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

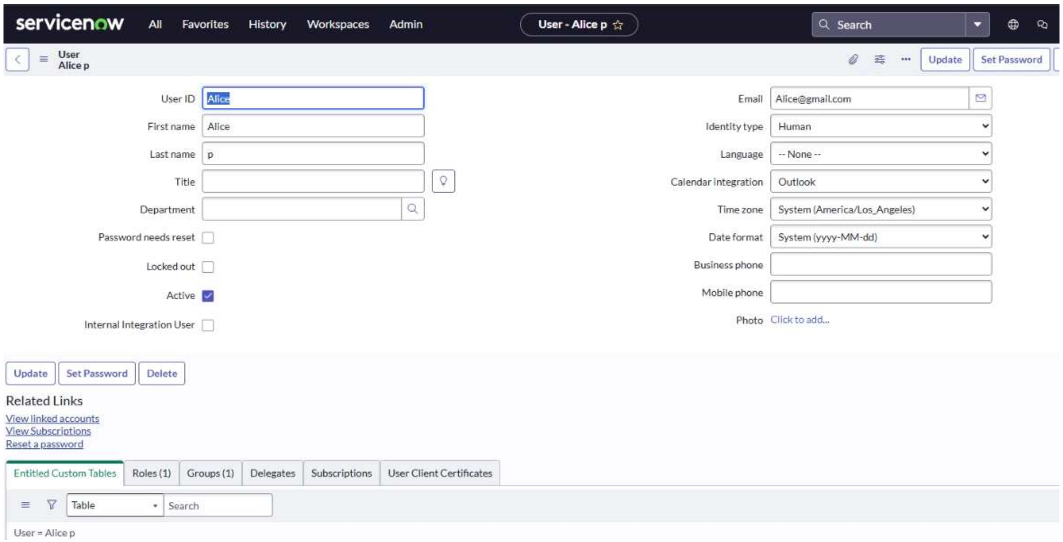
SOFT SKILLS:

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

TASK INITIATION

Milestone 1 :User
Activity 1: Create Users

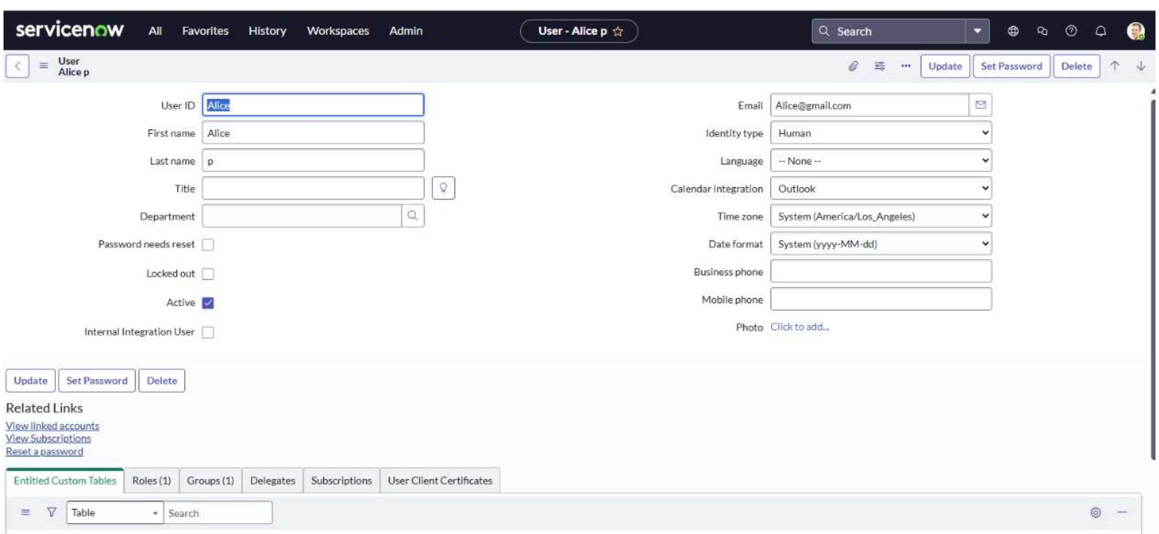
1. Now Open service now
2. And Click on All >> search for users
3. Then Select Users under system security
4. Go and Click on new
5. Fill the following details to create a new user as per the order
6. Click on submit



Create one more user:

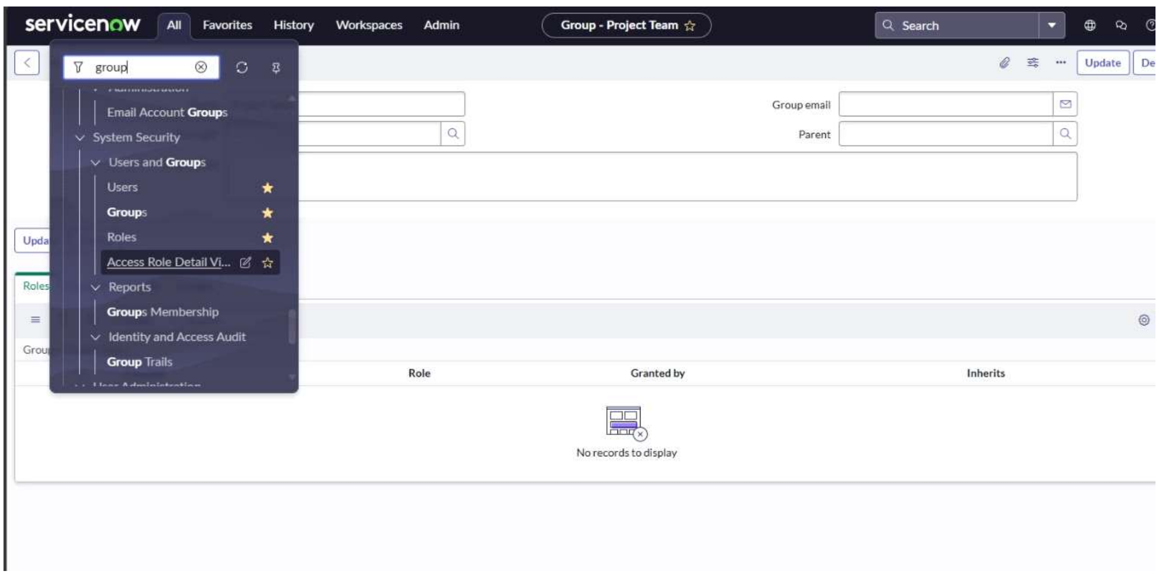
7. Create another user with the following details

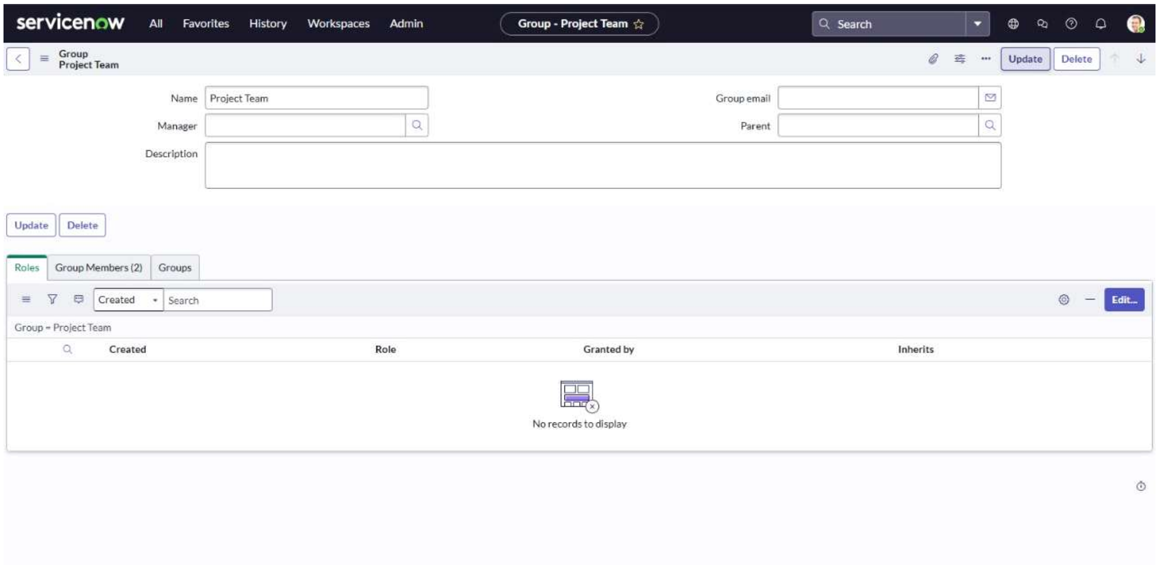
8. Click on submit



Milestone 2 :Groups
Activity 1: Create Groups

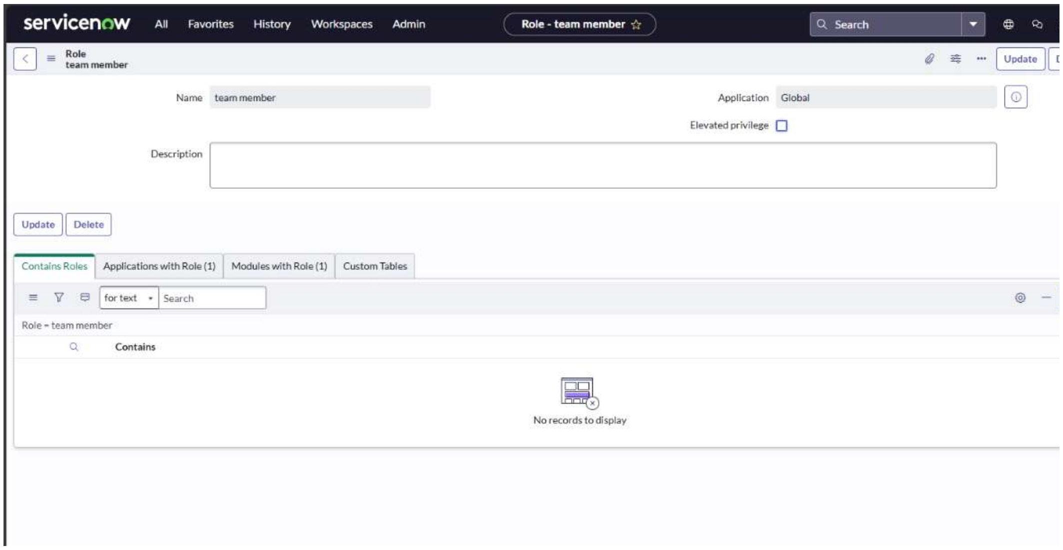
1. To Open service now.
2. And Click on All >> search for groups
3. Select groups under the system security
4. Then Click on new
5. To Fill the following details to create a new group
6. Finally Click on submit





