FUNCTIONAL AND PERFORMANCE TESTING

PROJECT NAME : Optimizing User, Group, and Role Management with Access Control and Workflows

Milestone : Workflow

Purpose

The purpose of this project is to establish a **structured and efficient system for managing tasks** within a small project management team consisting of a Project Manager (Alice) and a Team Member (Bob).

Currently, the absence of clear roles, access controls, and workflows leads to confusion, duplication of efforts, and delays. By defining roles, introducing role-based access control, and implementing workflow automation, the project aims to:

- Ensure **clarity in task assignments** and responsibilities.
- Improve **accountability and transparency** in project execution.
- Provide **real-time visibility** into task status and progress.
- Enhance **team collaboration and communication**.
- Optimize the overall **efficiency and productivity** of the project lifecycle.

Uses

1. **Task Assignment and Tracking**
    - Allows the Project Manager to assign tasks clearly to team members.
    - Enables Team Members to view and update their assigned tasks.
2. **Accountability and Transparency**
    - Each task has a defined owner, reducing confusion and ensuring responsibility.

- Task history provides an audit trail for monitoring progress.

3. Workflow Automation

- Automates notifications for task assignments, updates, and completions.
- Minimizes manual follow-ups and delays.

4. Access Control Management

- Restricts access based on roles (e.g., only the Project Manager can assign tasks).
- Ensures security by preventing unauthorized changes.

5. Progress Monitoring

- Real-time dashboards give the Project Manager a complete overview of task status.
- Helps identify bottlenecks and overdue tasks quickly.

6. Improved Collaboration

- Provides a structured communication channel between Project Manager and Team Member.
- Reduces dependency on scattered tools like emails or chats.

7. Scalability for Larger Teams

- While designed for a small team, the system can easily scale to handle multiple members and projects.

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
7. Create one more user:
8. Create another user with the following details
9. Click on submit

Activity-2

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

Activity-3:

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

Activity-4:

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

Create one more table:

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

Activity-5:

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

Activity-6:

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.

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.

Activity-7:

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

Activity-8:

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
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

Activity-9:

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.

1. Go to application navigator search for task table.
2. It status field is updated to completed
3. Go to application navigator and search for my approval
4. Click on my approval under the service desk.
5. Alice p got approval request then right click on requested then select approved

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.