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces, Admin), and a search bar.
- User Information:**
  - User ID: bop
  - First name: Bop
  - Last name: p
  - Title: (empty)
  - Department: (empty)
  - Email: Bop@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)
- Account Settings:**
  - Password needs reset: ☐
  - Locked out: ☐
  - Active: ☒
  - Internal integration User: ☐
- Buttons:** Update, Set Password, Delete.
- Related Links:**
  - [View linked accounts](#)
  - [View Subscriptions](#)
  - [Reset a password](#)
- Entitled Custom Tables:** Roles (2), Groups (1), Delegates, Subscriptions, User Client Certificates.
- Table View:** A table showing the user's roles. The table has columns: Role, State, Inherited, and Inheritance Count.
 

Role	State	Inherited	Inheritance Count
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. To 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 interface for configuring an application menu. The title is 'task table 2'. The application is set to 'Global' and is active. The roles assigned are 'Project member, team member, u\_task\_table\_2\_user'. The category is 'Custom Applications'. There are input fields for a hint and a description, and buttons for 'Update' and 'Delete'.

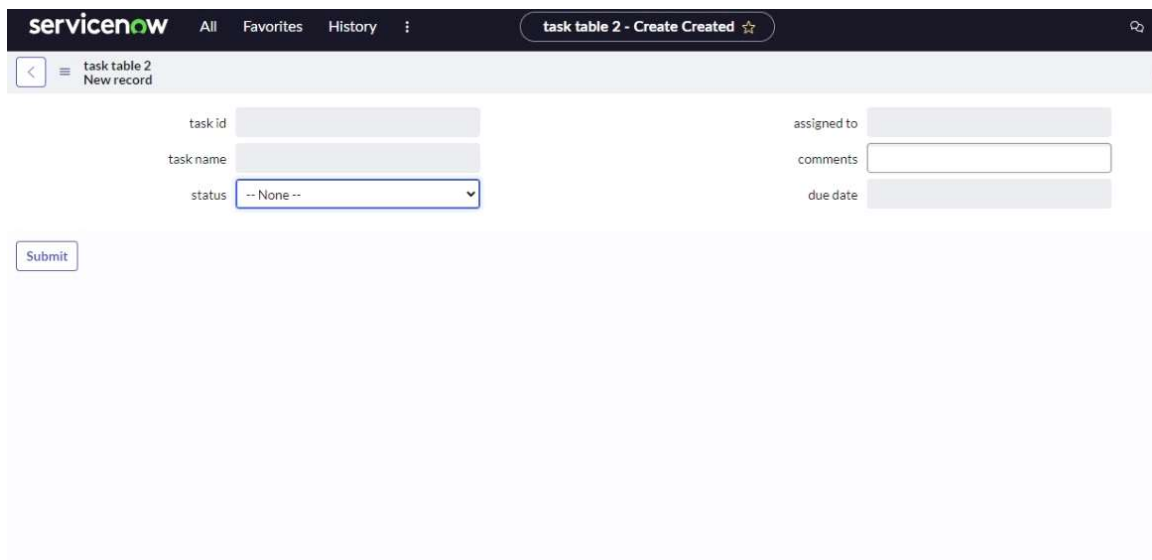
## Milestone 8 : Access Control List

### Activity 1: Create ACL

1. Now Open service now.
2. To 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
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

Comment and status fields are have the edit access



The screenshot shows the ServiceNow interface for creating a new record in 'task table 2'. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', and a search icon. The main header indicates 'task table 2 - Create Created' with a star icon. Below this, the breadcrumb 'task table 2' and 'New record' are visible. The form contains several fields: 'task id' (text input), 'task name' (text input), 'status' (dropdown menu with '-- None --' selected), 'assigned to' (text input), 'comments' (text area), and 'due date' (text input). A 'Submit' button is located at the bottom left of the form area.

## 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.

**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]

Description:

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

Add Filter Condition Add "OR" Clause

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

### 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 interface for creating a new record in 'task table 2'. The header bar includes the ServiceNow logo, navigation links (All, Favorites, History), and a breadcrumb trail 'task table 2 - Create Created'. Below the header, the form title 'task table 2 New record' is displayed. The form contains several input fields: 'task id', 'task name', 'status' (a dropdown menu currently showing '-- None --'), 'assigned to', 'comments', and 'due date'. A 'Submit' button is located at the bottom left of the form area.