Milestone 3 : Roles
Activity 1:Create Roles

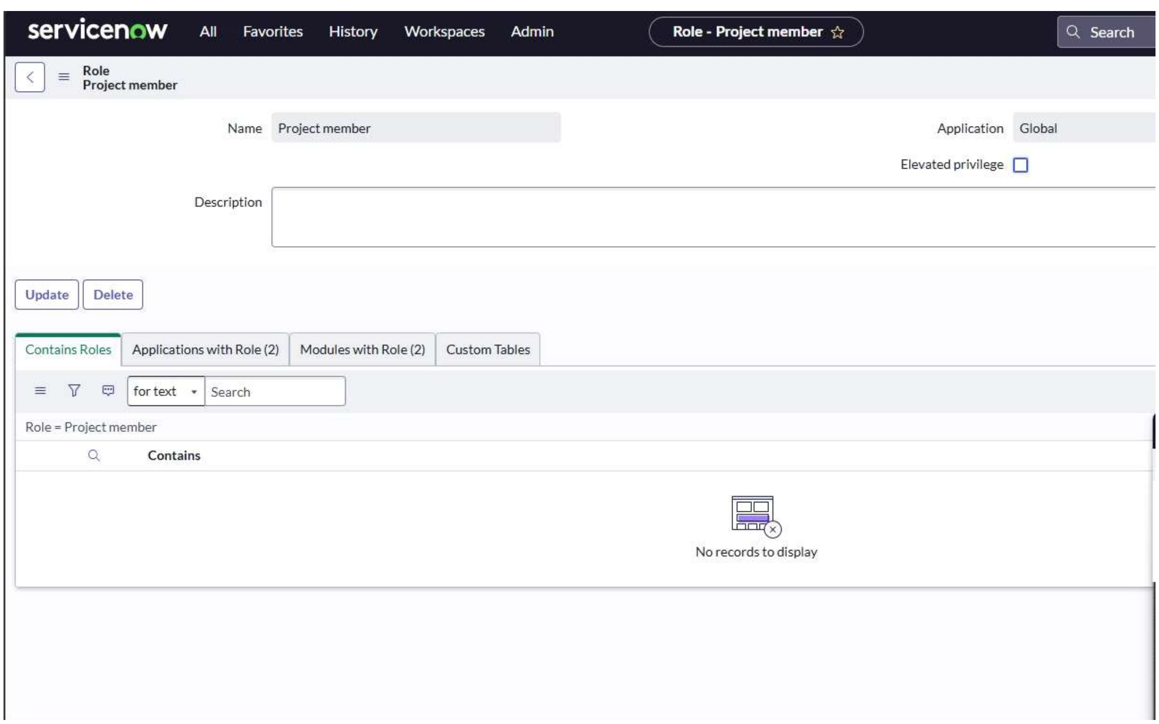
1. To Open service now.
2. And Click on All >> search for roles
3. Select roles under the system security
4. Now Click on new
5. To Fill the following details to create a new role
6. Finally Click on submit



Create one more role:

