**TITLE**

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

**Team Id: NM2025TMID14618**

**Team Leader: AKASH V**

**Team Members**

**Team Member 1: Venkatesh.K**

**Team Member 2: Dinesh kumar.S**

**Team Member 3: Datchinamoorthy.P**

**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 structured workflows, which leads to confusion around task assignments and progress tracking.**

**Objectives**

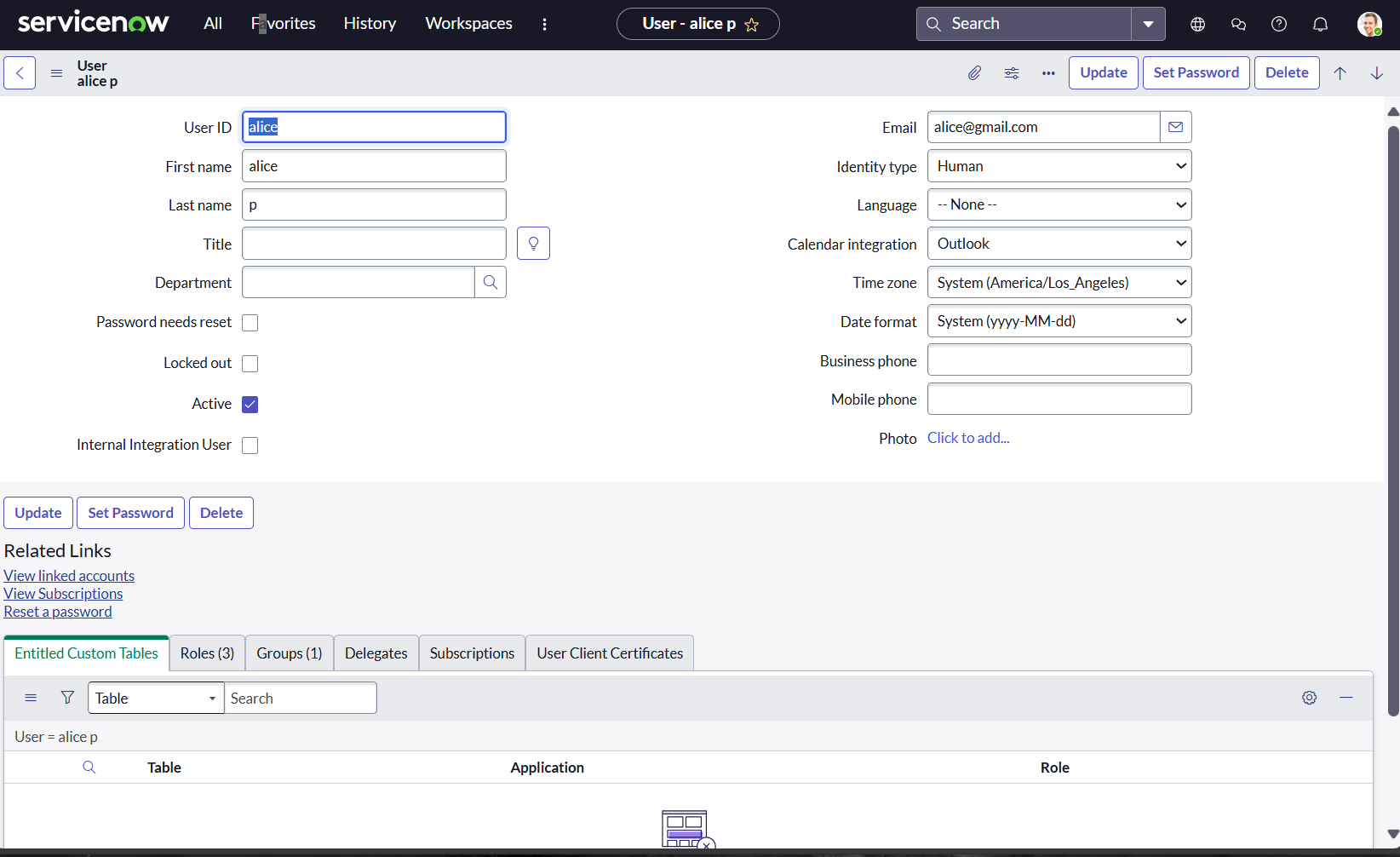
1. **Define User Roles Clearly – Establish distinct roles for Alice (Project Manager) and Bob (Team Member) to ensure clarity in responsibilities and access rights.**
2. **Implement Access Control Mechanisms – Restrict Bob’s access to project creation and editing features while allowing him to update his assigned tasks.**
3. **Streamline Workflow Processes – Develop a structured workflow so Alice can easily assign tasks to Bob and monitor their completion.**

