TITLE

Streamlining Ticket Assignment for Efficient Support Operations

Team Id: NM2025TMID14558

Team Leader: Deva S

Team Members

Team Member 1: Arul Murugan A

Team Member 2: Rohith J

Team Member 3: Sree Rakesh M

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

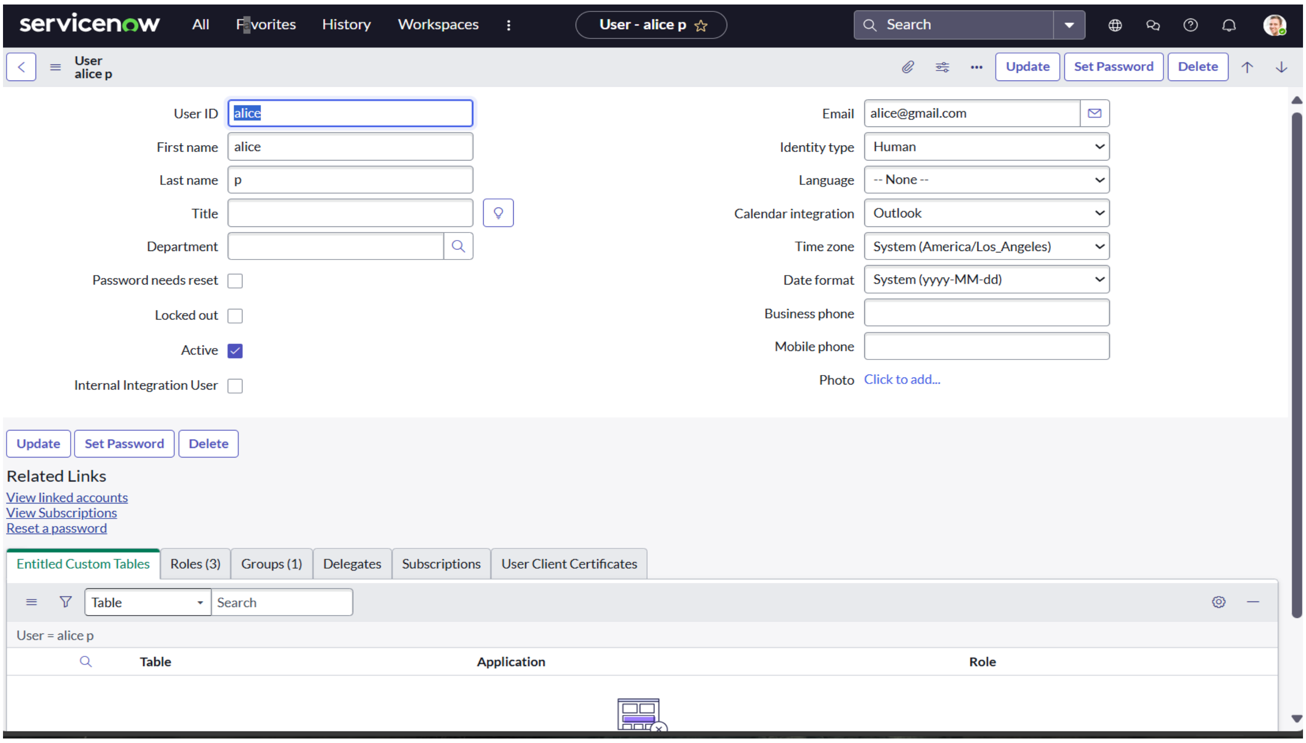
TASK INITIATION

Milestone 1 : Users

Activity 1: Create Users

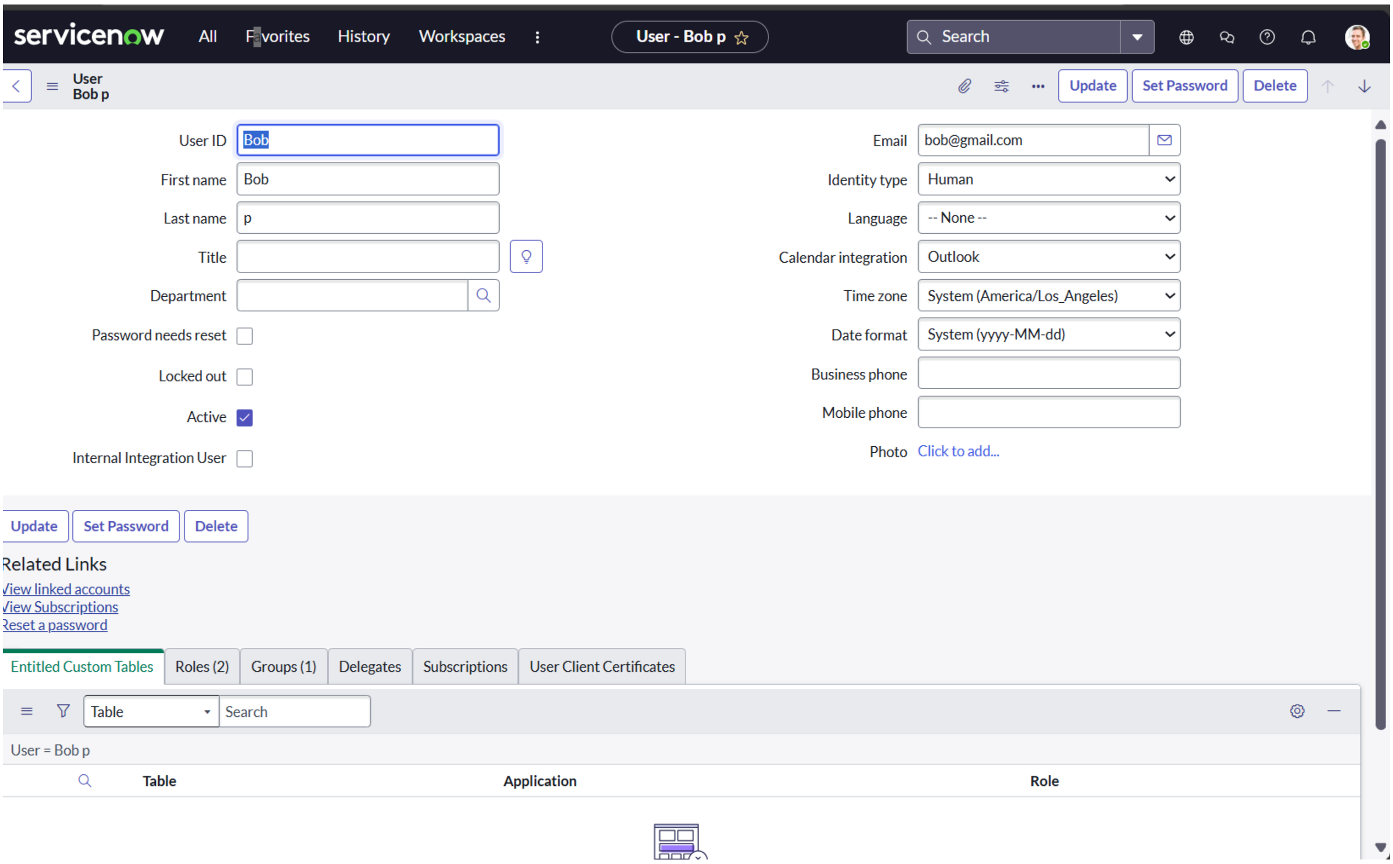
1. Open service now
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user

