OPTIMIZING USER GROUP AND ROLE MANAGEMENT WITH ACCESS CONTROL AND WORKFLOWS

Team ID : NM2025TMID14626

Team Size : 4

Team Leader : Deivanai**.D**

Team member 1: Kalaivani**.M**

Team member 2: Gracy**.R**

Team member 3 : Priyadharshini**.D**

TEAM INITIALIZATION

Streamlining Ticket Assignment:

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:

To optimize user group and role management with access control and workflows, organizations should pursue four primary objectives: enhance security, increase operational efficiency, ensure compliance, and improve the user experience. Integrating automated workflows with a robust access control model, such as Role-Based Access Control (RBAC), is critical to achieving these goals.

Milestone 1: Users

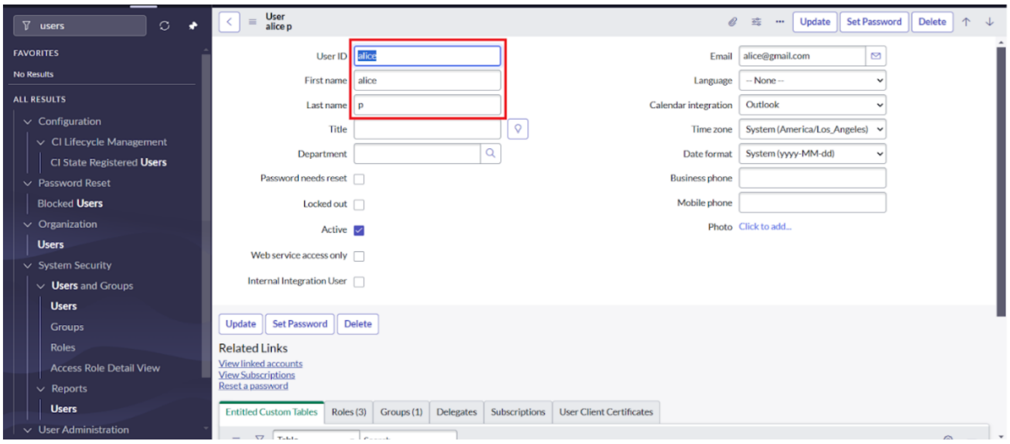
Activity 1: Create Users

1. The first thing we need to do to create user is to Open service now.
2. After opening Servicenow we need to Open the instance.
3. Then Click on All present in the menu bar then search for users.
4. Select Users which is present under system security.

5. After selecting Users under system security, Click on new present in the right side top of the screen.

6. The page will appear as shown below with blank spaces

7. Fill the following details given in the figure shown below to create a user.

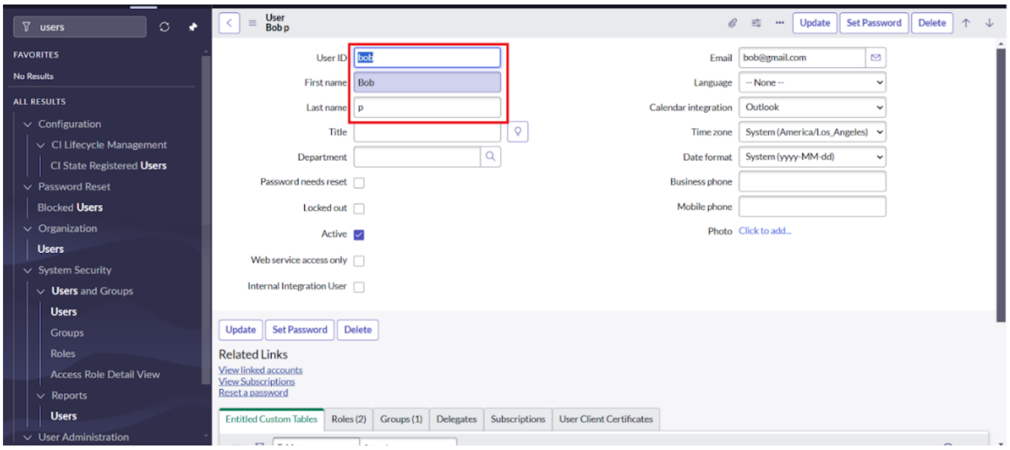


8. Then Click on submit to create the user.

Activity 2: Create one more user

1. The instructions given above are the same for creating another user.

2. Fill the following details given in the figure shown below to create another user.



3. Then Click on submit to complete the creation.

Milestone 2: Groups

Activity 1: Create Groups

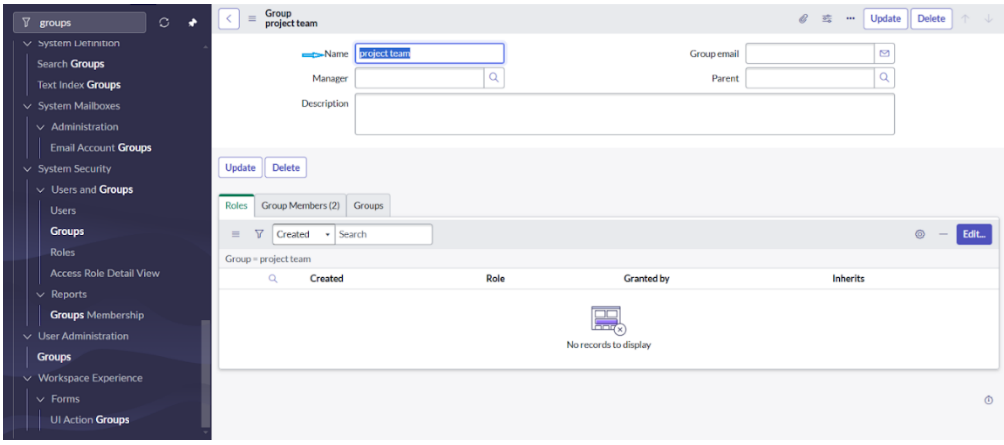
1. The first step is to Open service now.