**Key Skills: Users, Groups, Roles, Tables, Access Control List (ACL), Flow Designer**

**TASK INITIATION**

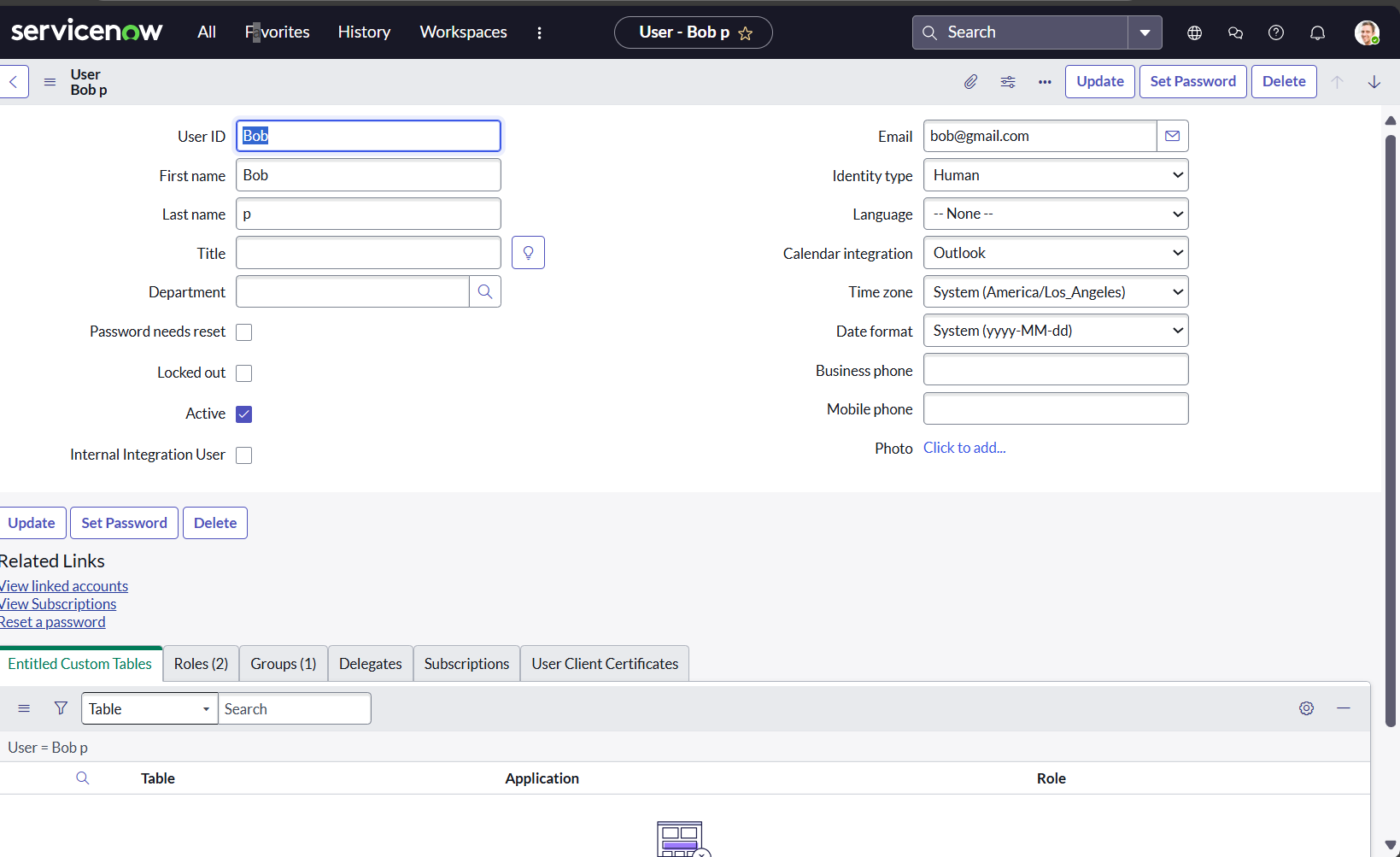
**Milestone 1 : Users**

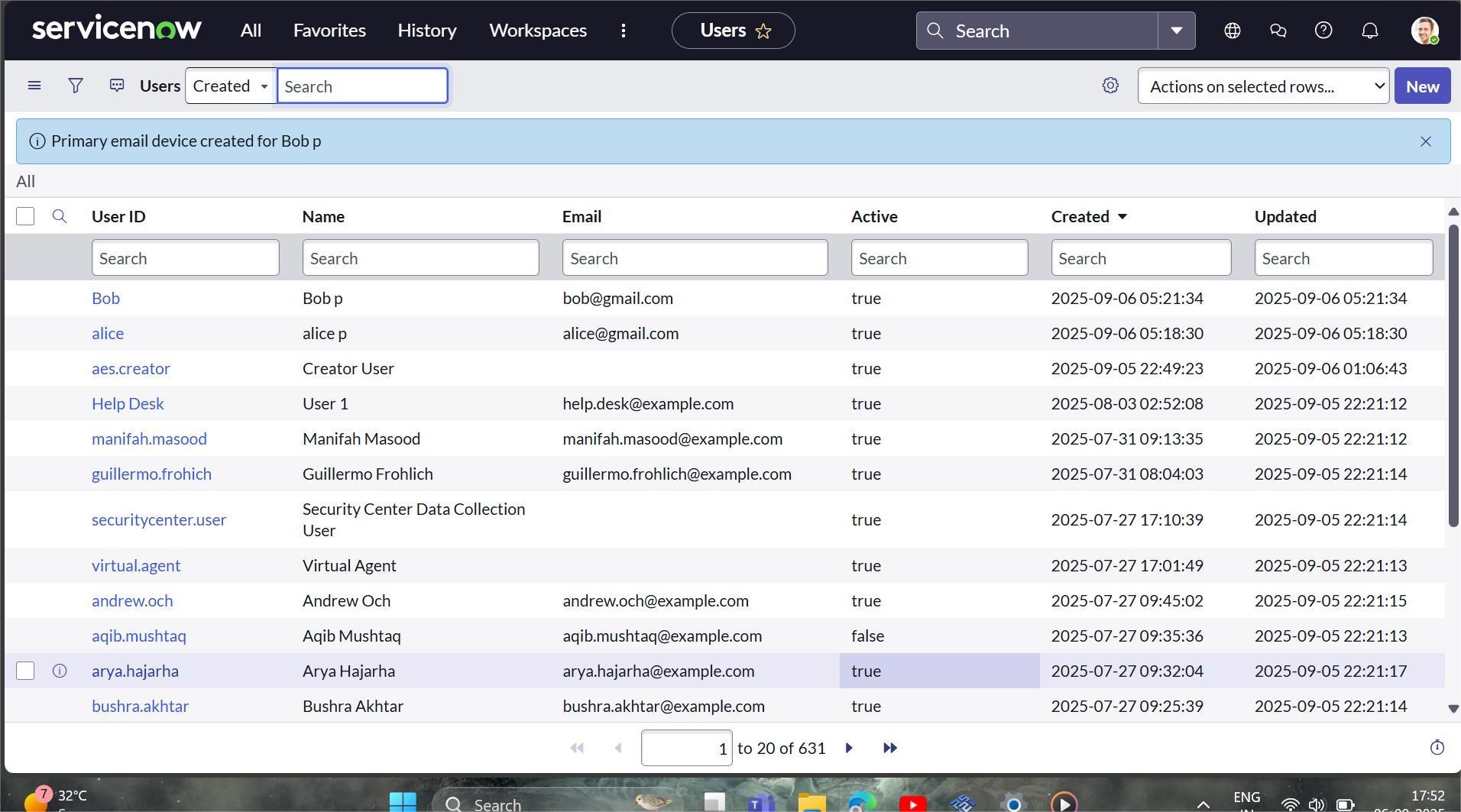
**Activity 1:** **Create Users**

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.

**Create one more user:**

1. Create another user with the following details
2. Click on submit

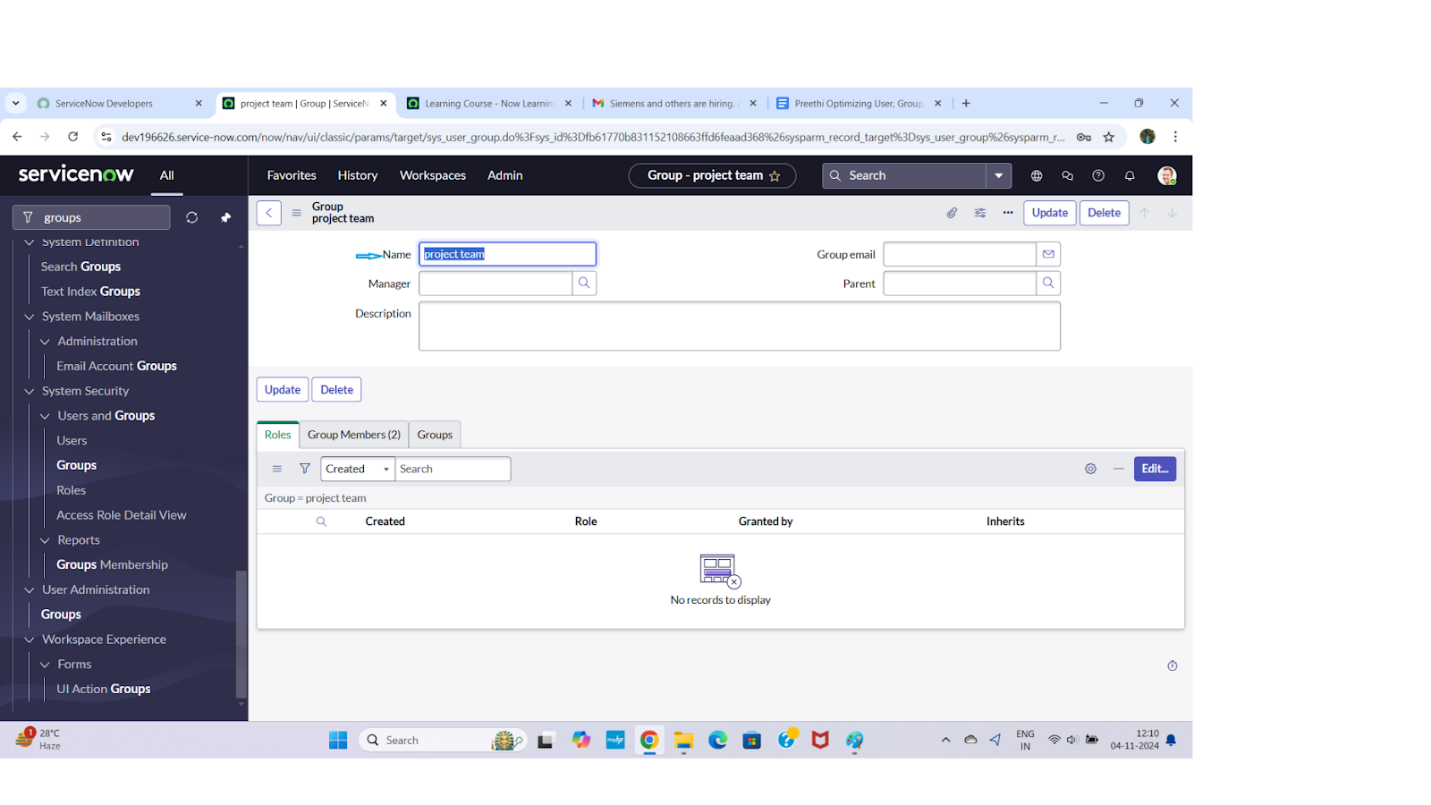




**Milestone 2 : Groups**

**Activity 1:** **Create Groups**

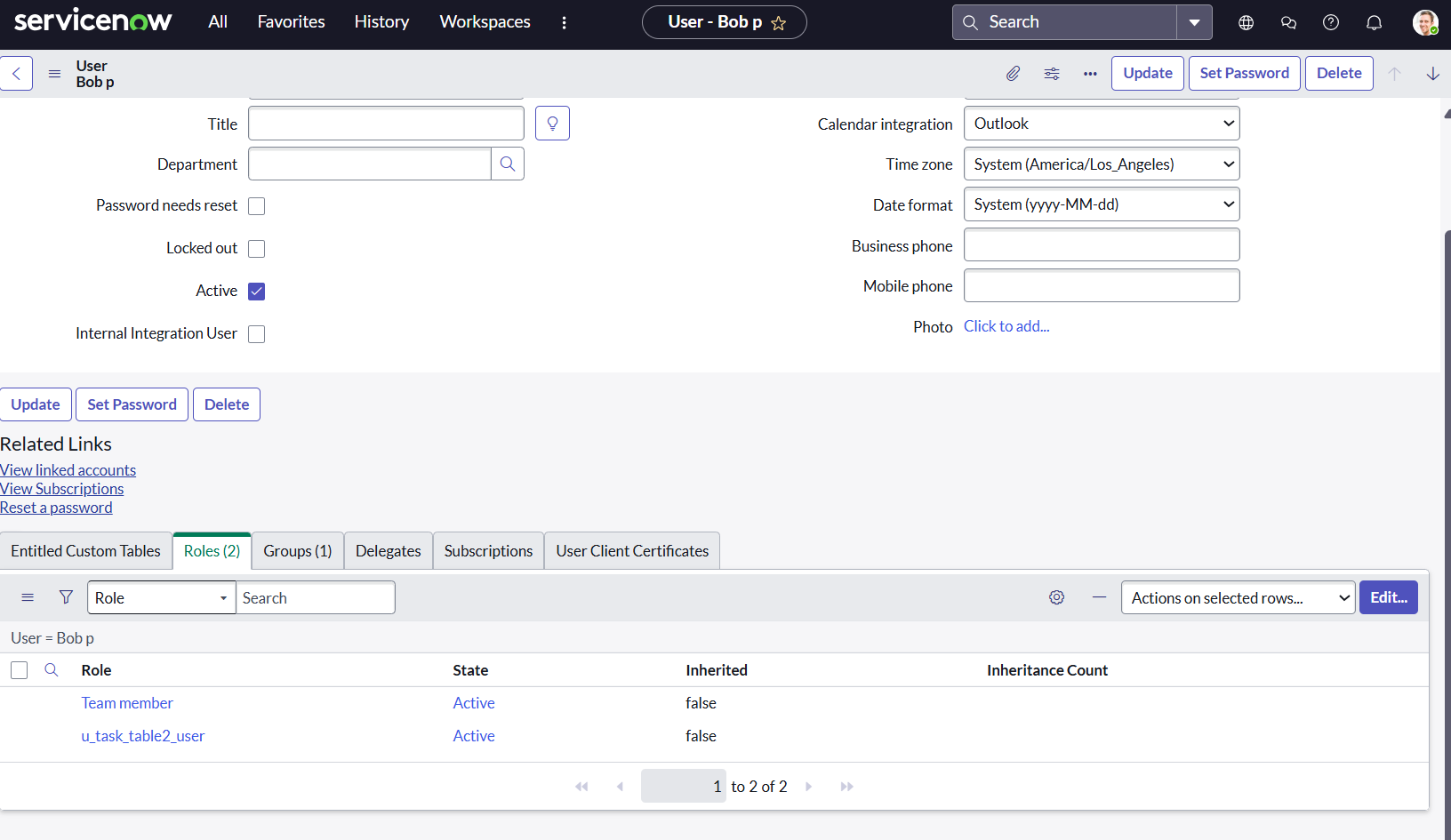
1. Open service now.
2. Click on All  >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