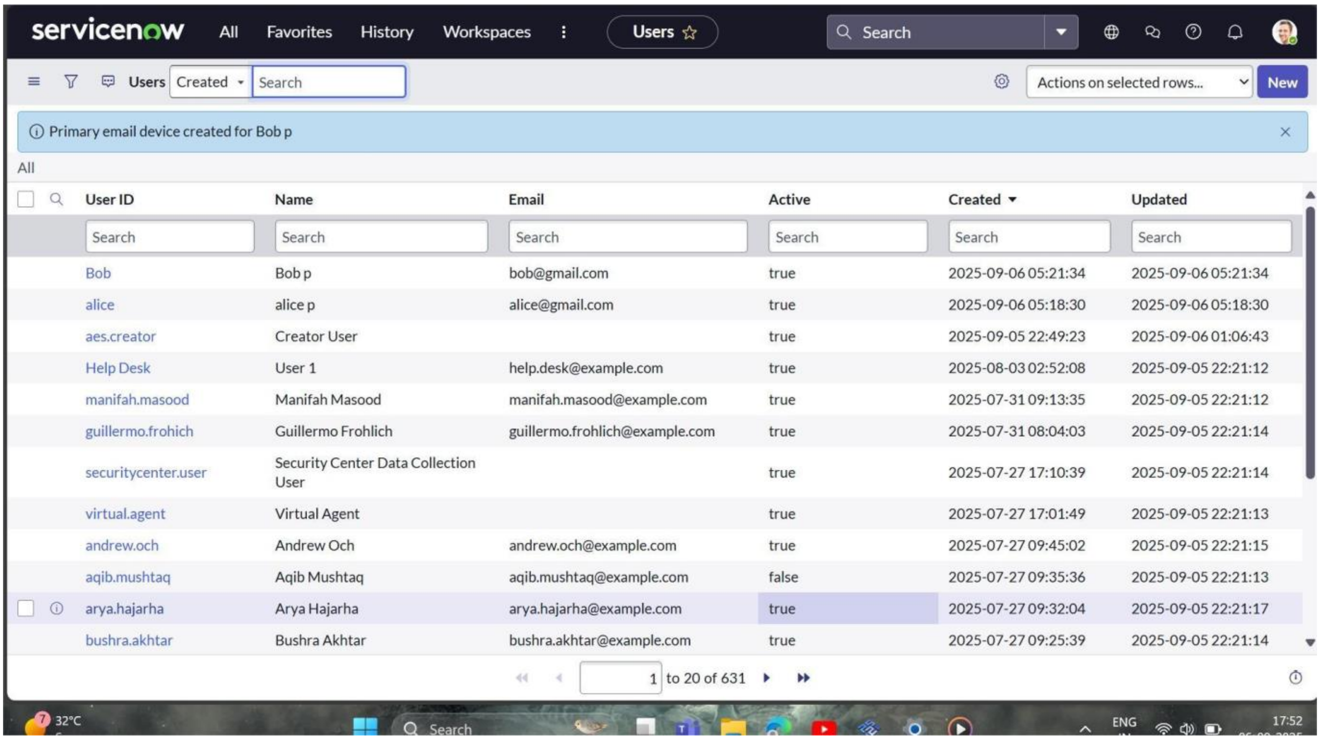
6. Click on submit.



Create one more user:

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

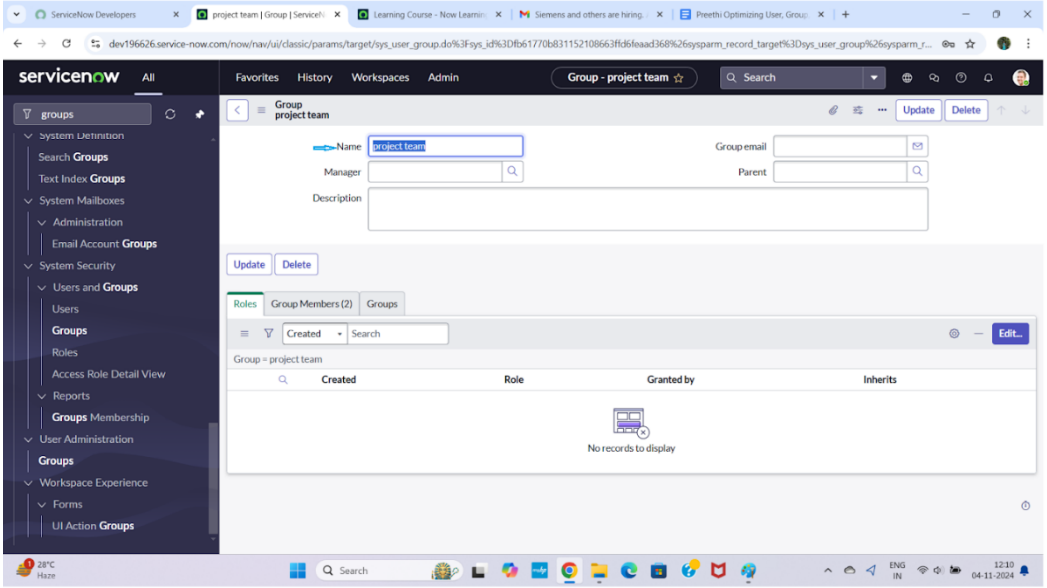




Milestone 2 : Groups

Activity 1: Create Groups

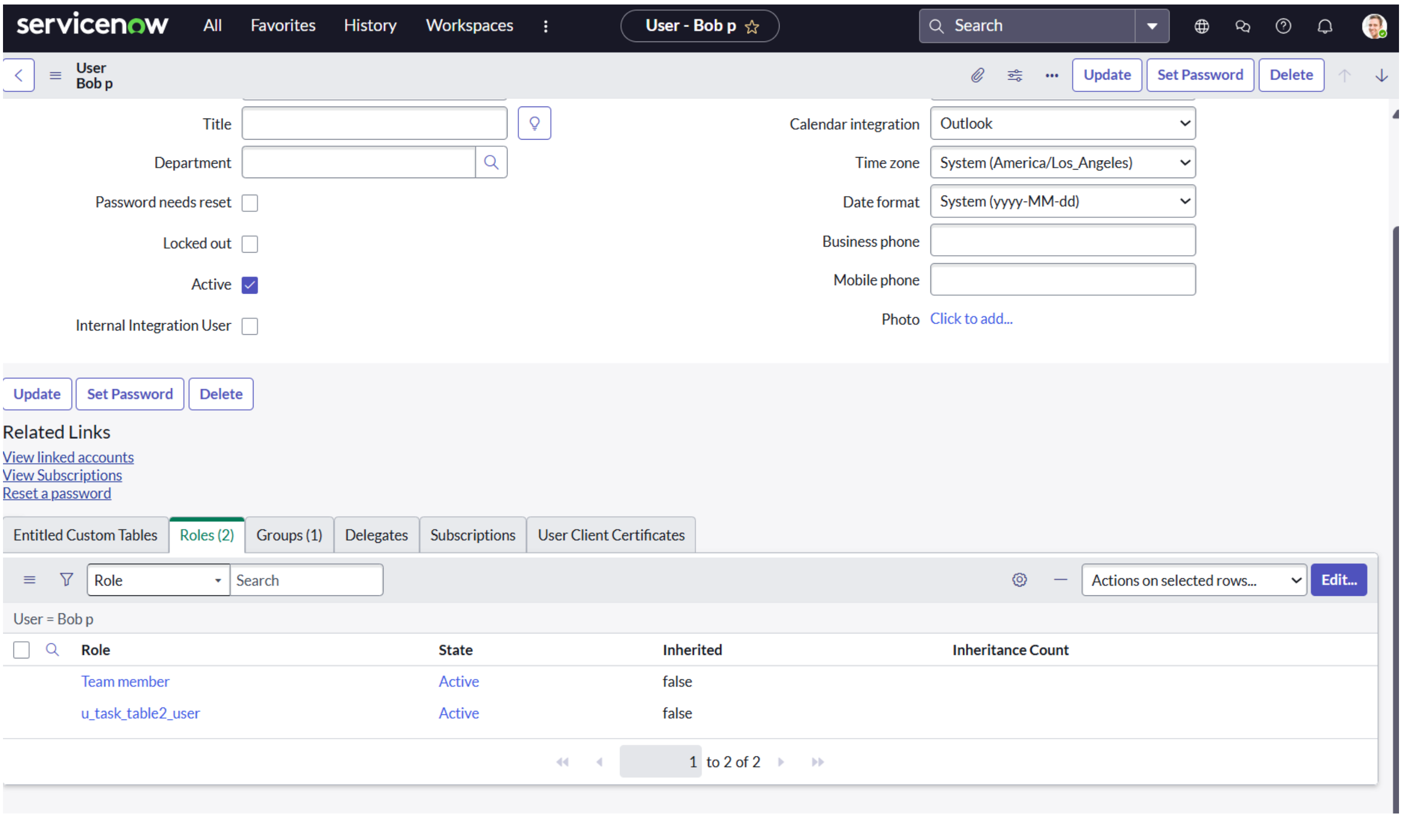
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group
6. Click on submit