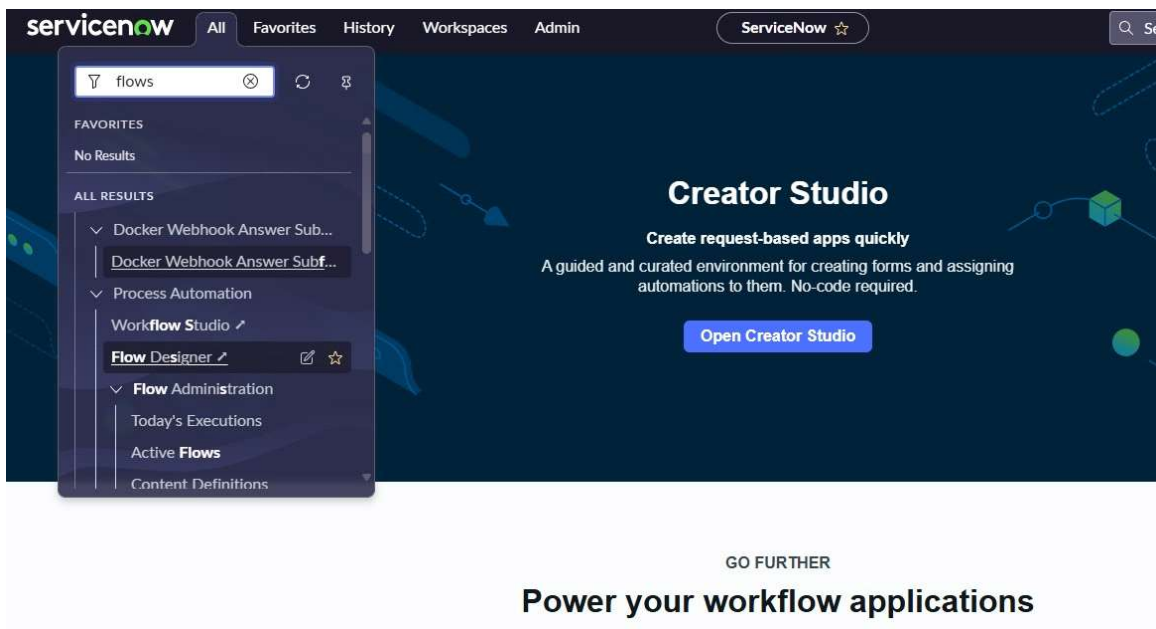
**Next step:**

- 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. Its 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





The screenshot displays the ServiceNow 'Approvals' page. The header includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces), and a search bar. Below the header, there's a filter section with 'Approvals' selected and a 'Created' dropdown. The main table lists approval requests with columns for State, Approver, Comments, Approval for, and Created. The first row is highlighted in blue and shows an 'Approved' state by 'alice p' on '2024-10-22'. Subsequent rows show 'Rejected' and 'Requested' states by various approvers like 'Fred Luddy', 'Howard Johnson', 'Ron Kettering', 'Luke Wilson', and 'Christen Mitchell' on '2024-09-01'.

State	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2024-10-22
Rejected	Fred Luddy		(empty)	2024-09-01
Requested	Fred Luddy		(empty)	2024-09-01
Requested	Fred Luddy		(empty)	2024-09-01
Requested	Howard Johnson		CHG0000096	2024-09-01
Requested	Ron Kettering		CHG0000096	2024-09-01
Requested	Luke Wilson		CHG0000096	2024-09-01
Requested	Christen Mitchell		CHG0000096	2024-09-01
Requested	Bernard Laboy		CHG0000096	2024-09-01
Requested	Howard Johnson		CHG0000095	2024-09-01
Requested	Ron Kettering		CHG0000095	2024-09-01
Requested	Luke Wilson		CHG0000095	2024-09-01
Requested	Christen Mitchell		CHG0000095	2024-09-01

## CONCLUSION:

The Projects creates a clear system for managing a team. It fixes problems with task assignments and tracking progress. By using ServiceNow, the system automates tasks, saves time, and reduces mistakes. It sets up roles for team members, assigns them to groups, and controls their access to information. The new system also automates workflows, like getting approvals for completed tasks. This makes the whole process more efficient and keeps everyone accountable.