**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:**

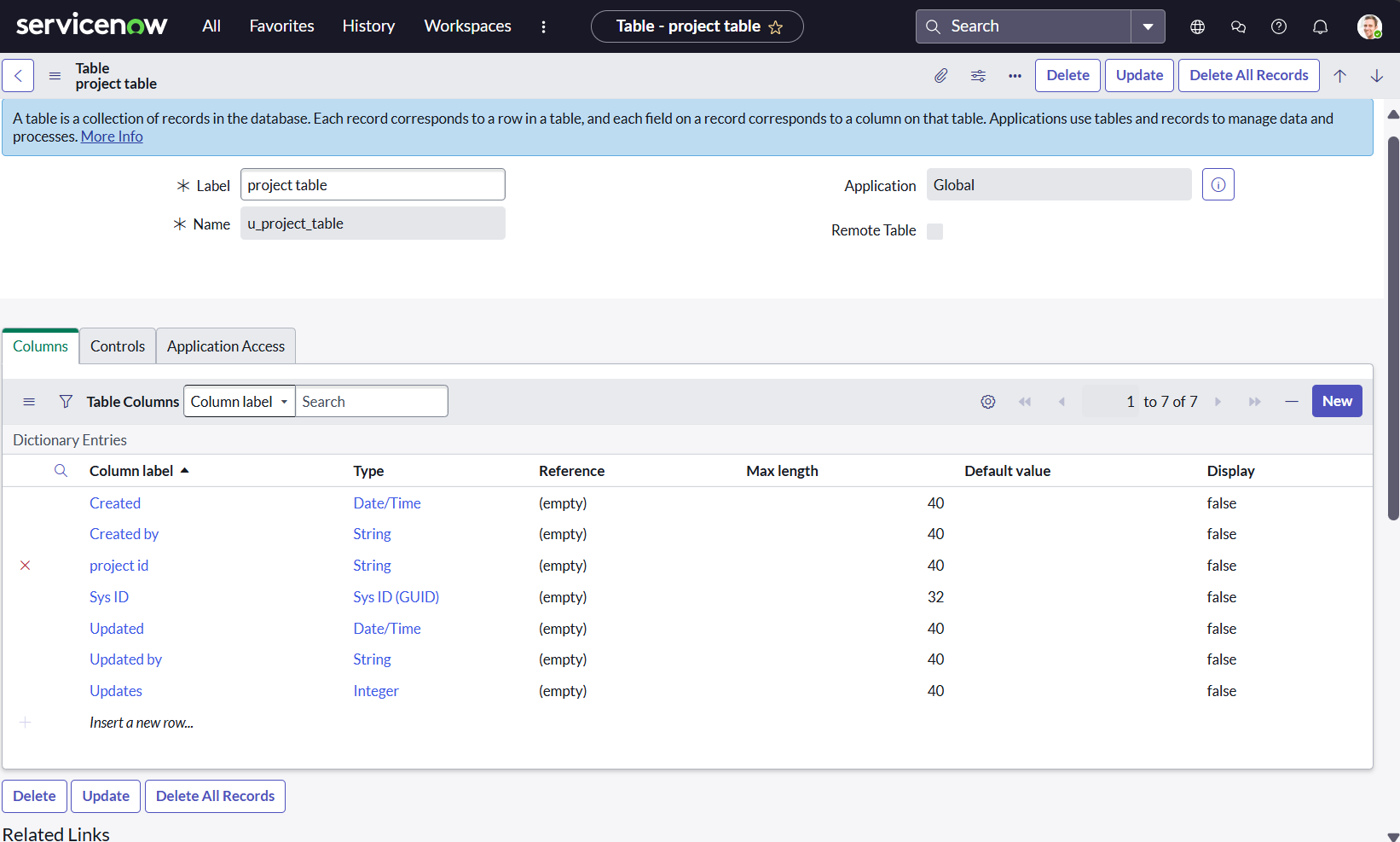
             7.Create another role with the following details

             8.Click on submit

**Milestone 4 : Table**

**Activity 1:** **Create Table**

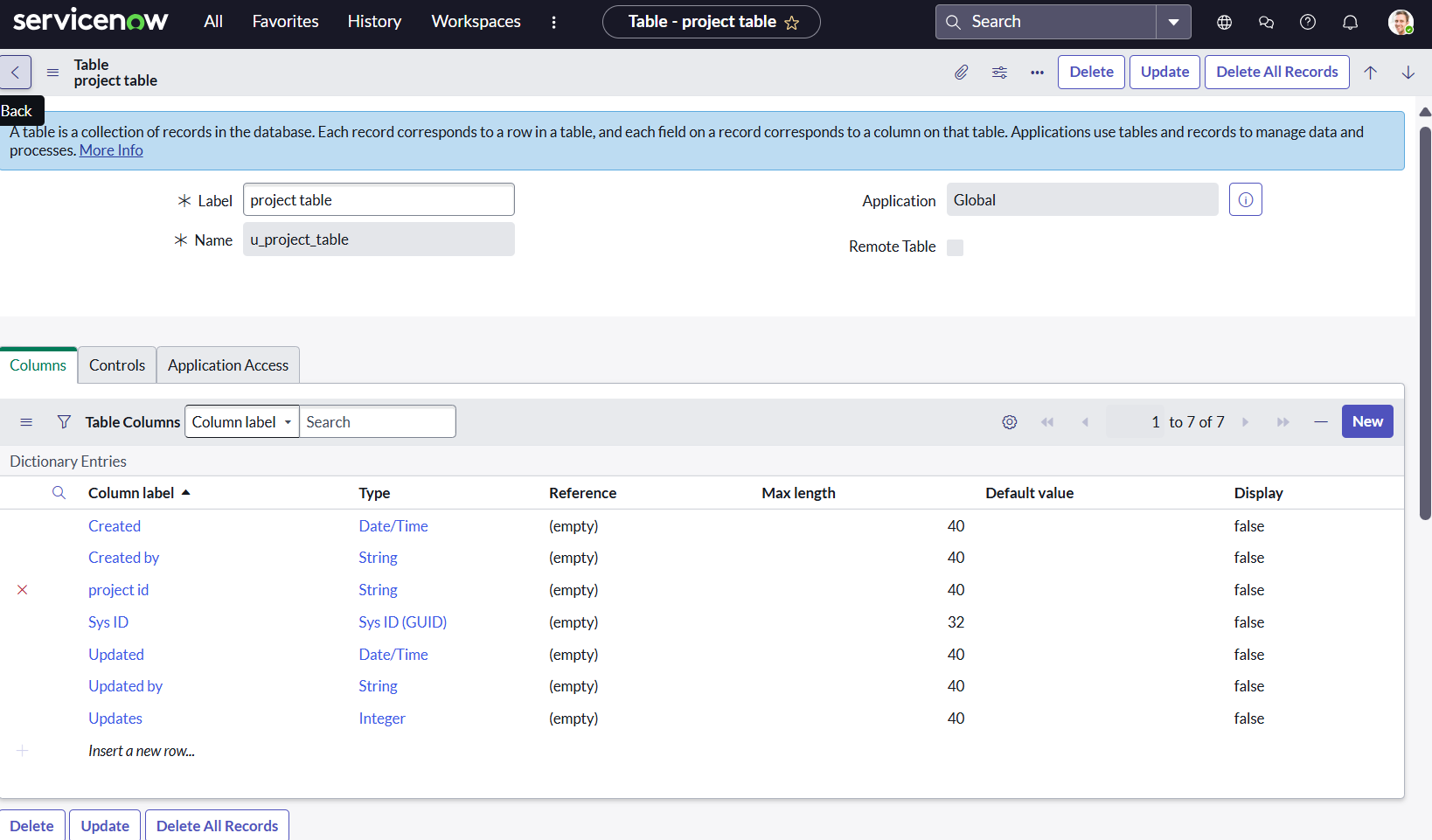
1. Open service now.
2. Click on All  >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table  
   Label : project table  
   Check the boxes Create module & Create mobile module
6. Under new menu name : project table
7. Under table columns give the columns
8. Click on submit



**Create one more table:**

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

   10. Click on submit.



**Milestone 5 : Assign  users to groups**

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

1.Open service now.

