

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

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**Demo link:** [https://drive.google.com/file/d/11\\_O8jLDT5oW3YNN\\_Ban7eyBNBTi6Xs8/view?usp=sharing](https://drive.google.com/file/d/11_O8jLDT5oW3YNN_Ban7eyBNBTi6Xs8/view?usp=sharing)

# **ABSTRACT**

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# INTRODUCTION

## 1.1 Project Overview

Optimizing user, group, and role management with access control and workflows involves streamlining the processes for granting and managing user access to resources, ensuring security and efficiency. This can be achieved through implementing Role-Based Access Control (RBAC), utilizing workflows for access requests and approvals, and adopting a self-service model where **possible**.

## 1.2 Purpose

Optimizing user, group, and role management with access control and workflow integration enhances security, streamlines operations, and improves efficiency. By assigning roles with specific permissions based on job functions, organizations can minimize security risks, simplify audits, and improve user experience. This approach also enables efficient workflow management by aligning access with roles, reducing the need for individual access requests and speeding up processes.

## 2. IDEATION PHASE

### 1. Users

To create a user in ServiceNow, you need to navigate to User Administration, click the 'New' button, fill in the required user details (like User ID, Name, Email, and Password), and then assign appropriate roles. Finally, save the user record.

The screenshot shows the 'User - alice p' page in ServiceNow. The page is divided into two main sections: 'User Details' on the left and 'User Profile' on the right. The 'User Details' section includes fields for User ID (alice), First name (alice), Last name (p), Title, Department, Password needs reset, Locked out, Active (checked), Web service access only, and Internal Integration User. The 'User Profile' section includes fields for Email (alice@gmail.com), Language, Calendar integration (Outlook), Time zone (System (IST)), Date format (System (yyyy-MM-dd)), Business phone, Mobile phone, and Photo (Click to add...). Below these sections are tabs for 'Set Password' and 'Delete'. At the bottom, there are tabs for 'Related Links' (Linked accounts, Subscriptions, A password) and 'Used Custom Tables' (Roles, Groups, Delegates, Subscriptions, User Client Certificates).

## 2. Groups

To create a group in ServiceNow, navigate to User Administration > Groups, click New, and fill in the group details like name, description, and optionally, roles and members.

The screenshot shows the 'Group - Project team' page in ServiceNow. The page is divided into two main sections: 'Group Details' at the top and 'Group Members' below. The 'Group Details' section includes fields for Name (Project team), Group email, Manager, Parent, and Description. Below these fields are 'Update' and 'Delete' buttons. The 'Group Members' section has tabs for 'Roles', 'Group Members', and 'Groups'. The 'Group Members' tab is active, showing a search bar and a table with the header 'User'. The table is currently empty, displaying 'No records to display'.