2. Then Click on All menu option and search for groups in it.

3. Select groups which is present under system security.

4. Then Click on new option present in right top corner of the screen.

5. Fill the following details given in the figure to create a new group.

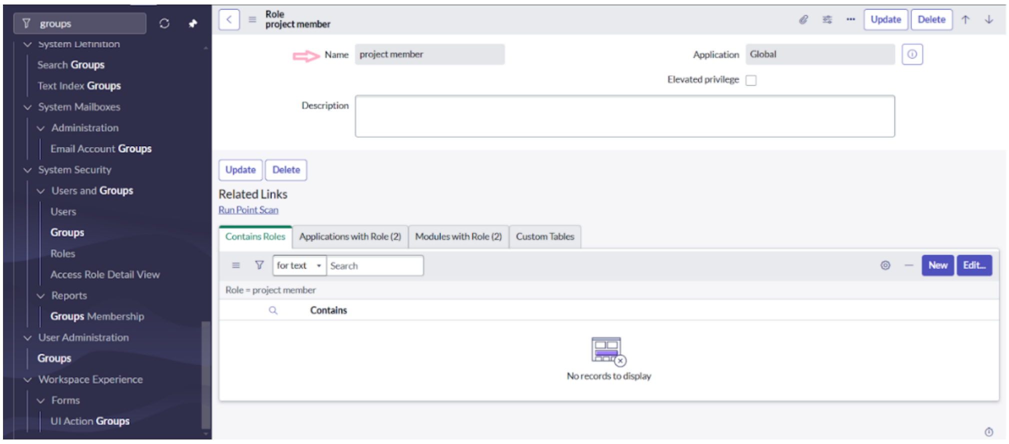


6. Finally Click on submit present in the top right cover of the screen.

Milestone 3: Roles

Activity 1: Create Roles

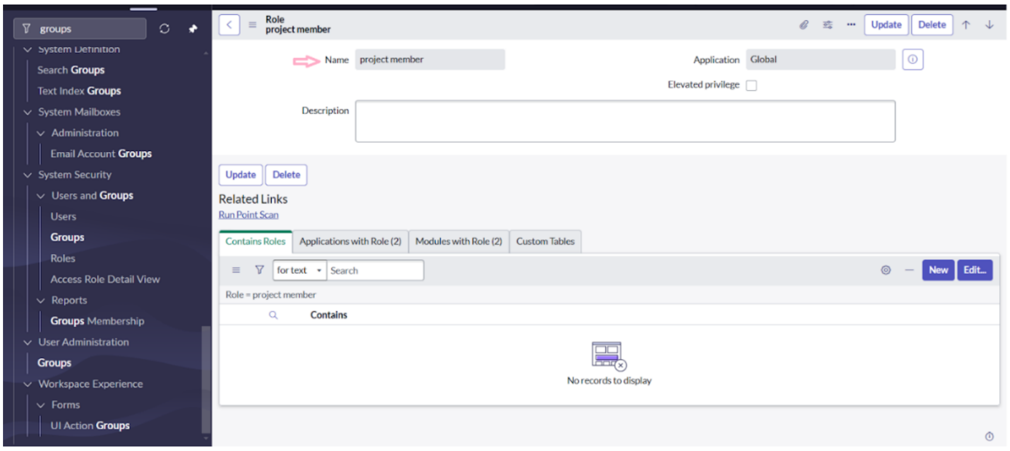
1. The first step is to Open service now.
2. Then Click on All menu and search for roles in it.
3. Select roles which is present under system security.
4. In that page Click on new to open a new page to create role.
5. The using the figure given Fill the following details to create a new role



6. Then finally Click on submit to complete the process.

Activity 2: Create another Roles

1. To Create another role follow the same instruction to open new page.
2. The with the help of the figure, fill the details of the role to be created.



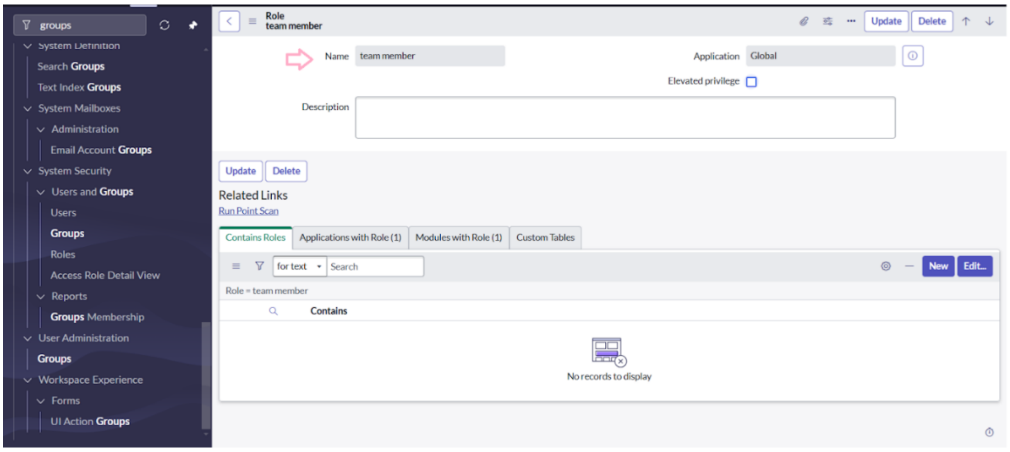
3. Then Click on submit to complete creating the role with name Platform_role

Milestone 4: Table

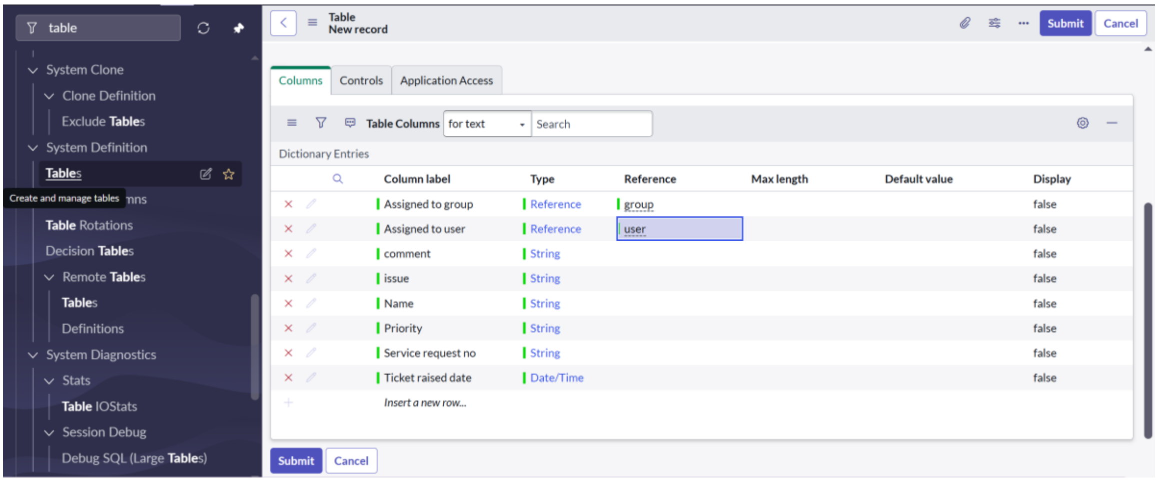
Activity: Create Table

1. First Open service now instances.
2. Then Click on All menu and search for tables in it.
3. In that Select tables which is present under system definition.
4. After opening tables, Click on new to create new table.
5. Fill the following details to create a new table.