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

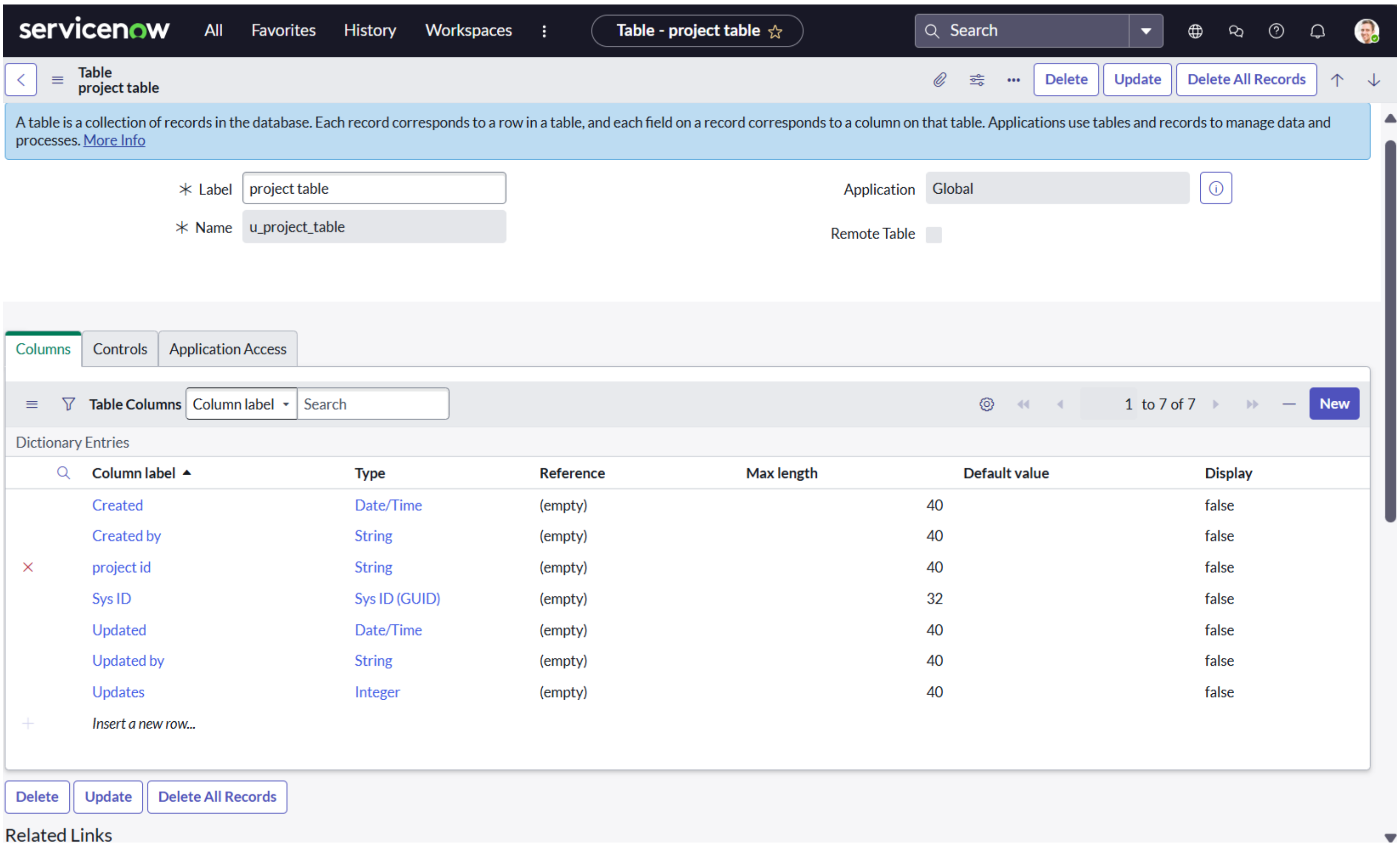
Activity 1: Create Table