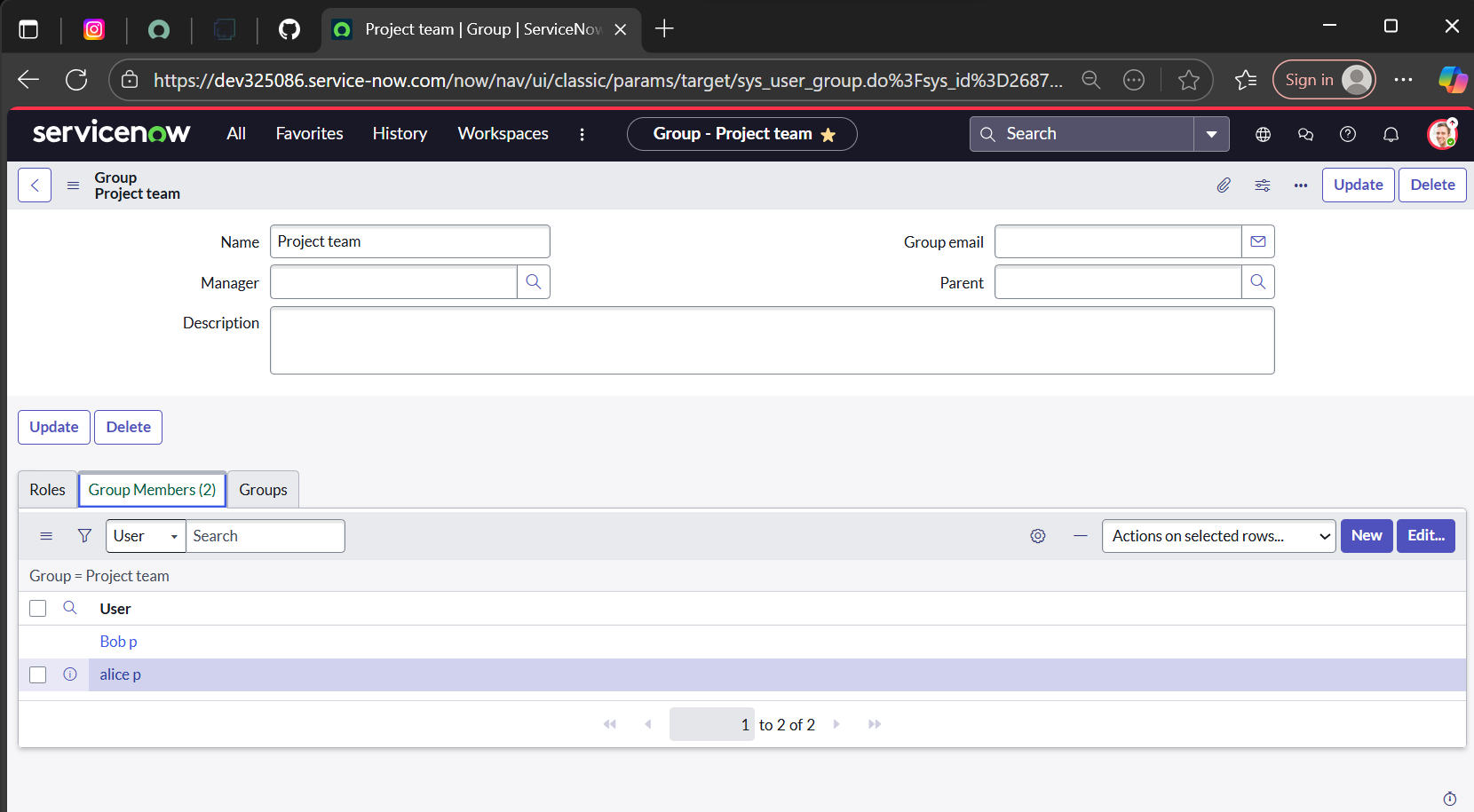
2.Click on All  >> search for groups

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

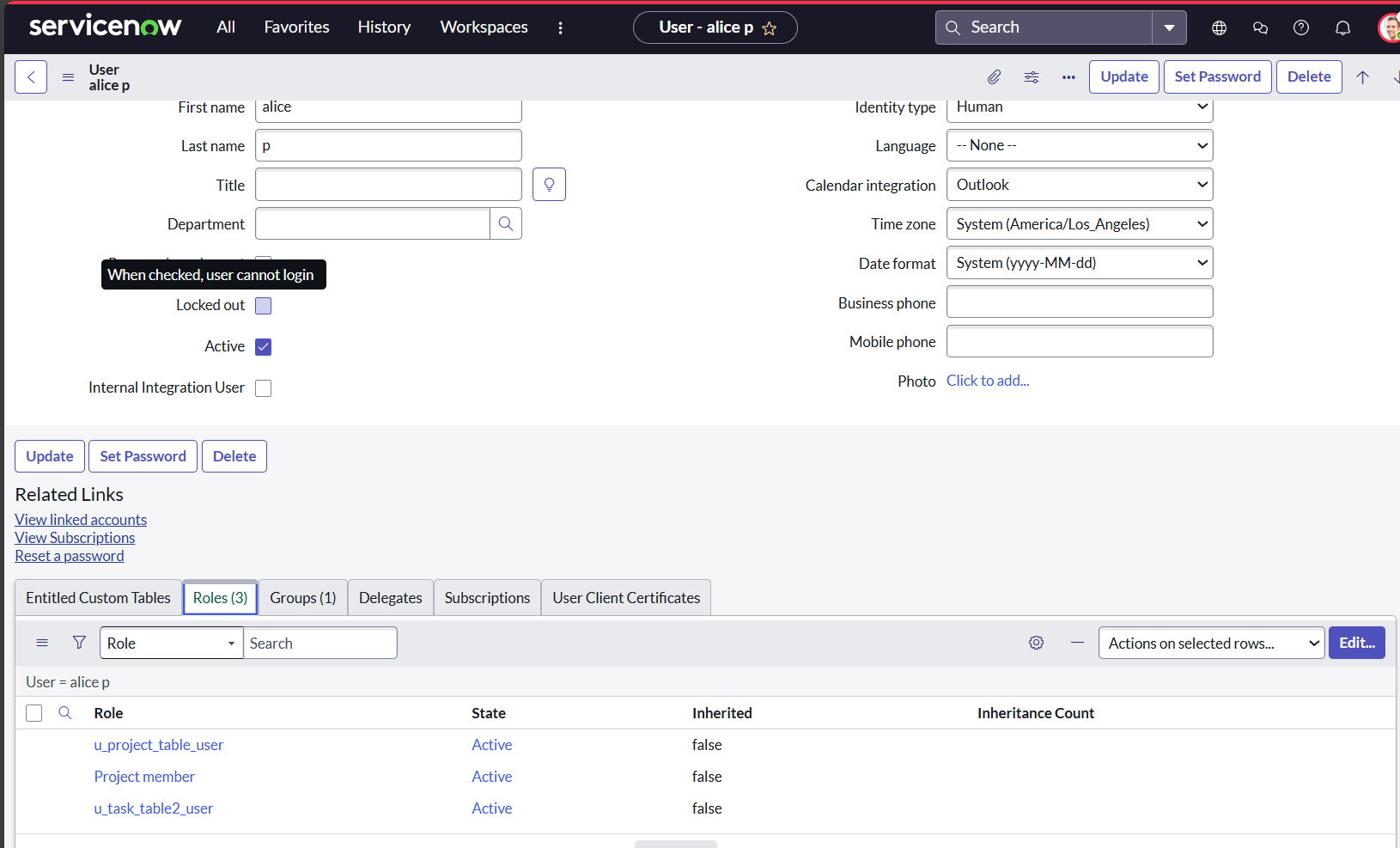
      4.Under project manager

      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.