- Label : project table
- Check the boxes Create module & Create mobile module
- Under new menu name : project table



6. In the below we can see column option for the created table. Give columns as shown in the figure below



7. Click on submit to complete creating the table.

8. Create choices for the issue filed by using form design

Choices are:

- Unable to login to platform
- 404 error
- Regarding certificates
- Regarding user expired

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

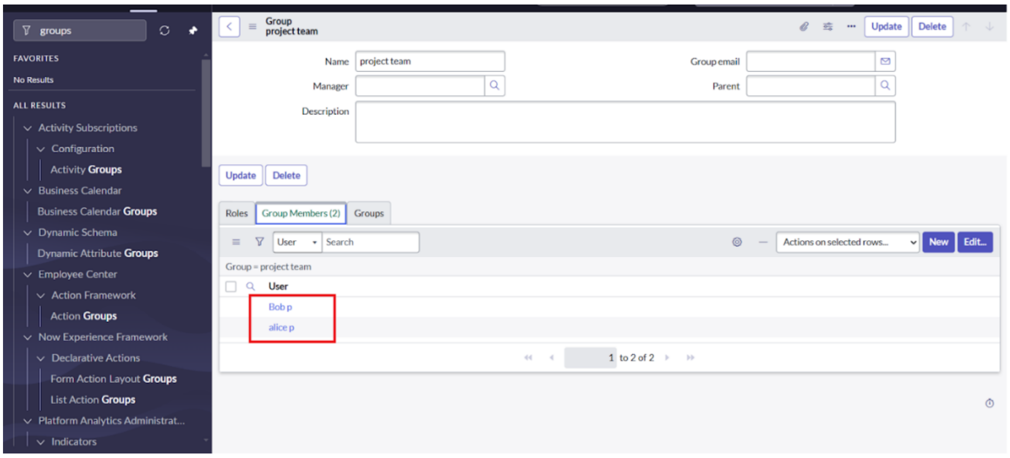
3.Select tables under system definition

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 role to user

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

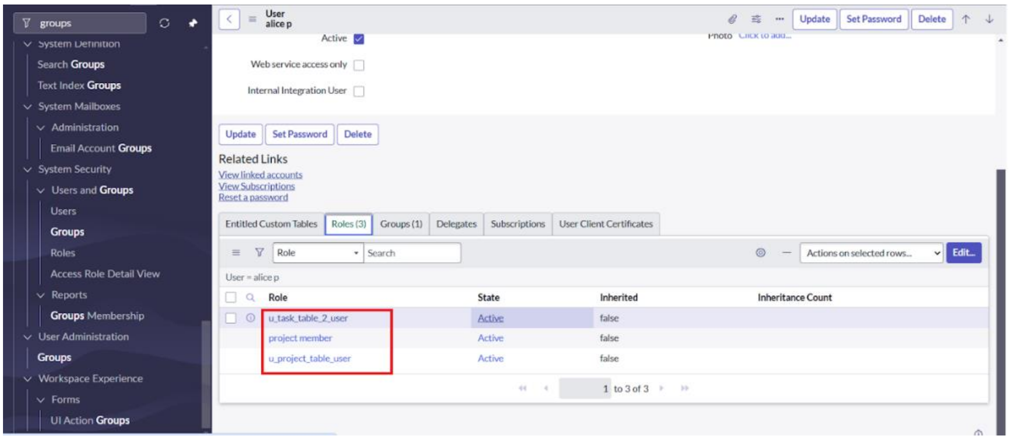
4.Under project manager

5.Click on edit

6.Select project member and save

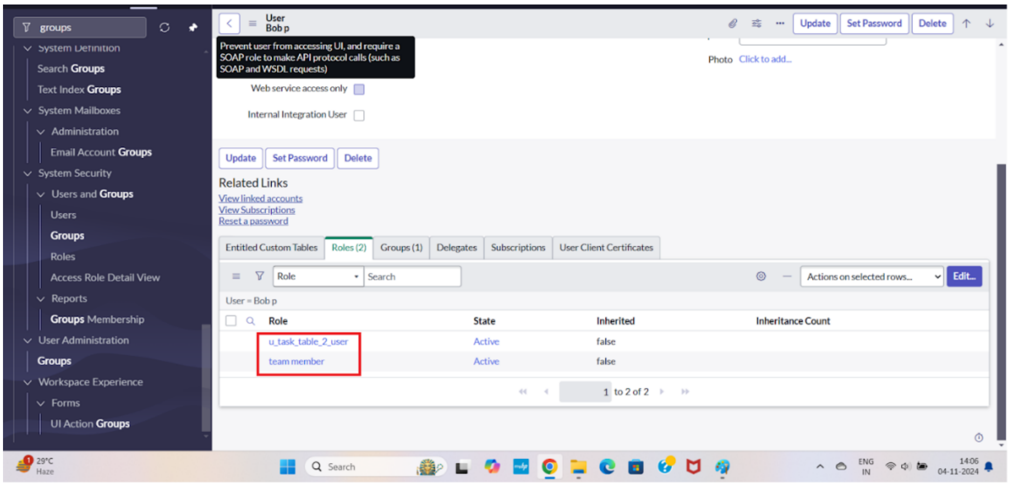
7.click on edit add u_project_table role and u_task_table role

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

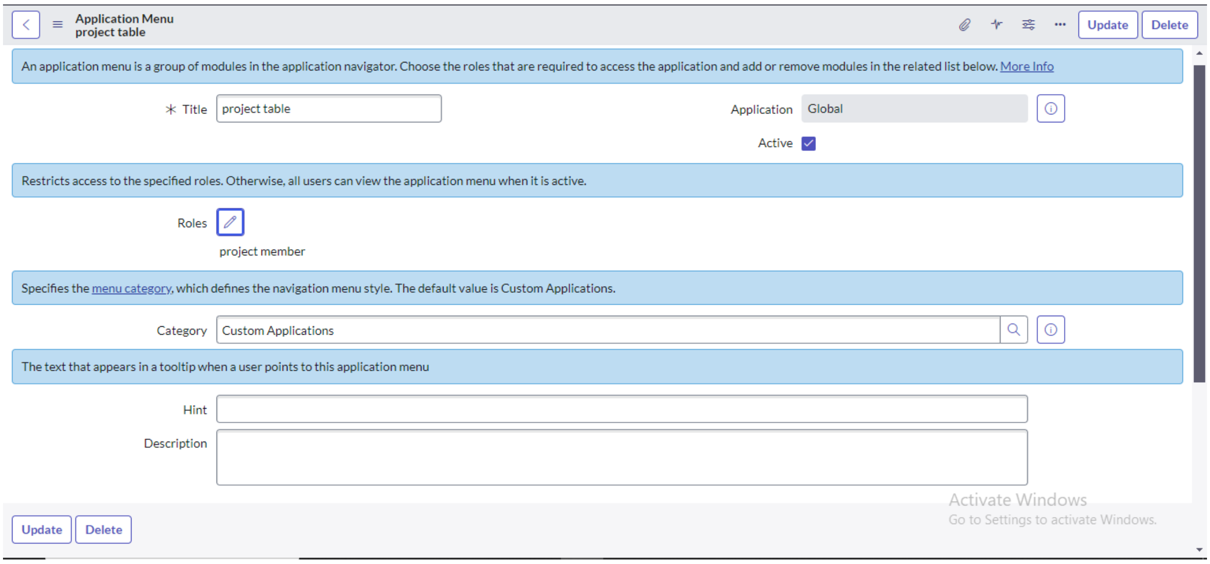
2.Go to application navigator search for search project table application