7. To Create another role with the following details : Team member

8. Click on submit



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

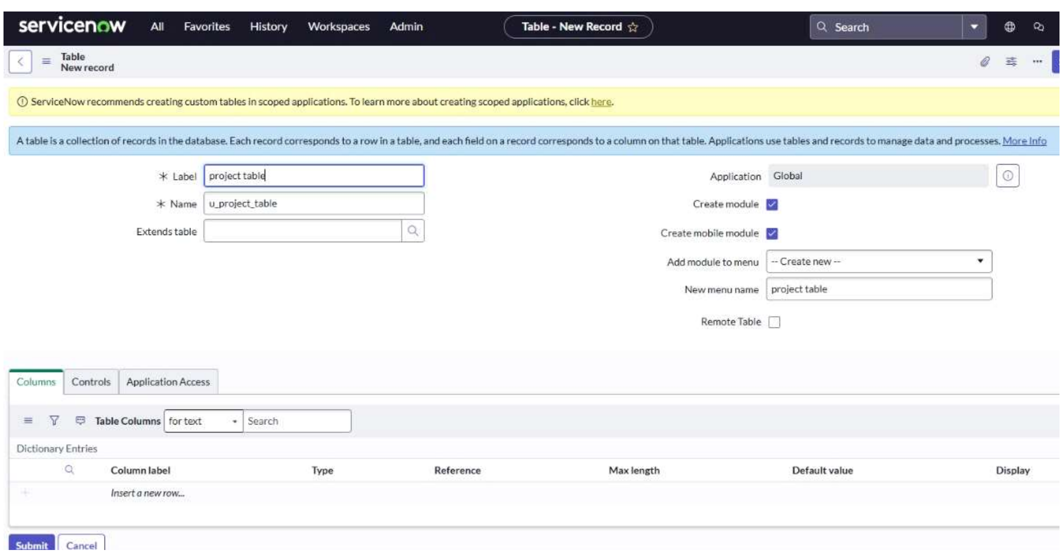
   Label : project table

   Check the boxes Create module & Create mobile module

6. Under new menu name : project table

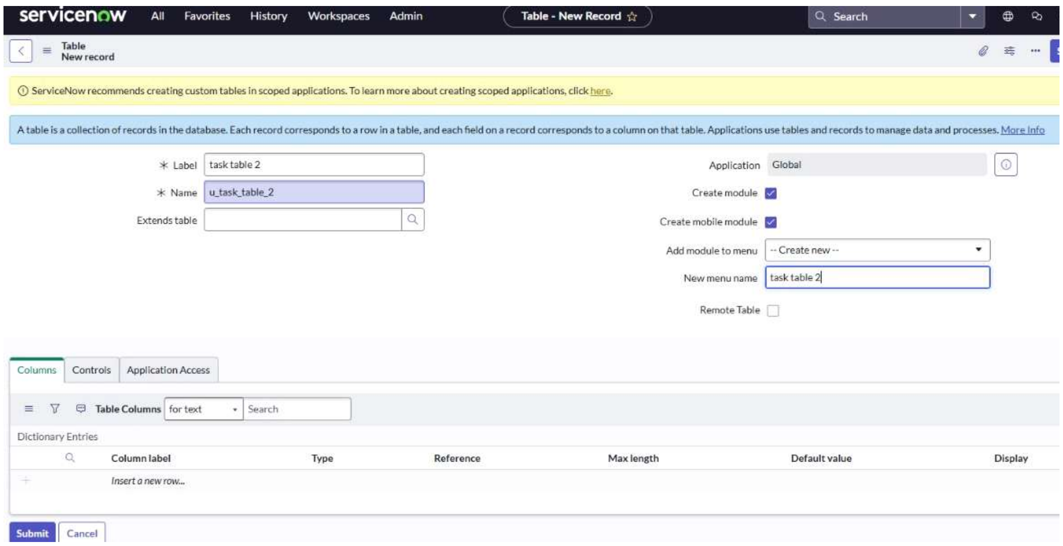
7. Under table columns give the columns

8. Finally Click on submit



Create one more table:

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



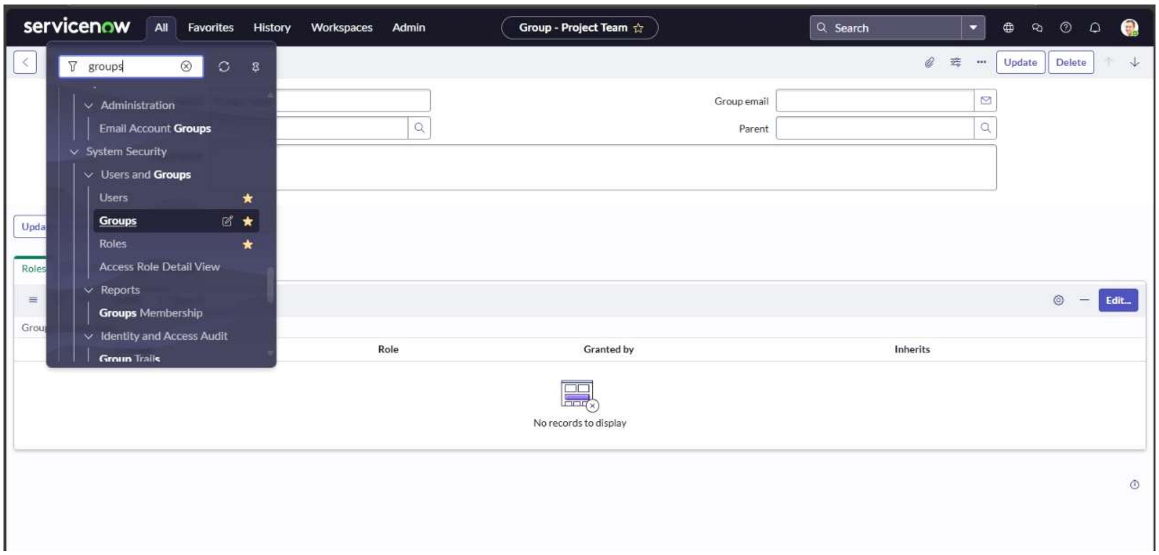
Milestone 5:Assign user to Group

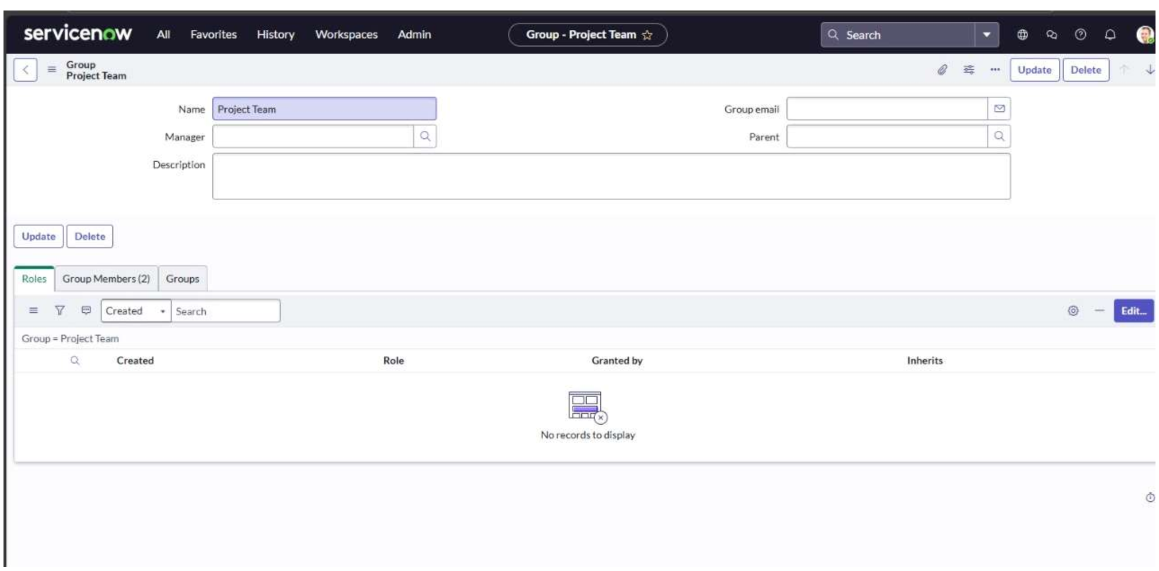
Activity 1:Assign users to project team group

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

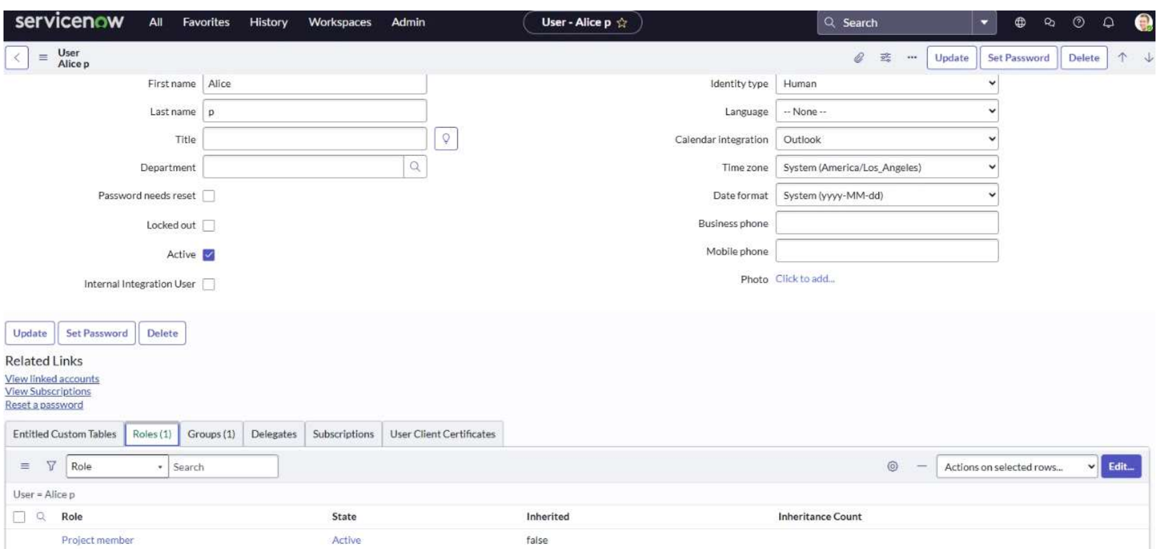




Milestone 6:Assign Roles To Users

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.