**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

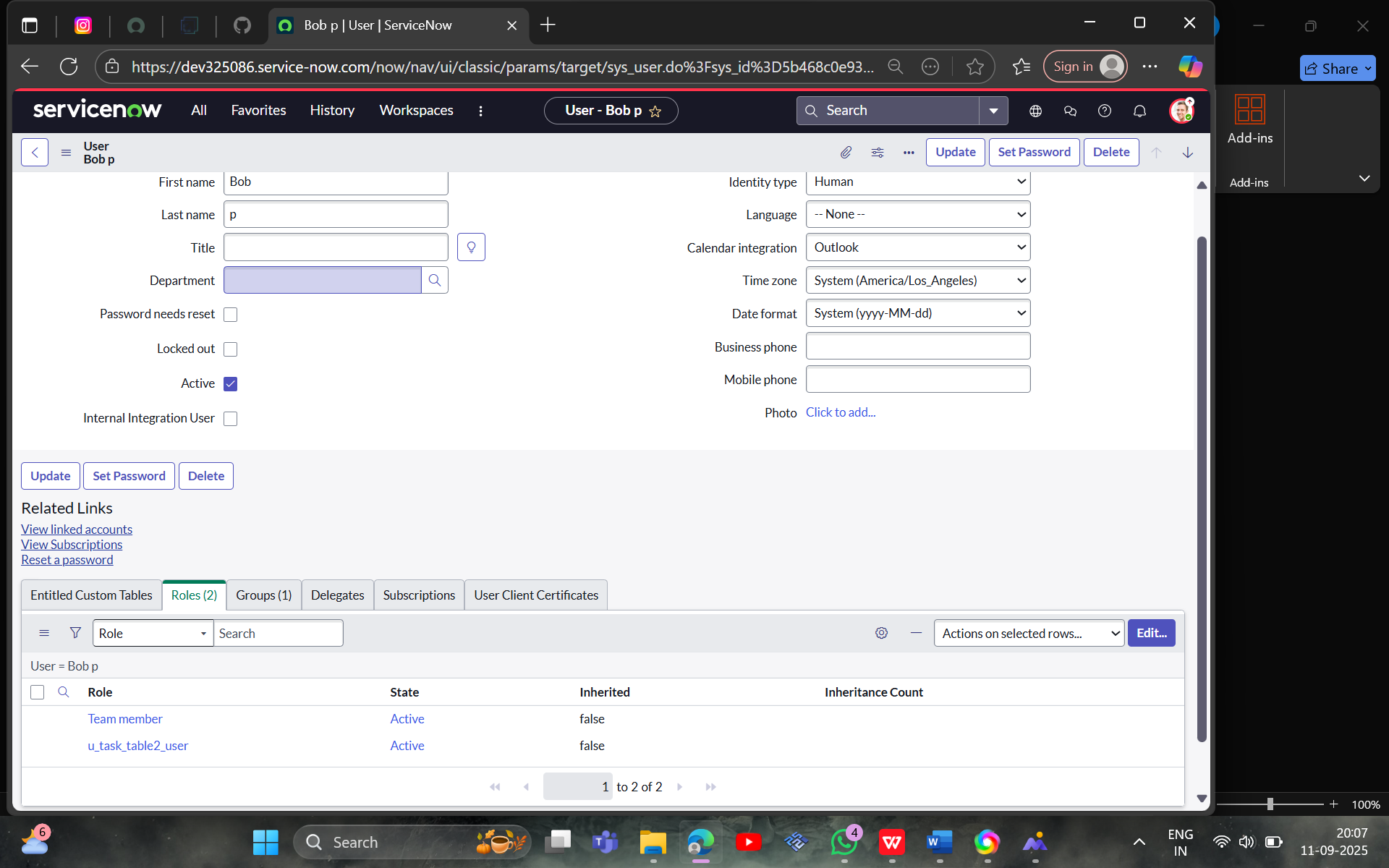
      4.Under team member

      5.Click on edit

      6.Select team member and give table role  and save

      7. Click on profile icon Impersonate user to bob

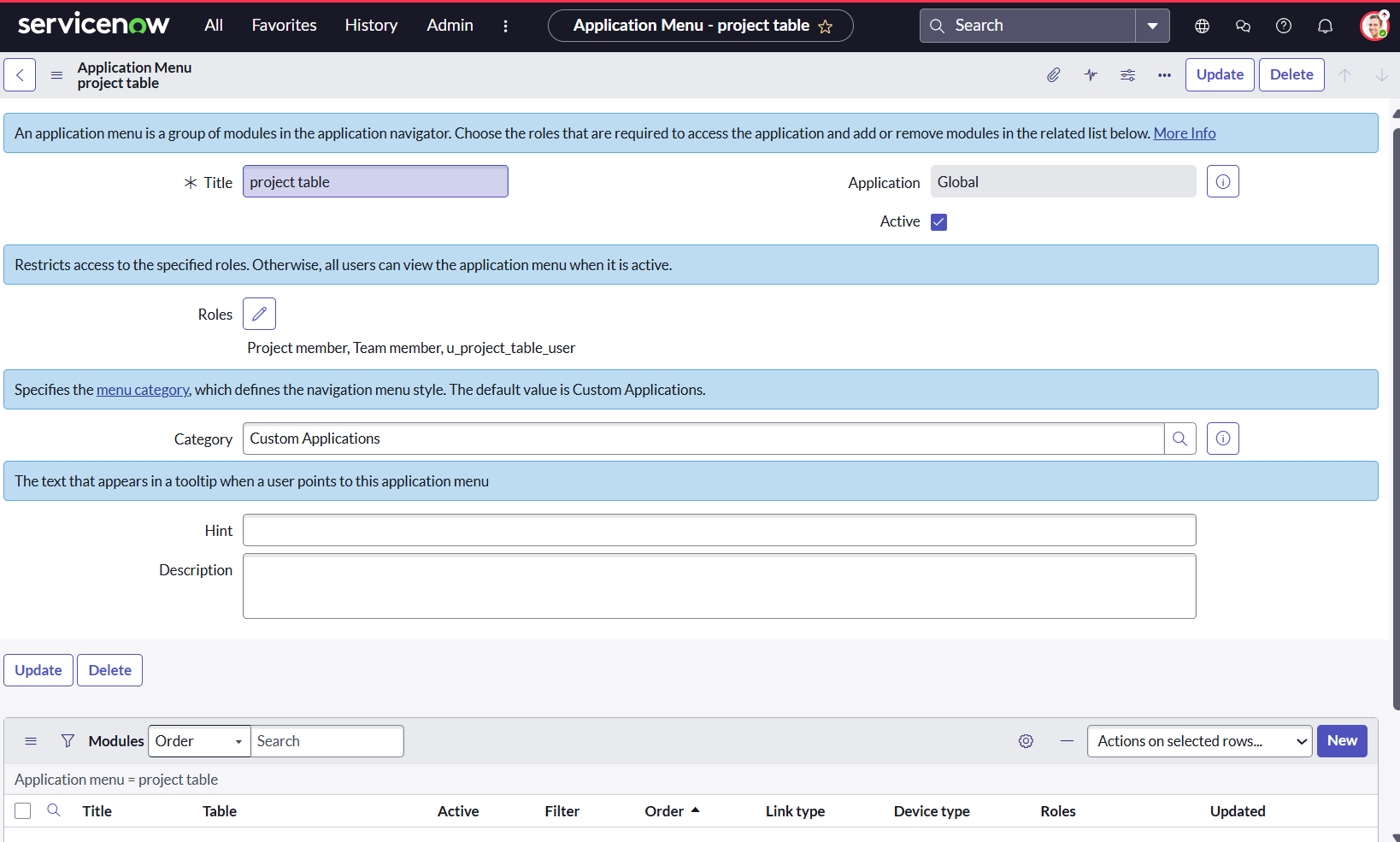
      8. We can see the task table2.