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

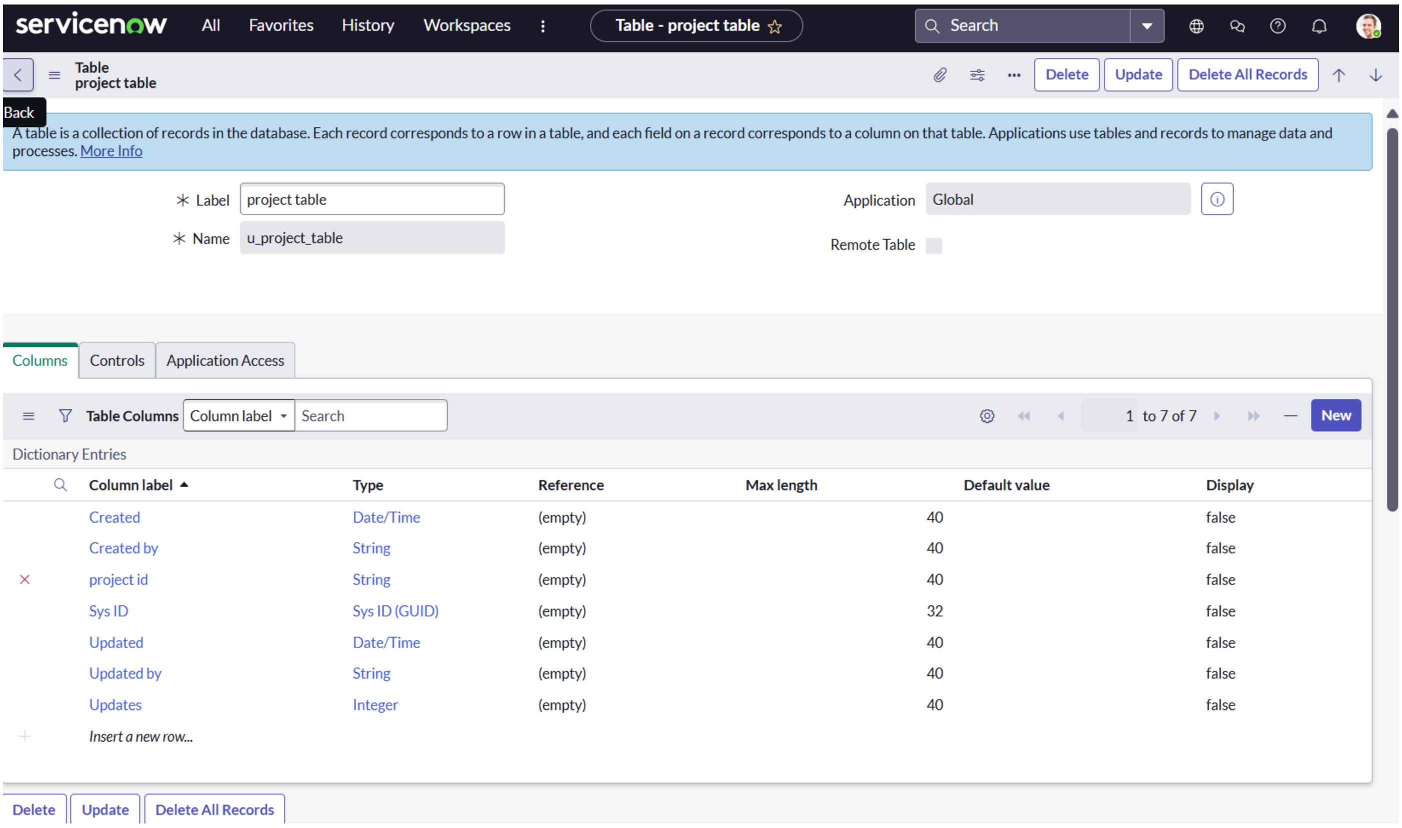
8. Click on submit



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