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

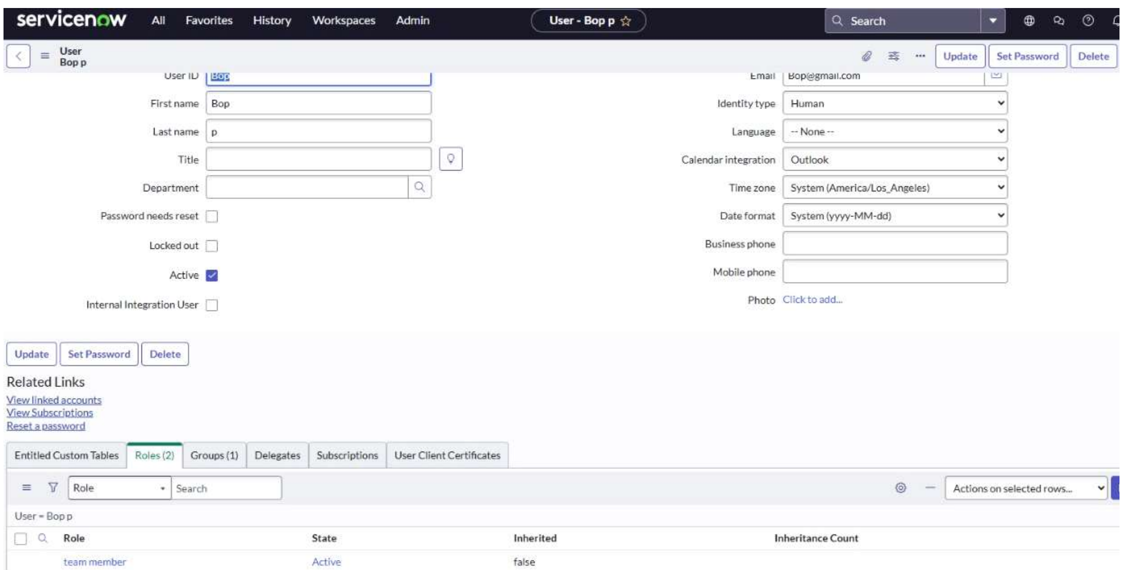
4. Under team member

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.



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

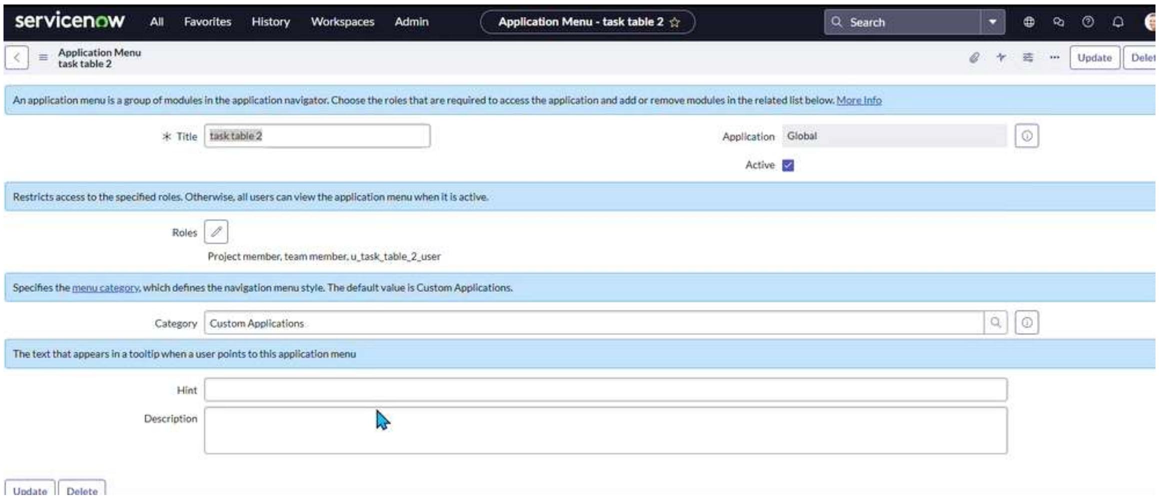
2. Go to application navigator search for search project table application