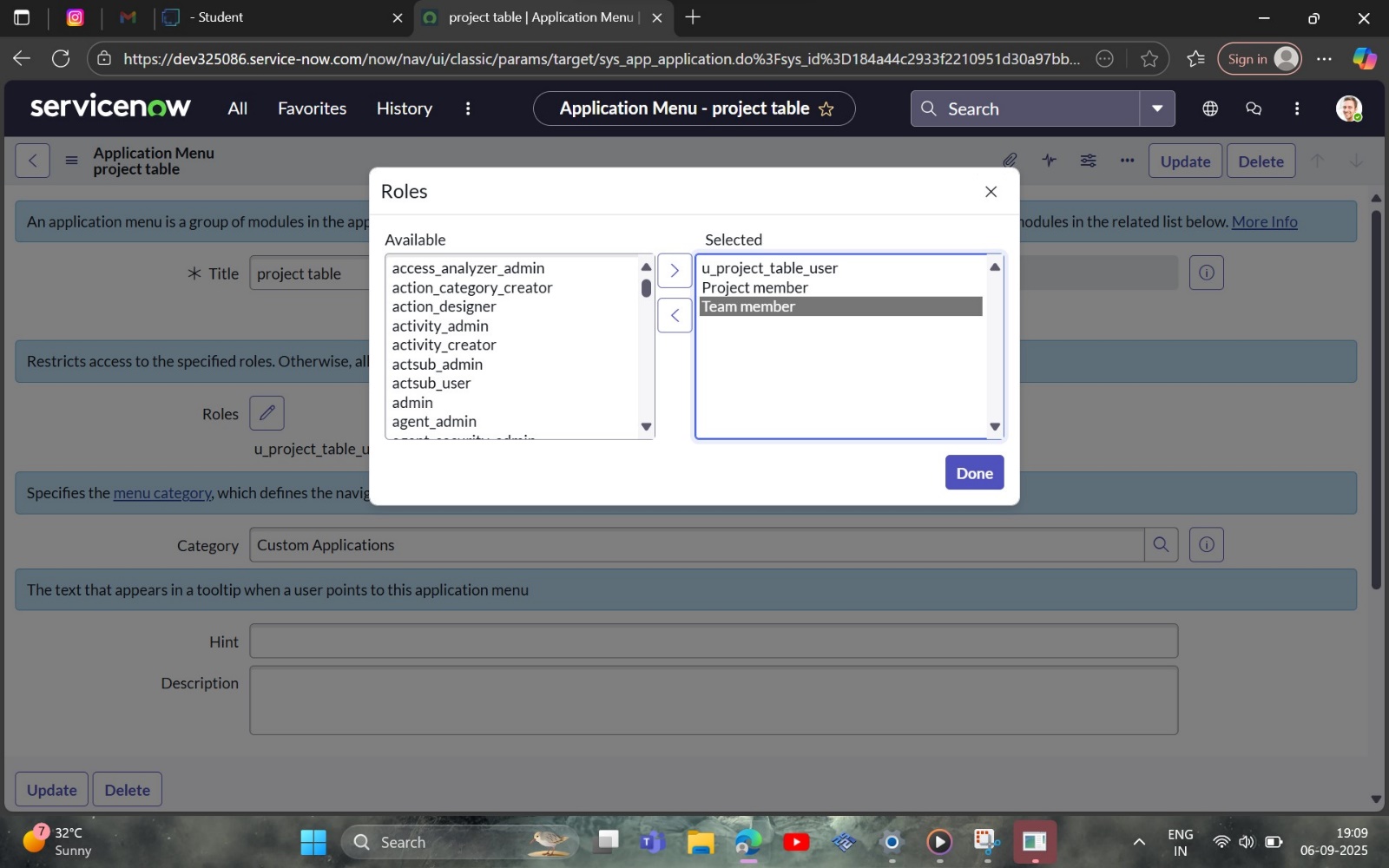


**Milestone 7 : Application access**

**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

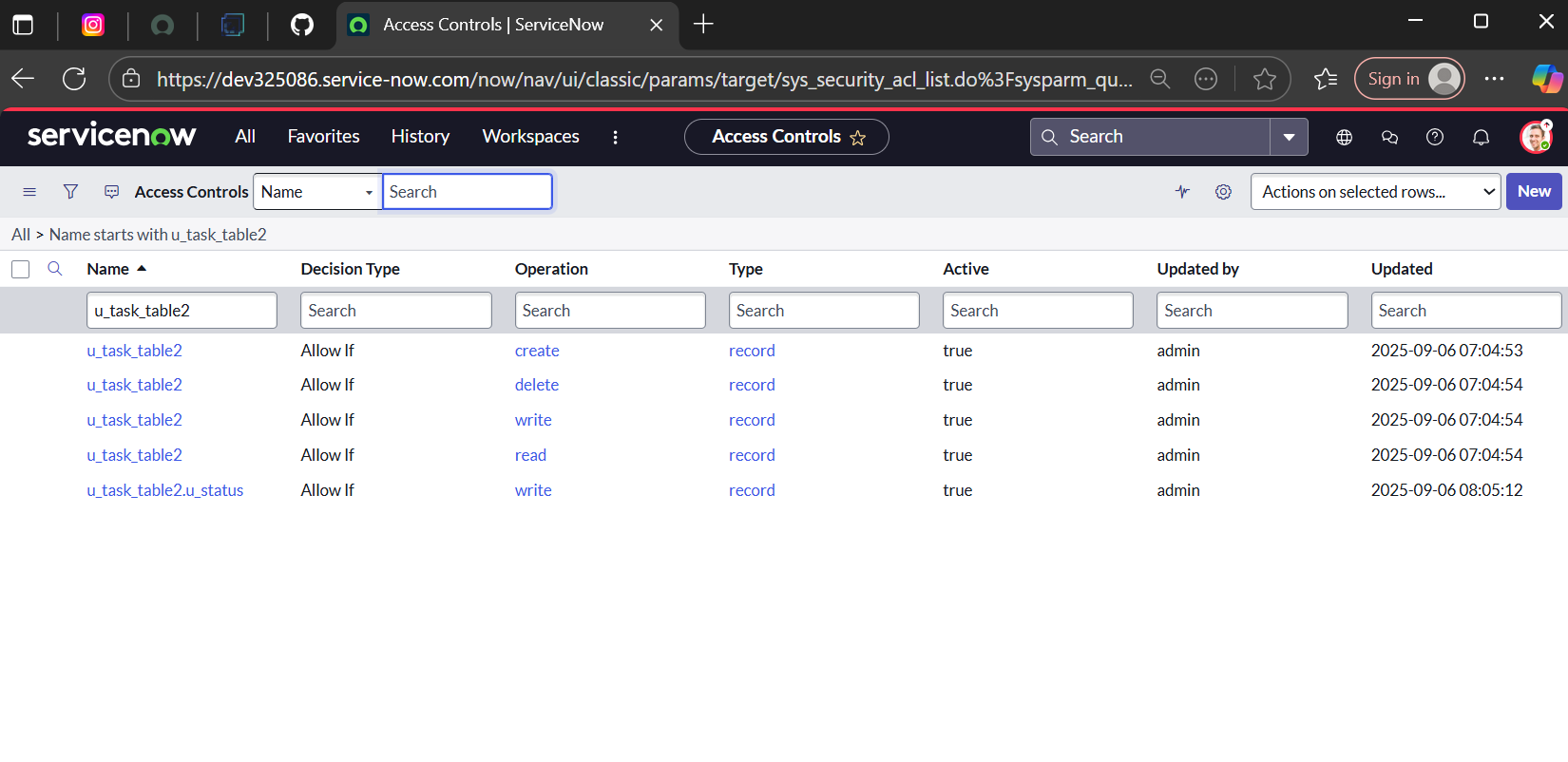




**Milestone 8 :Access control list**

**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



 12.Click on profile on top right side

      13.Click on impersonate user

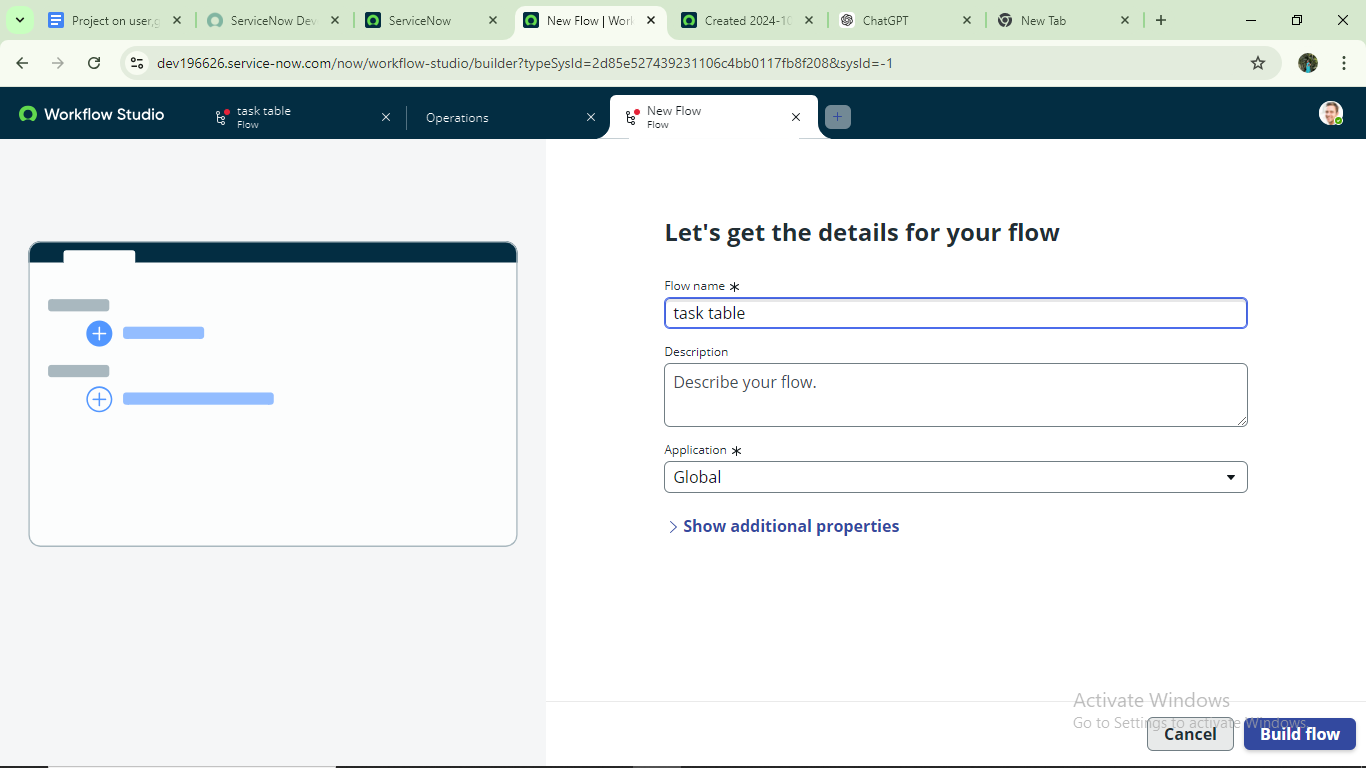
      14.Select  bob user

      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.