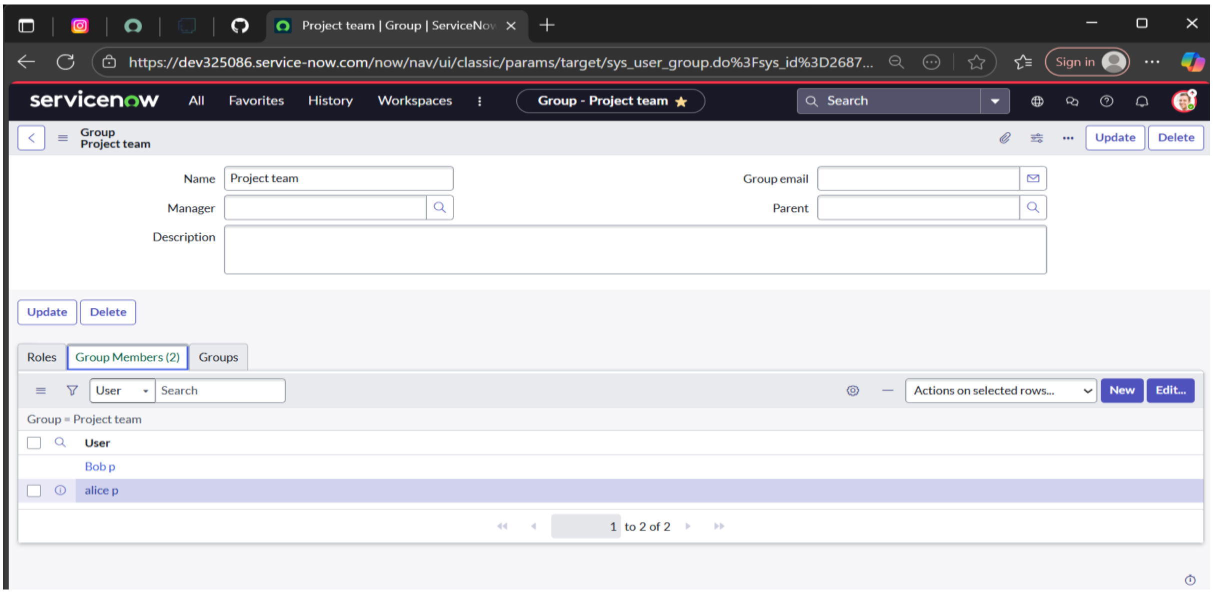
3.Select tables under system definition

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