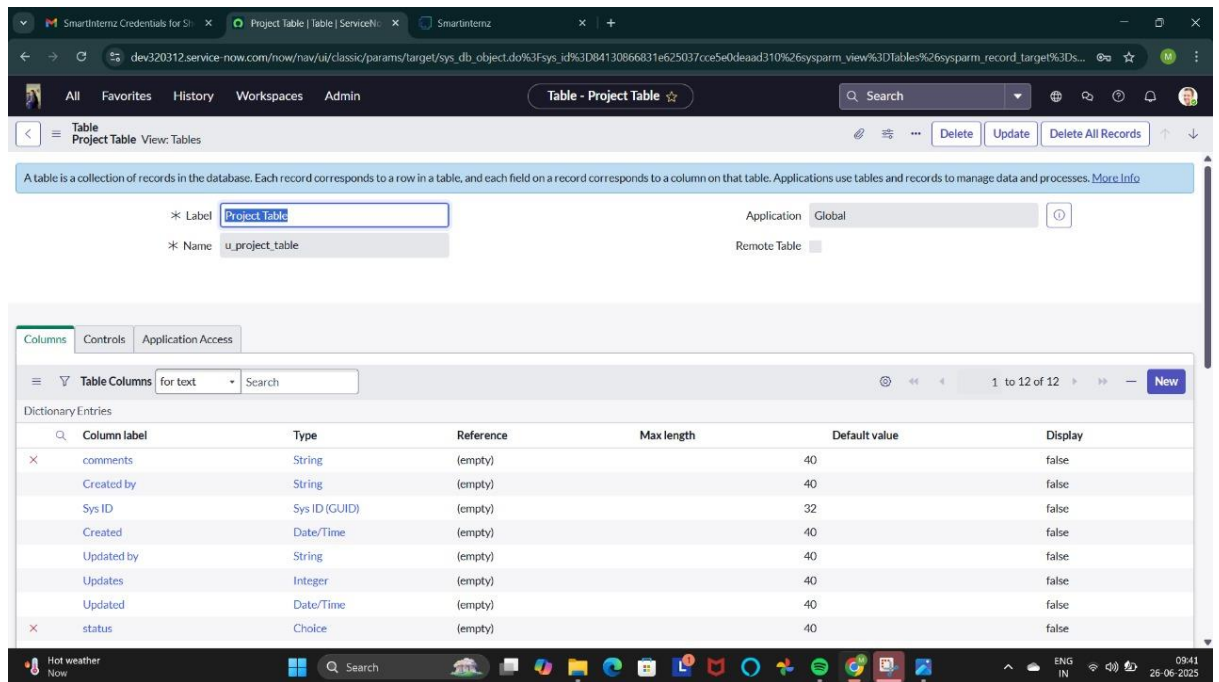
## 3. Roles

To create a role in ServiceNow, navigate to User Administration > Roles and click New. Fill out the role form, including a unique name, and optionally assign it to a specific application scope. You can also add existing roles to the new role using the "Contains Role" field. Once created, you'll need to assign the role to users or groups and configure access control rules (ACLs) to define what actions the role can perform.

The screenshot shows the ServiceNow 'Role - Project member' form. The 'Name' field is filled with 'Project member'. The 'Application' dropdown is set to 'Global'. The 'Elevated privilege' checkbox is unchecked. The 'Description' field is empty. Below the form, there are tabs for 'Contains Roles', 'Applications with Role', 'Modules with Role', and 'Custom Tables'. The 'Contains Roles' tab is active, showing a search bar and a table with the header 'Role - Project member' and a sub-header 'Contains'. The table is currently empty, displaying 'No records to display'.

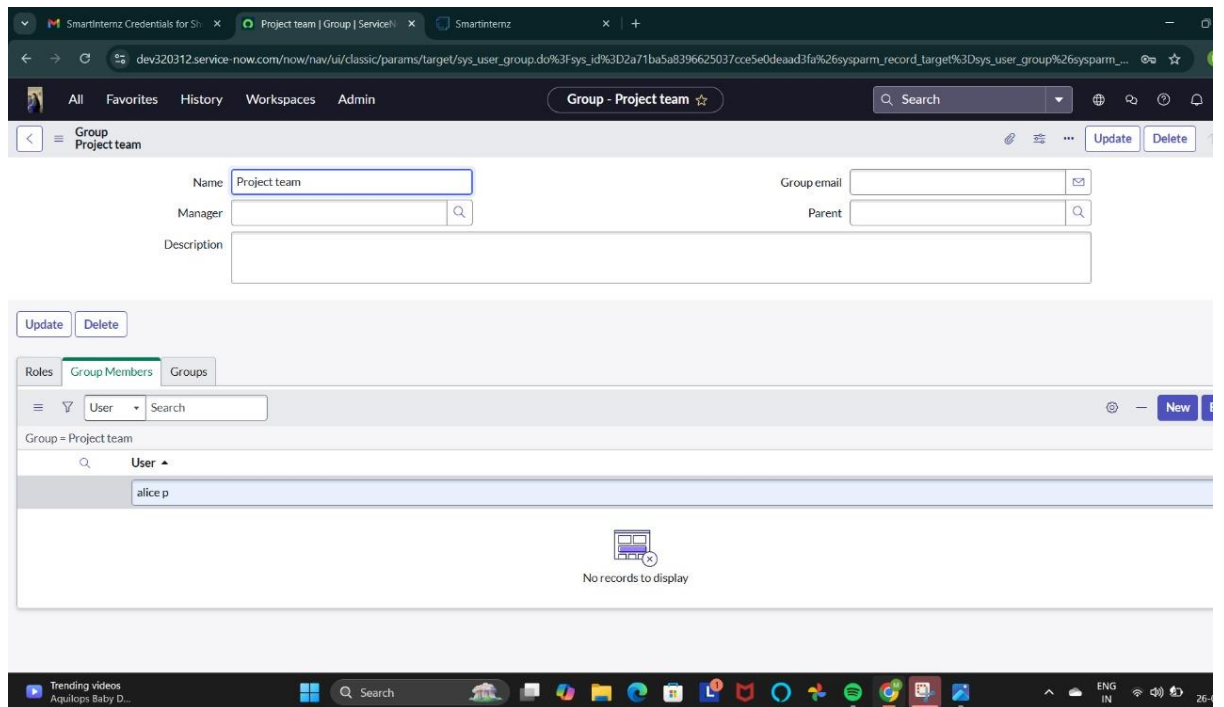
#### 4. Tables

Create a table · Navigate to All > System Definition > Tables. · Select New. · On the form, fill in the fields. · In the Columns section, use the Table Columns ...