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



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

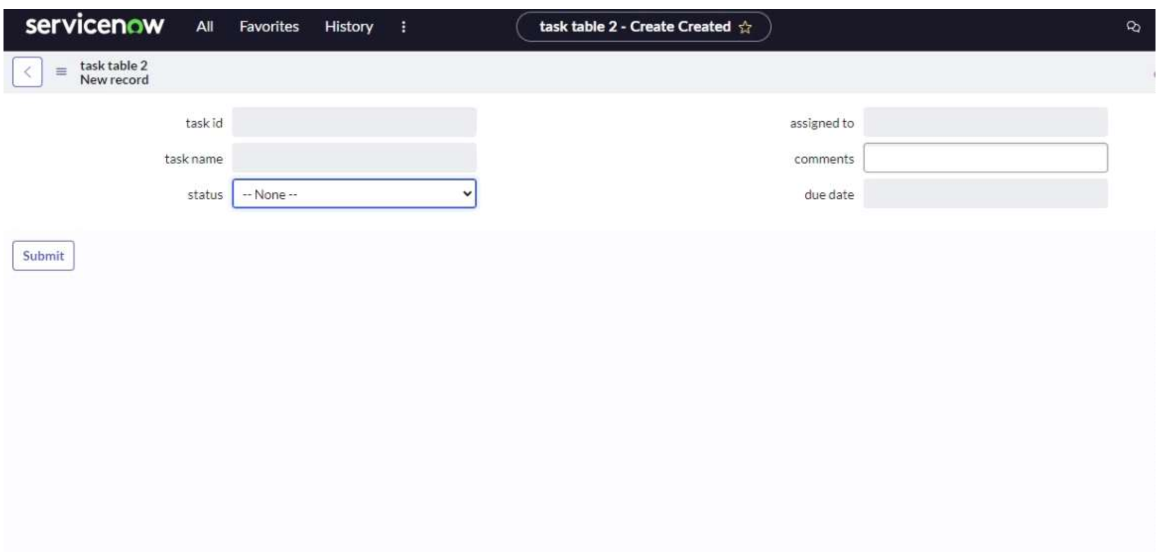
12. Click on profile on top right side

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



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

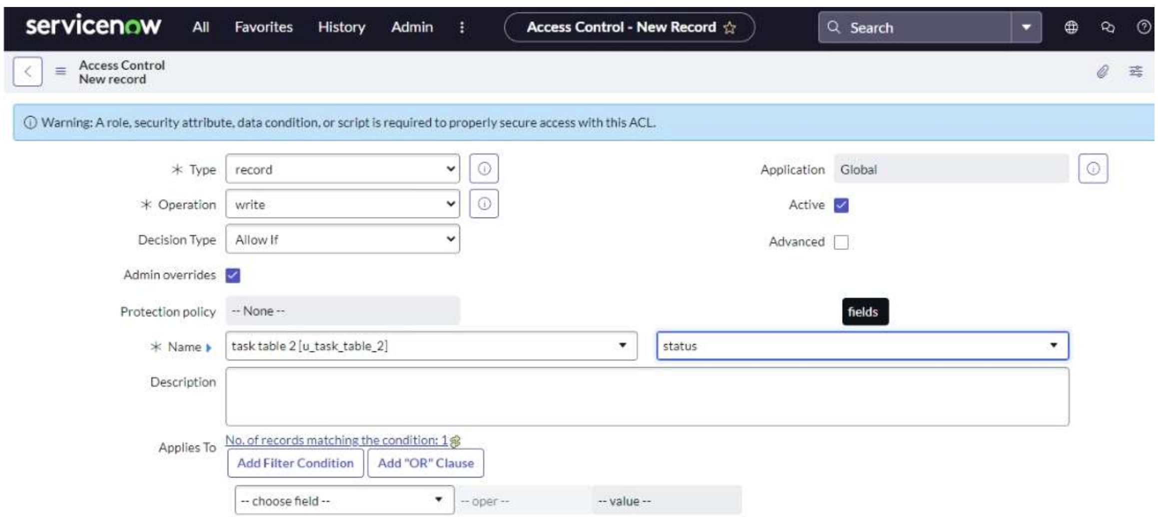
3.Click on Flow Designer under Process Automation.

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.

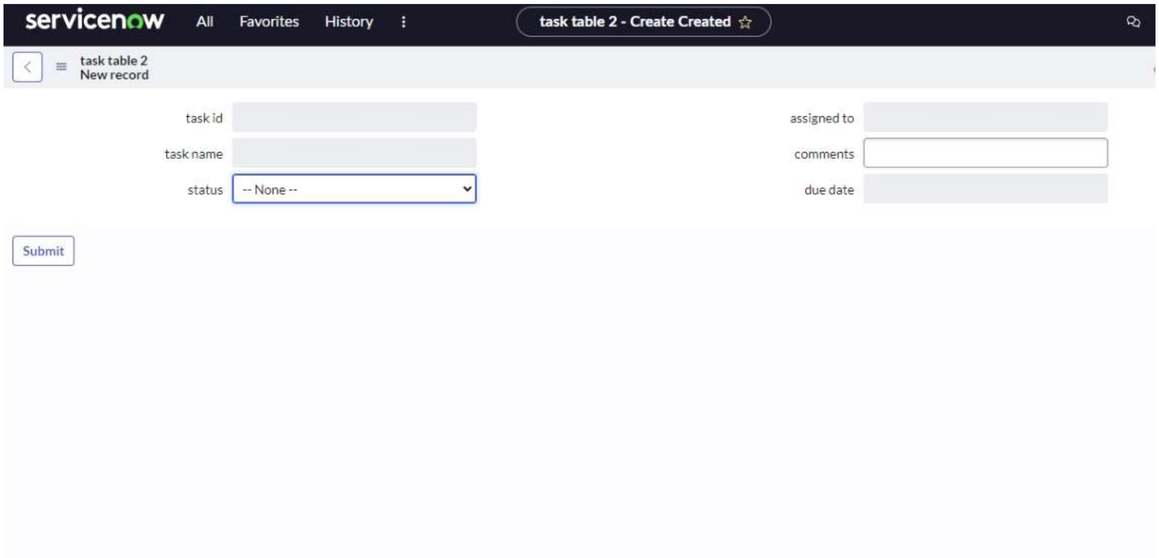
3.Give the table name as “ task table ”.