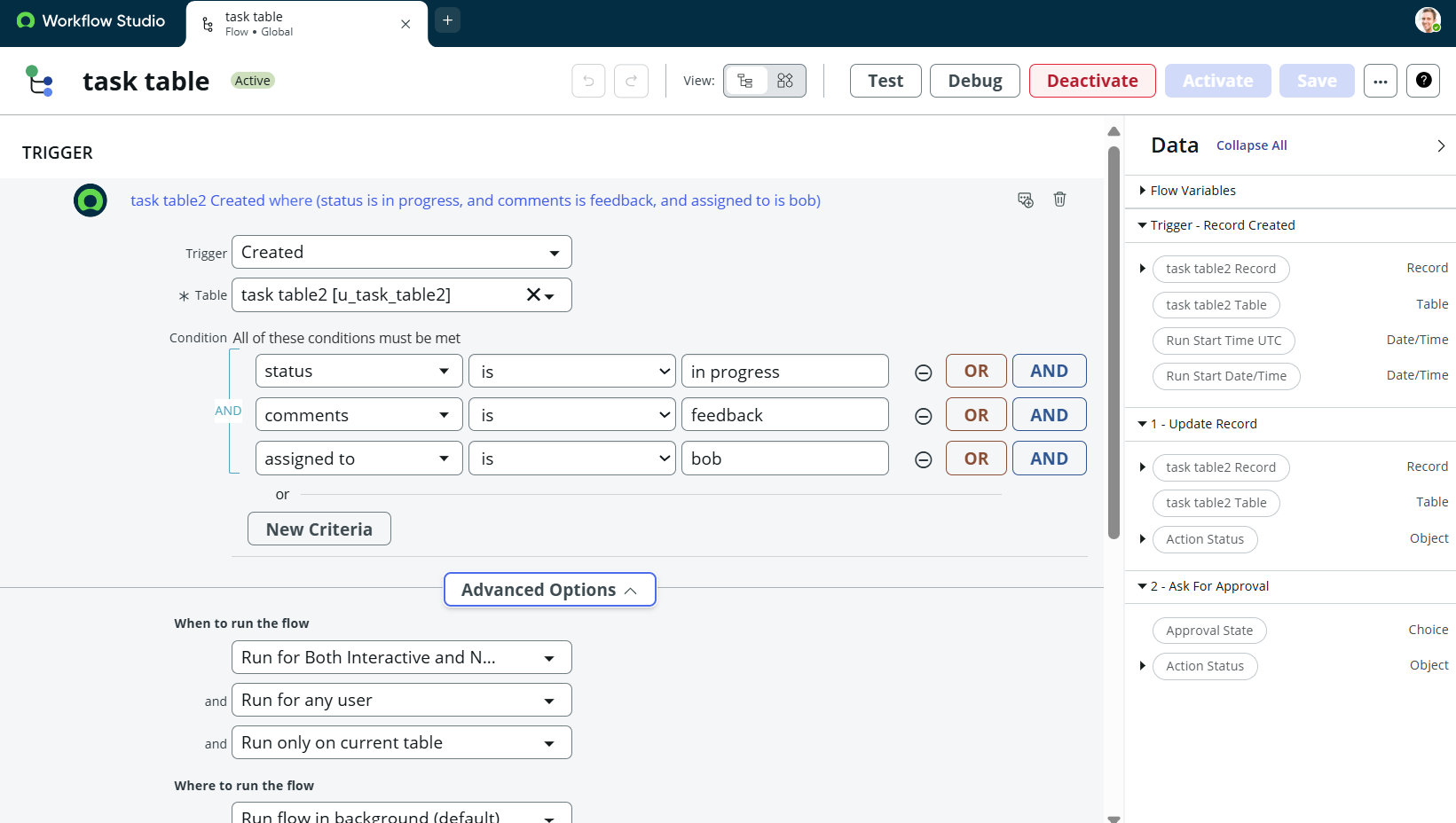
**next step:**

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

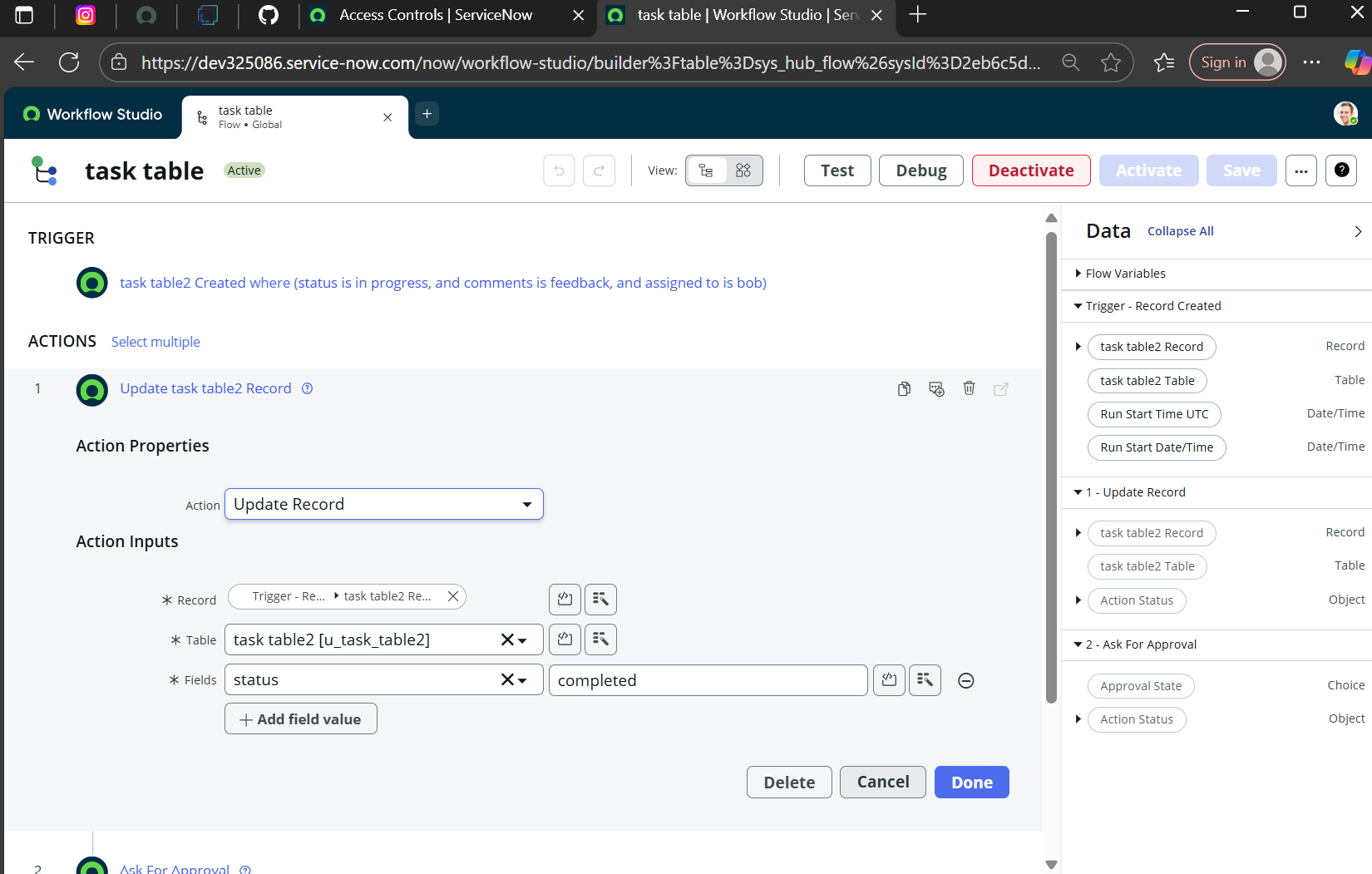
                                   Field : assigned to Operator :is Value : bob