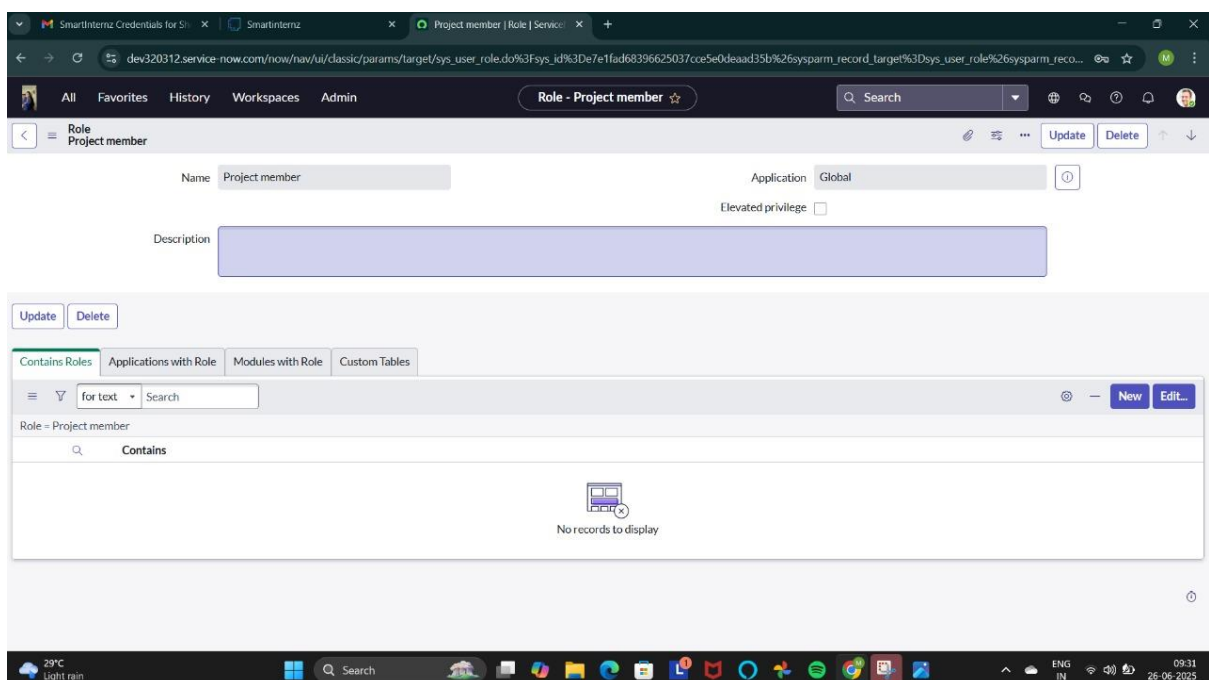
## 5. Assign Users to Groups

To add users to groups in ServiceNow, navigate to User Administration > Groups, select the desired group, go to the Group Members tab, and click Edit. Then, search for the user in the collection and move them to the group using the slushbucket, finally clicking Save.



## 6. Assign Roles to Users

To assign roles to users in ServiceNow, navigate to User Administration > Users, select the user, and then use the "Edit" button on the "Roles" related list to add or remove roles. You can either search for the desired role or select it from the list.



## 7. Application Access

In ServiceNow, application access for users is managed through a combination of roles, application menus, and Access Control Lists (ACLs). Users are granted access to applications based on the roles assigned to them, which are then linked to specific application menus and the underlying data accessed via tables.

The screenshot shows the 'Application Menu - Project table' configuration page in ServiceNow. The page includes a header with navigation tabs (All, Favorites, History, Workspaces, Admin) and a search bar. The main content area has a title field set to 'Project Table', an application dropdown set to 'Global', and an 'Active' checkbox checked. Below this, there is a section for 'Roles' with a 'Project member' role assigned. A 'Category' dropdown is set to 'Custom Applications'. At the bottom, there are fields for 'Hint' and 'Description'. The page also features 'Update' and 'Delete' buttons. The footer shows the user's name 'Shubhanshu Sh...' and the date '26-06-2025'.