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.

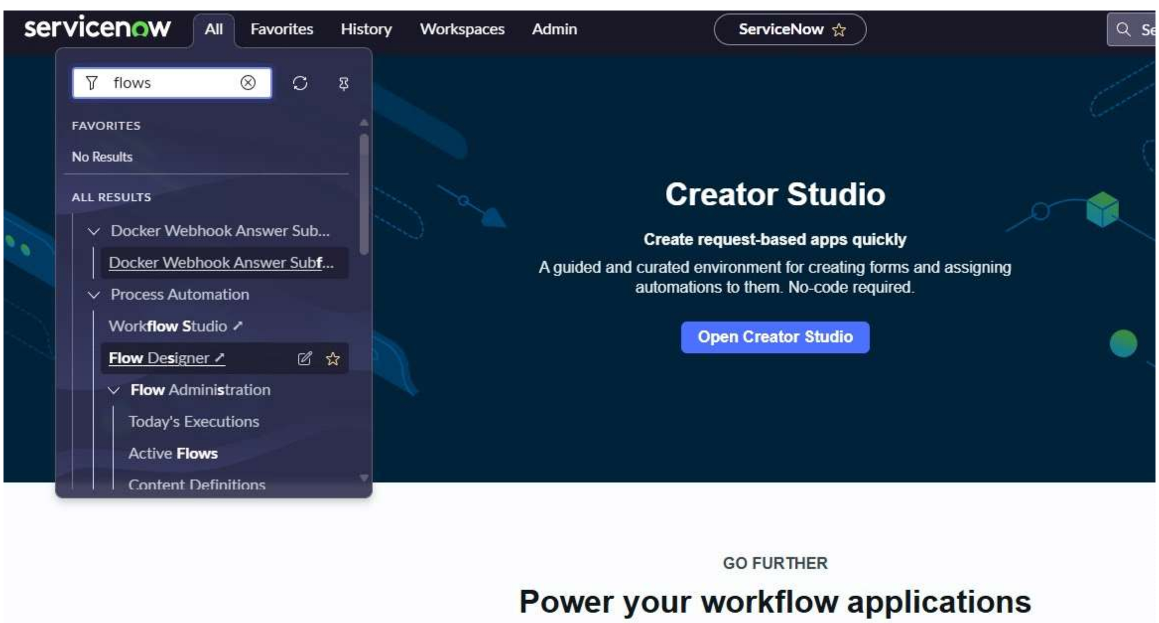
9.Go to application navigator search for task table.

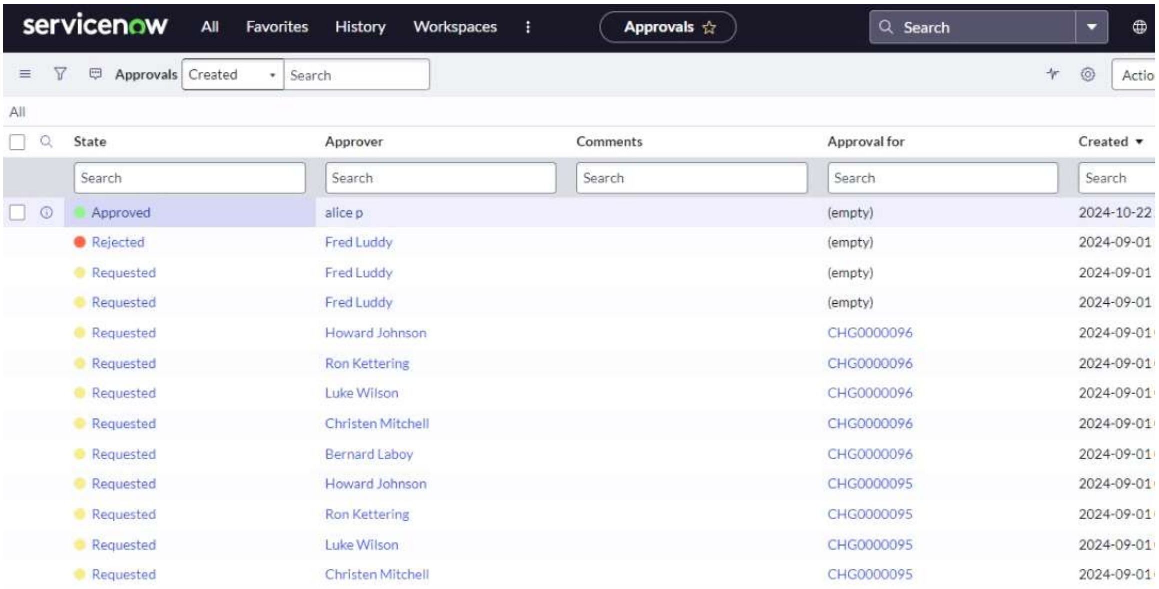
10.It status field is updated to completed

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	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 fix problem with task assignments and tracking progress. By using Servicenow, the system automates tasks,save time,and reduce mistakes.It setup roles for team members, assign them to groups,and control 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.