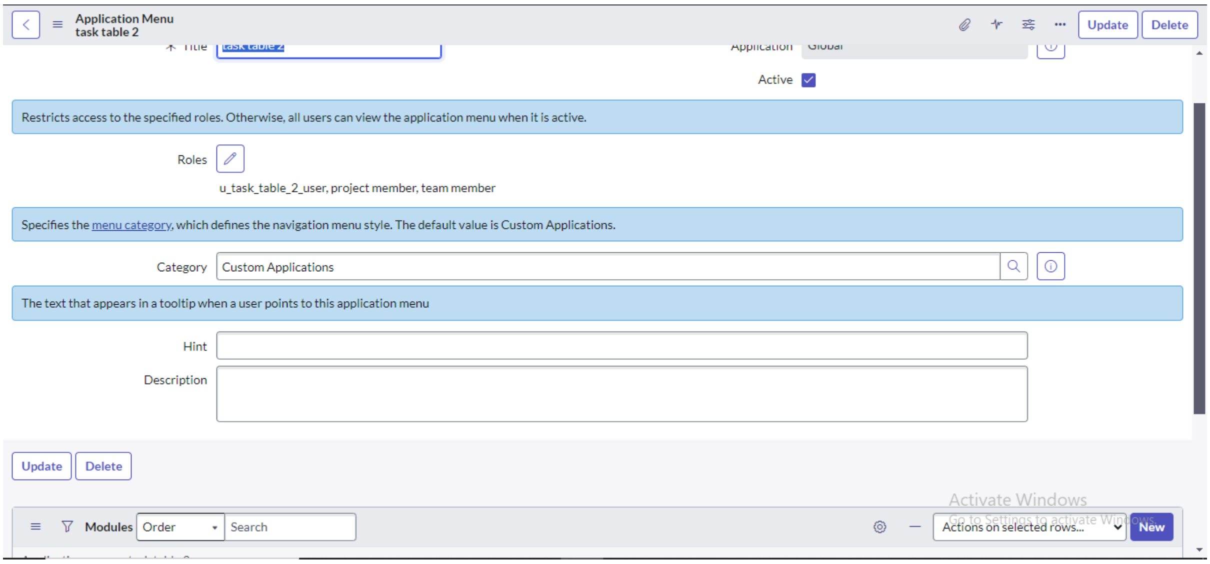
3.Click on edit module

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: Create ACL

Activity 1: Create ACL

1.Open service now.