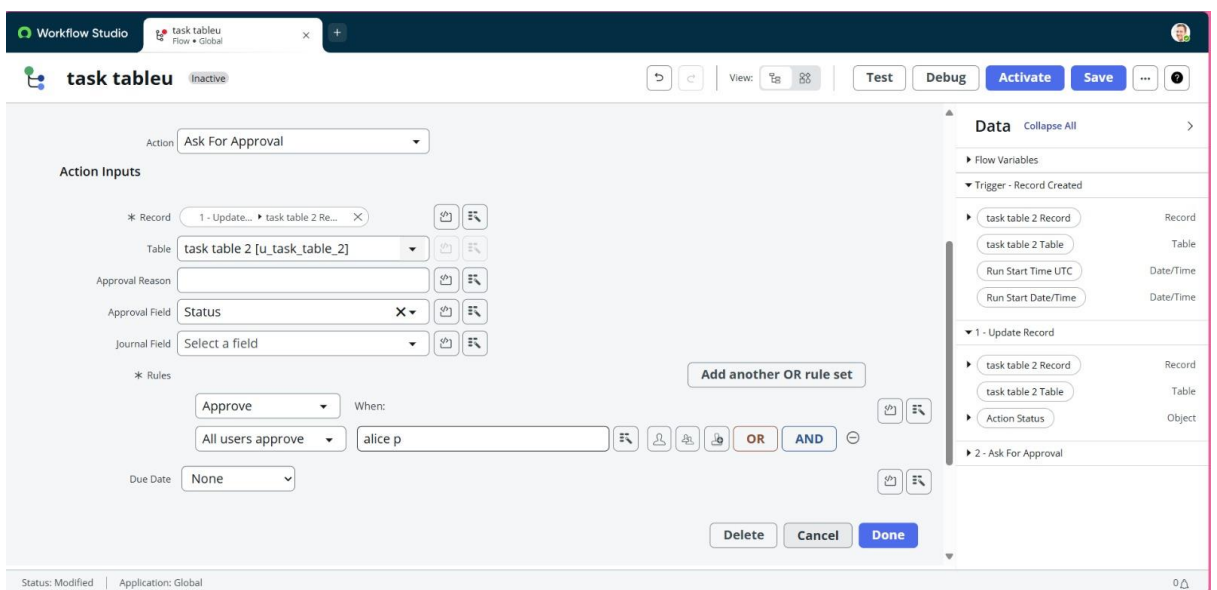
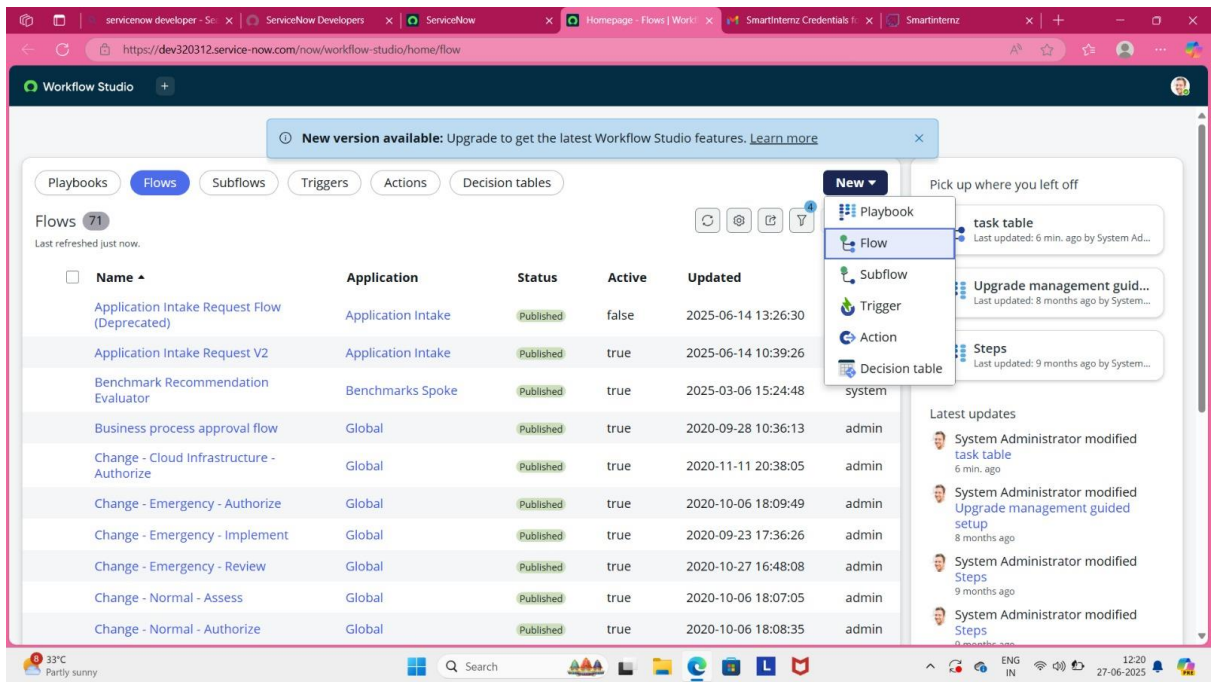
## 8. Access Control

In ServiceNow, an Access Control List (ACL) is a security mechanism that controls user access to platform resources, including tables, records, and fields. ACLs define which users, groups, or roles can access specific data and perform certain operations, such as reading, writing, creating, or deleting. They are crucial for ensuring data security and restricting access to sensitive information.

## 9. Flow

Flow Designer in ServiceNow is a powerful tool that allows users to automate business processes without writing code. It provides a user-friendly, drag-and-drop interface that helps in designing workflows by chaining actions, conditions, and steps together to achieve complex process automation.





## 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.