1. After that click on Done.



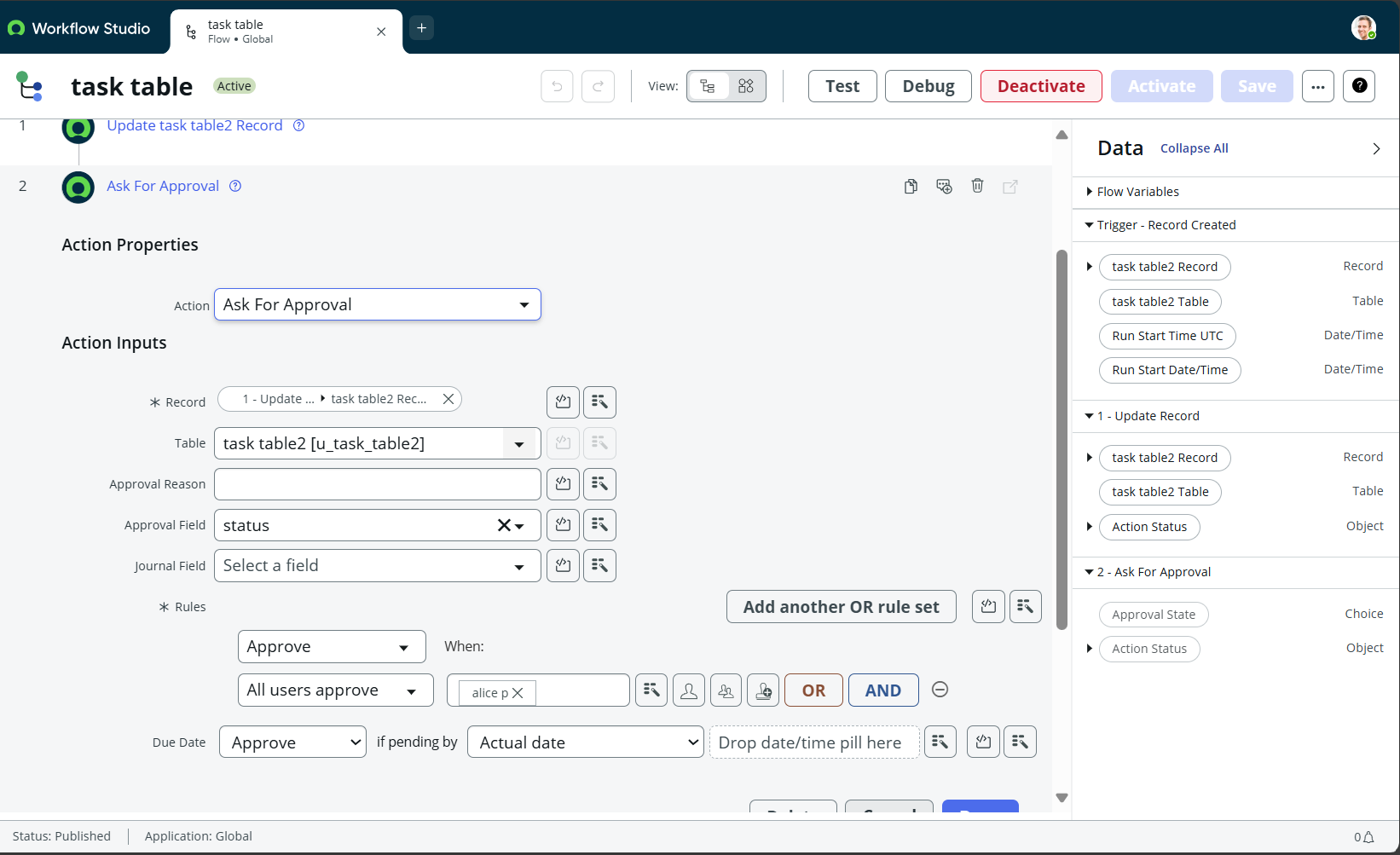
**Next step:**

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.



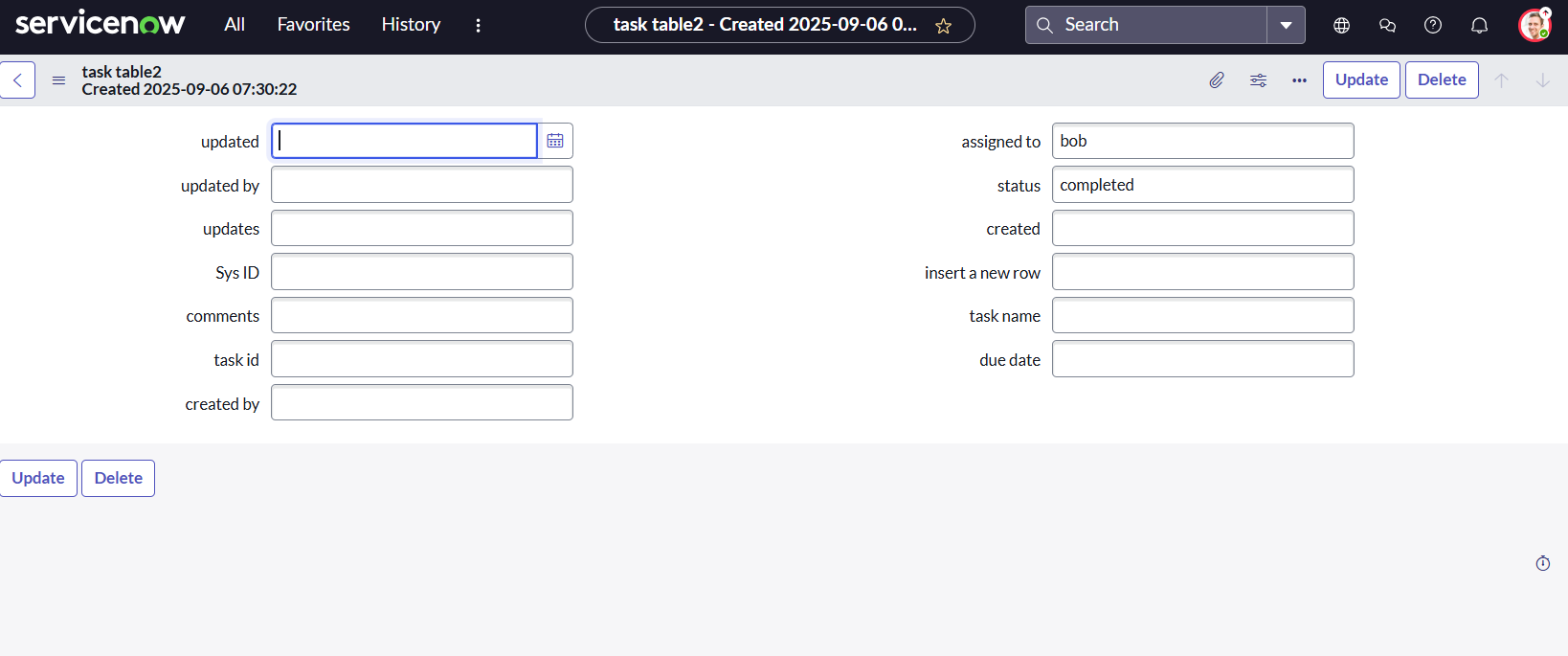
**Next step:**

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.

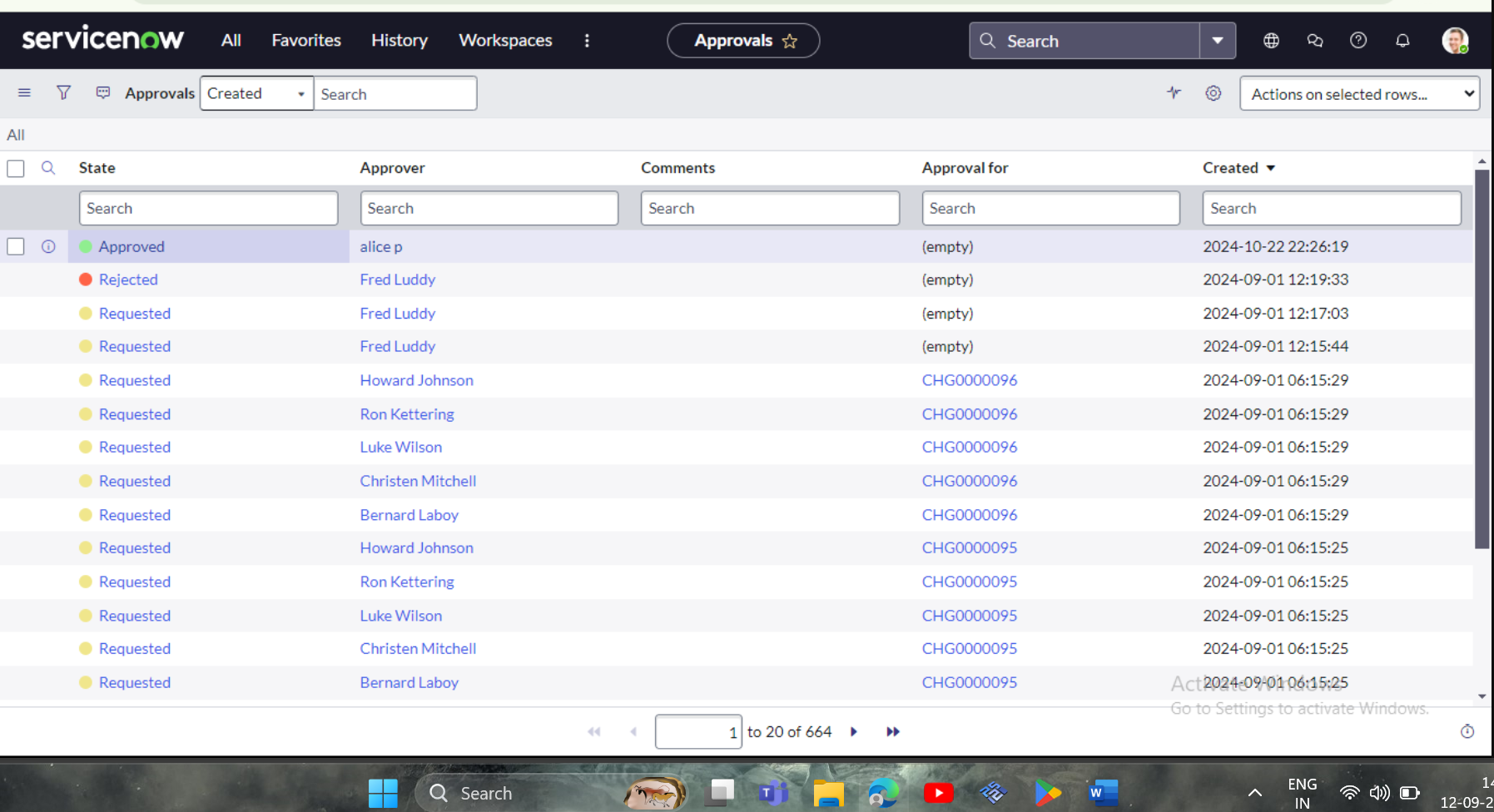
10.It status field is updated to completed



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



**Conclusion**

By implementing structured user, group, and role management along with well-defined access controls and workflows, the project management environment becomes more secure, transparent, and efficient. Clear role assignments ensure that responsibilities are understood, while access restrictions prevent unauthorized actions. The introduction of workflows and approvals streamlines task tracking and enhances accountability.

Together, these improvements not only reduce confusion but also establish a scalable framework that supports collaboration, safeguards project data, and enables the team to focus on delivering results effectively.