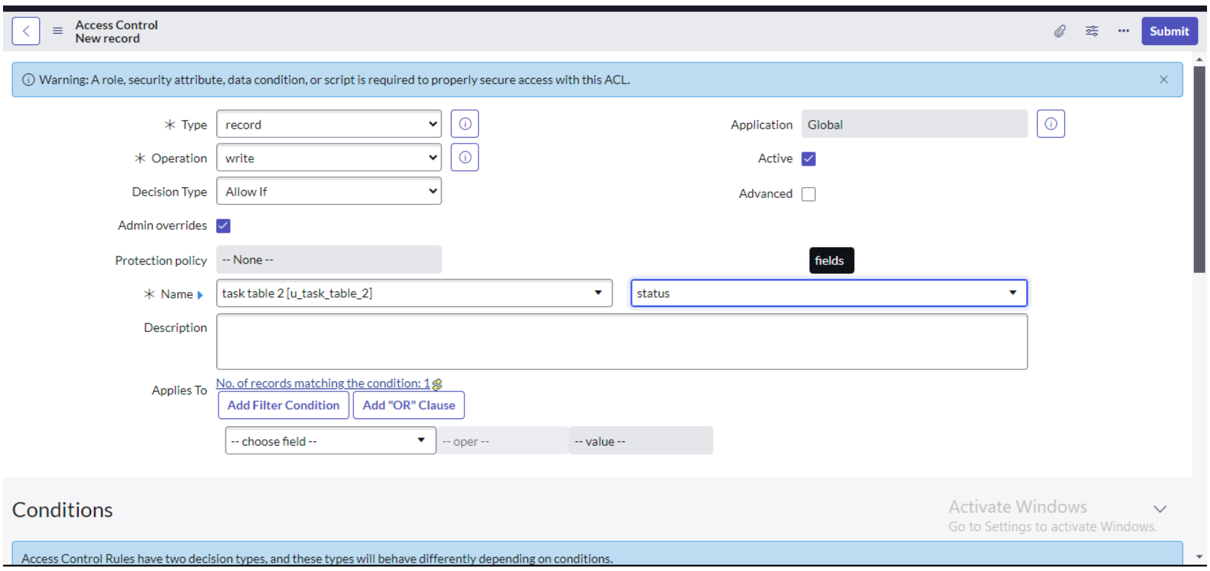
2.Click on All >> search for ACL

3.Select Access Control(ACL) under system security

4.Click on elevate role

5.Click on new

6.Fill the following details to create a new ACL



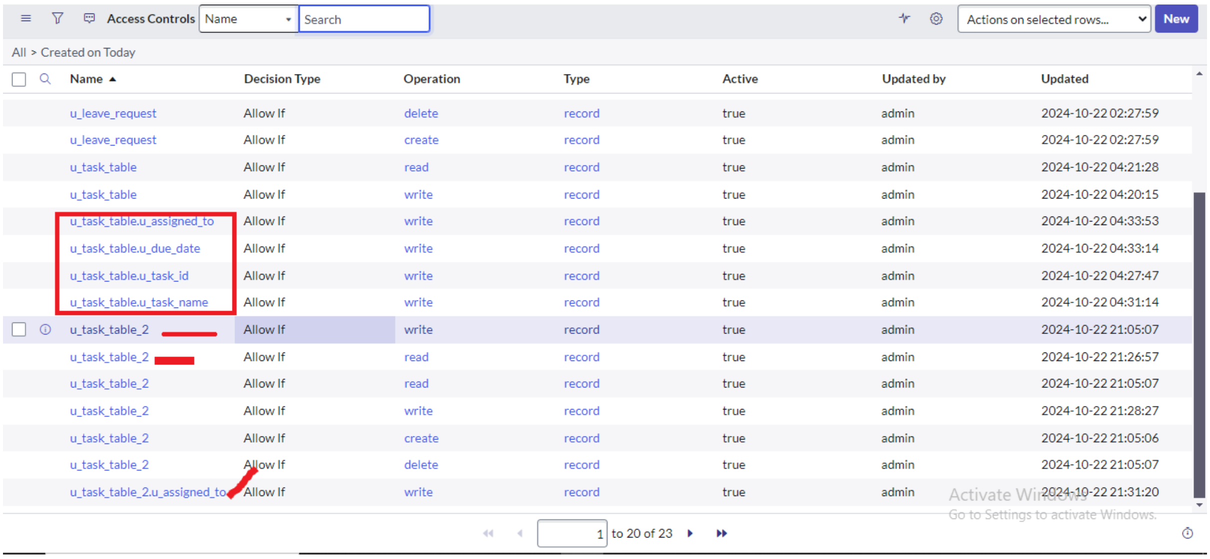
1.Scroll down under requires role

2.Double click on insert a new row

3.Give task table and team member role

4.Click on submit

5.Similarly create 4 acl for the following fields



Access Controls | Name | Search | Actions on selected rows... | New

All > Created on Today

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_leave_request	Allow If	delete	record	true	admin	2024-10-22 02:27:59
u_leave_request	Allow If	create	record	true	admin	2024-10-22 02:27:59
u_task_table	Allow If	read	record	true	admin	2024-10-22 04:21:28
u_task_table	Allow If	write	record	true	admin	2024-10-22 04:20:15
u_task_table.u_assigned_to	Allow If	write	record	true	admin	2024-10-22 04:33:53
u_task_table.u_due_date	Allow If	write	record	true	admin	2024-10-22 04:33:14
u_task_table.u_task_id	Allow If	write	record	true	admin	2024-10-22 04:27:47
u_task_table.u_task_name	Allow If	write	record	true	admin	2024-10-22 04:31:14
u_task_table_2	Allow If	write	record	true	admin	2024-10-22 21:05:07
u_task_table_2	Allow If	read	record	true	admin	2024-10-22 21:26:57
u_task_table_2	Allow If	read	record	true	admin	2024-10-22 21:05:07
u_task_table_2	Allow If	write	record	true	admin	2024-10-22 21:28:27
u_task_table_2	Allow If	create	record	true	admin	2024-10-22 21:05:06
u_task_table_2	Allow If	delete	record	true	admin	2024-10-22 21:05:07
u_task_table_2.u_assigned_to	Allow If	write	record	true	admin	2024-10-22 21:31:20

1 to 20 of 23

Activate Windows
Go to Settings to activate Windows.

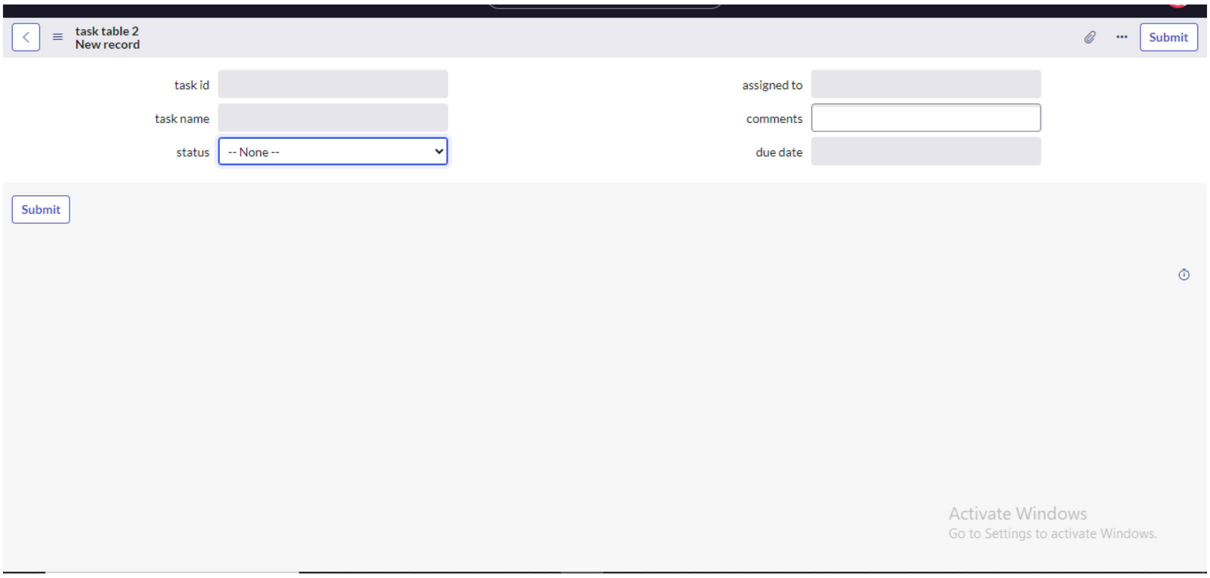
6.Click on profile on top right side

7.Click on impersonate user

8.Select bob user

9.Go to all and select task table2 in the application menu bar

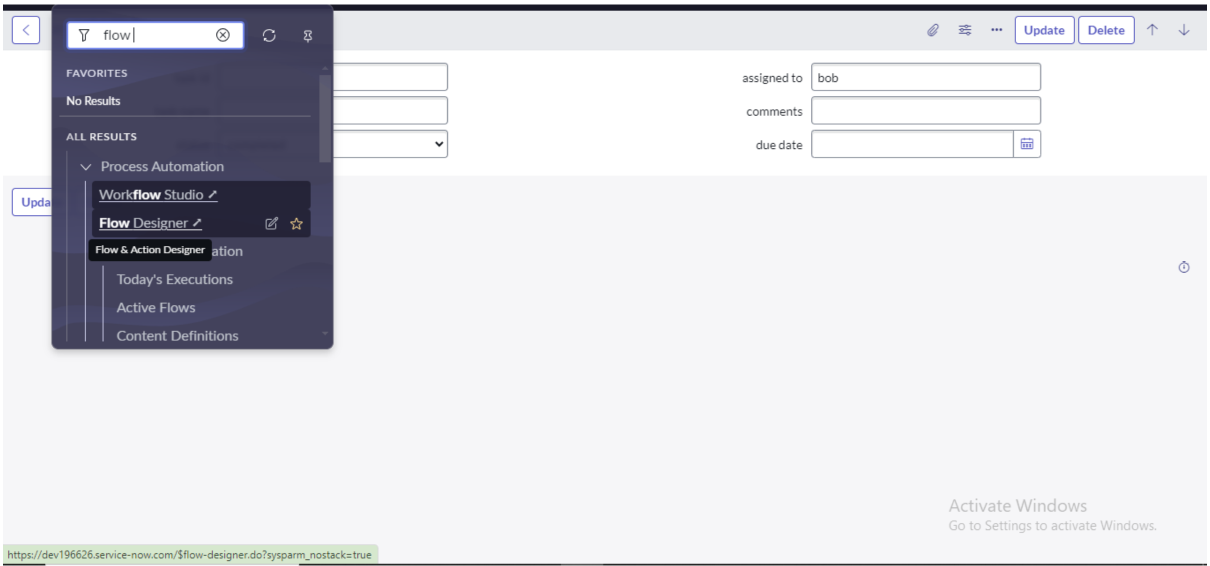
10. Comment and status fields are have the edit access

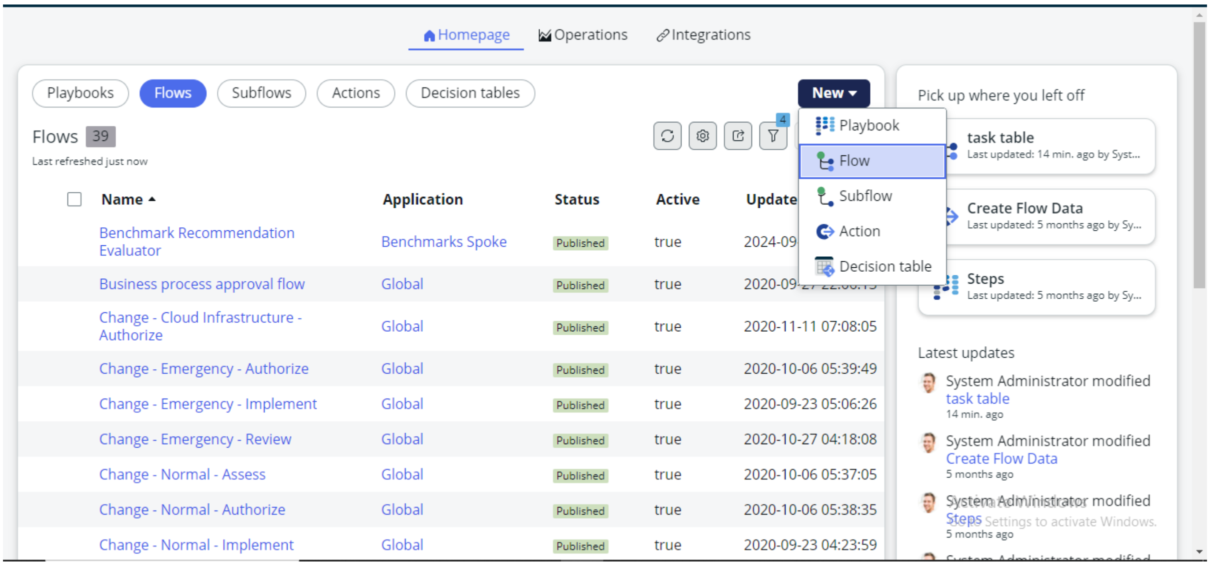


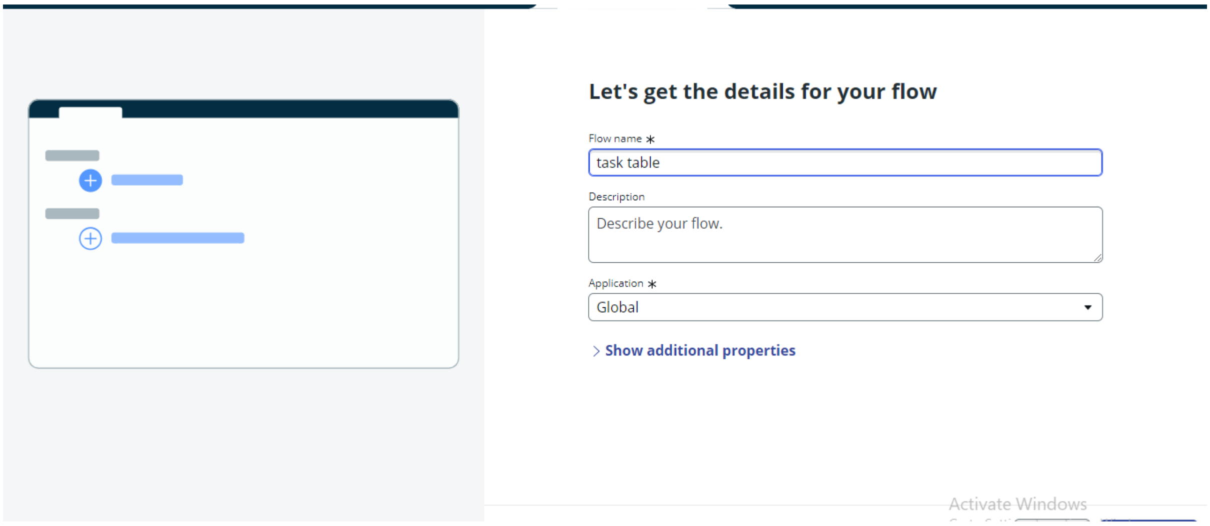
Milestone 9: Flow

Activity: Create a Flow to Assign operations ticket to group

1. He first step is to Open service now.
2. Then Click on All >> search for Flow Designer
3. Next 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. Then Click build flow.


flow
FAVORITES
No Results
ALL RESULTS
Process Automation
Workflow Studio
Flow Designer
Flow & Action Designer
Today's Executions
Active Flows
Content Definitions
Update
Delete
assigned to
bob
comments
due date
Activate Windows
Go to Settings to activate Windows.
https://dev196626.service-now.com/$flow-designer.do?sysparm_nostack=true


Homepage
Operations
Integrations
Playbooks
Flows
Subflows
Actions
Decision tables
New
Flows 39
Last refreshed just now
Playbook
Flow
Subflow
Action
Decision table
Name
Application
Status
Active
Benchmark Recommendation Evaluator
Benchmarks Spoke
Published
true
Business process approval flow
Global
Change - Cloud Infrastructure - Authorize
2020-11-11 07:08:05
Change - Emergency - Authorize
2020-10-06 05:39:49
Change - Emergency - Implement
2020-09-23 05:06:26
Change - Emergency - Review
2020-10-27 04:18:08
Change - Normal - Assess
2020-10-06 05:37:05
Change - Normal - Authorize
2020-10-06 05:38:35
Change - Normal - Implement
2020-09-23 04:23:59
Pick up where you left off
task table
Last updated: 14 min. ago by Syst...
Create Flow Data
Last updated: 5 months ago by Sy...
Steps
Last updated: 5 months ago by Sy...
Latest updates
System Administrator modified
task table
14 min. ago
System Administrator modified
Create Flow Data
5 months ago
System Administrator modified
Steps
5 months ago



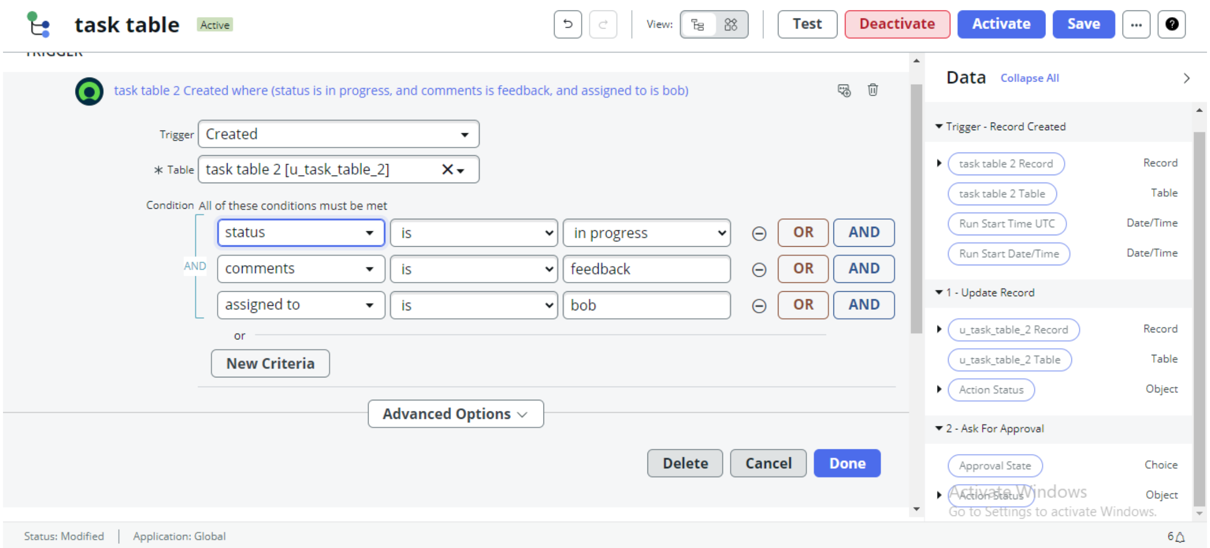
next step:

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

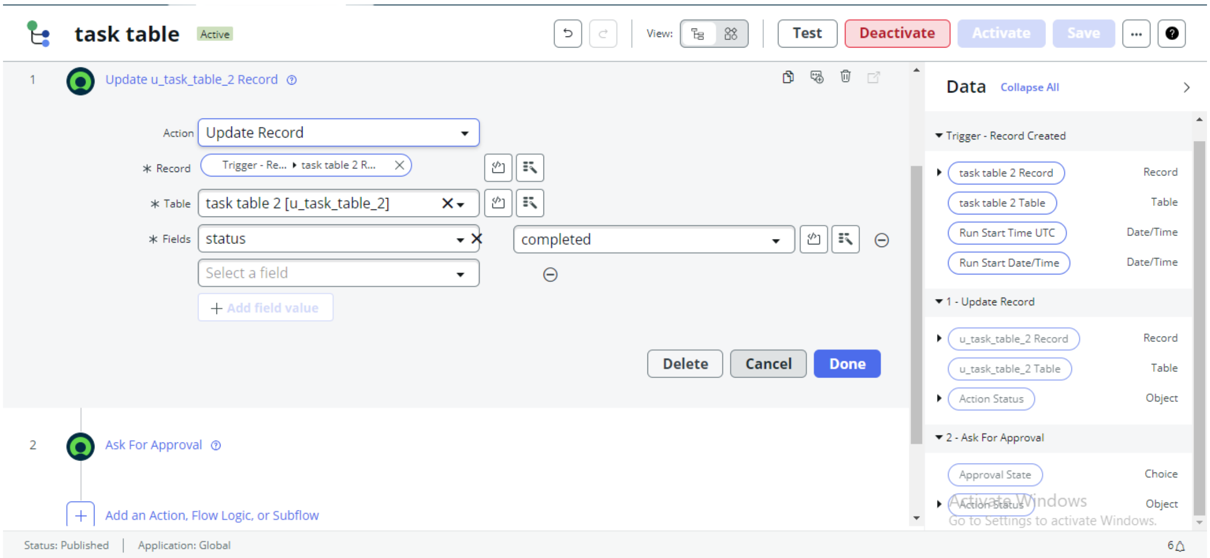
   Field : assigned to Operator :is Value : bob

5.After that click on Done**.**



Next step:

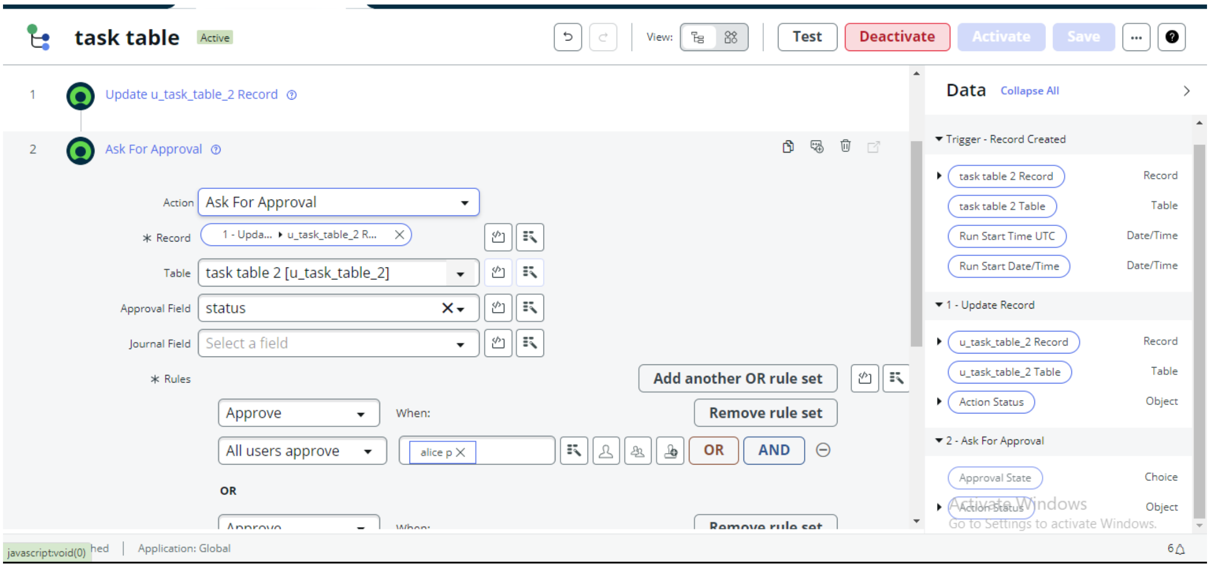
1. Click on Add an action.
2. Select action in that ,search for “ update records”.
3. In Record field drag the fields from the data navigation from Right Side(Data pill)
4. Table will be auto assigned after that
5. Add fields as “status” and value as “completed”
6. Click on Done.



Next step:

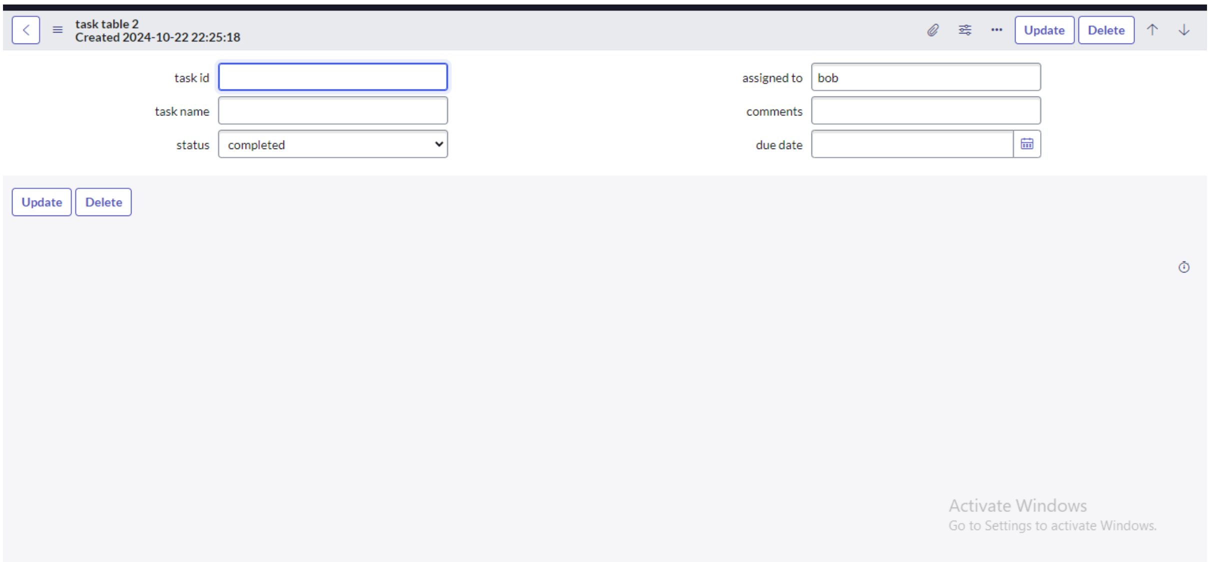
1. Now under Actions.
2. Click on Add an action.
3. Select action in that ,search for “ ask for approval ”.
4. In Record field drag the fields from the data navigation from Right side
5. Table will be auto assigned after that
6. Give the approve field as “ status”
7. Give approver as alice p

8. Click on Done.



9.Go to application navigator search for task table.

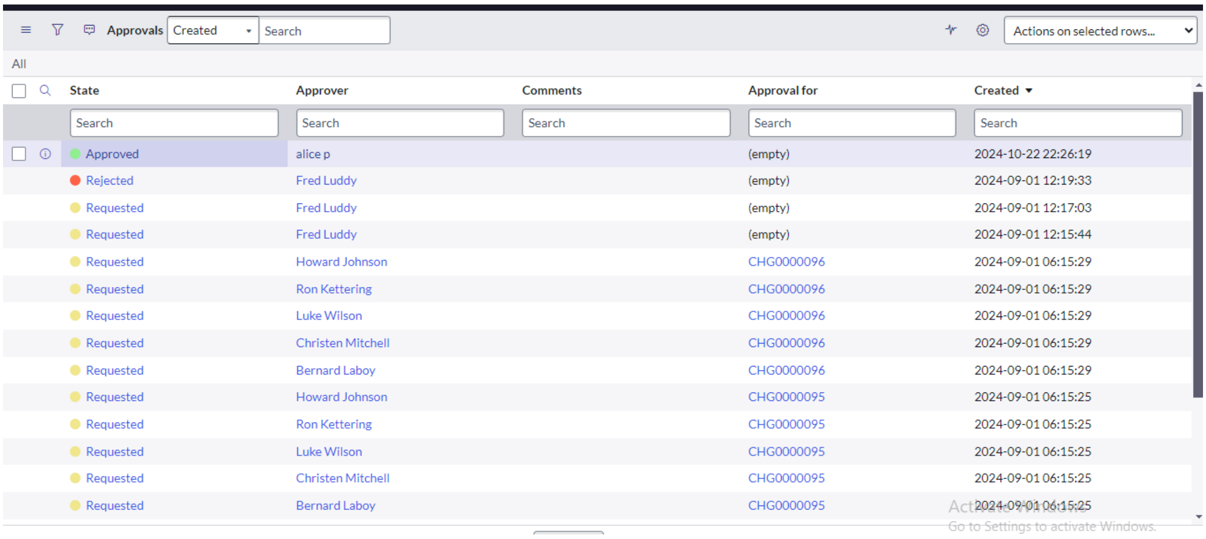
10.It status field is updated to completed



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



Approvals | Created | Search | Actions on selected rows...

All

State	Approver	Comments	Approval for	Created
Approved	alice p		(empty)	2024-10-22 22:26:19
Rejected	Fred Luddy		(empty)	2024-09-01 12:19:33
Requested	Fred Luddy		(empty)	2024-09-01 12:17:03
Requested	Fred Luddy		(empty)	2024-09-01 12:15:44
Requested	Howard Johnson		CHG0000096	2024-09-01 06:15:29
Requested	Ron Kettering		CHG0000096	2024-09-01 06:15:29
Requested	Luke Wilson		CHG0000096	2024-09-01 06:15:29
Requested	Christen Mitchell		CHG0000096	2024-09-01 06:15:29
Requested	Bernard Laboy		CHG0000096	2024-09-01 06:15:29
Requested	Howard Johnson		CHG0000095	2024-09-01 06:15:25
Requested	Ron Kettering		CHG0000095	2024-09-01 06:15:25
Requested	Luke Wilson		CHG0000095	2024-09-01 06:15:25
Requested	Christen Mitchell		CHG0000095	2024-09-01 06:15:25
Requested	Bernard Laboy		CHG0000095	2024-09-01 06:15:25

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.