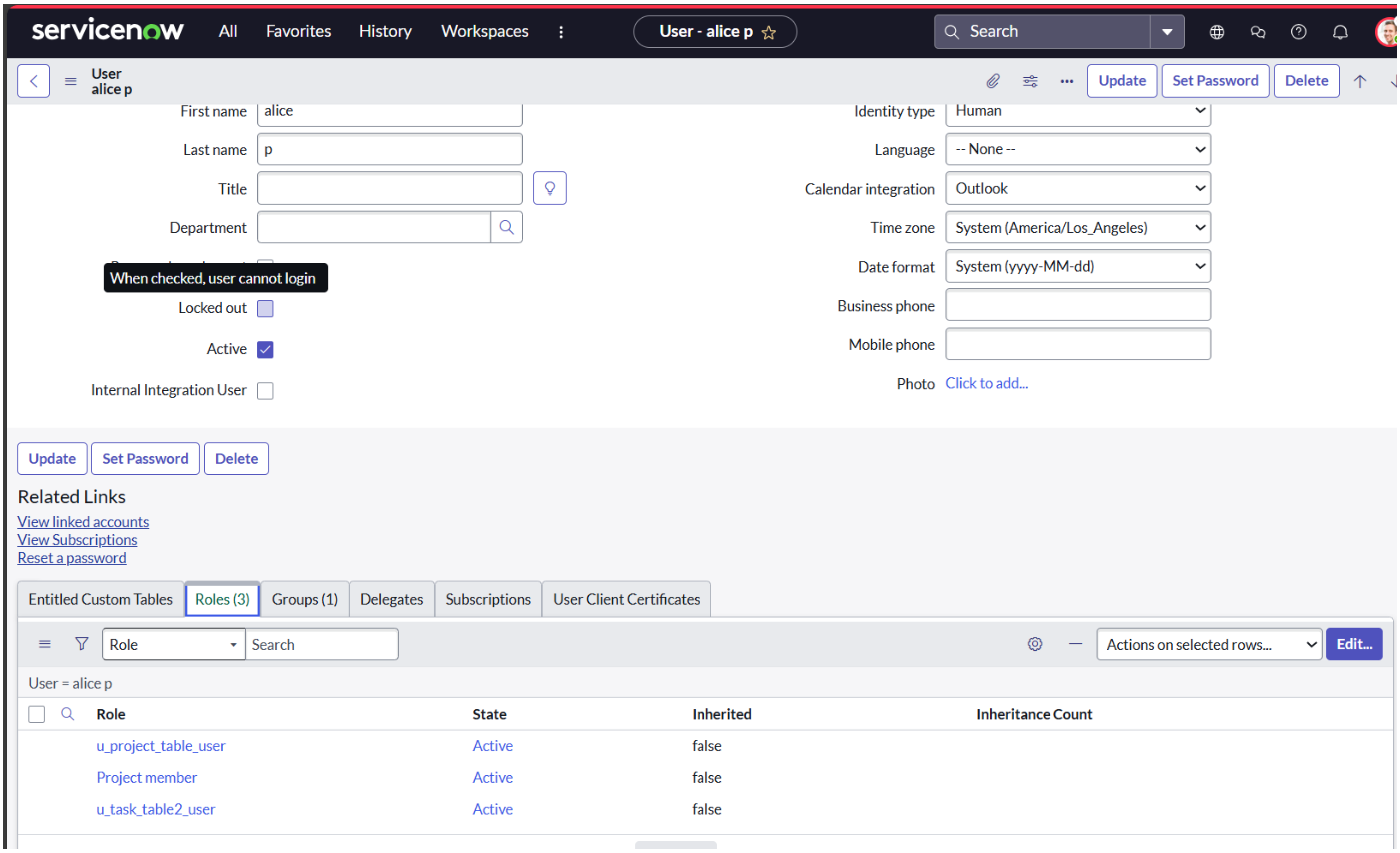
4.Under project manager

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

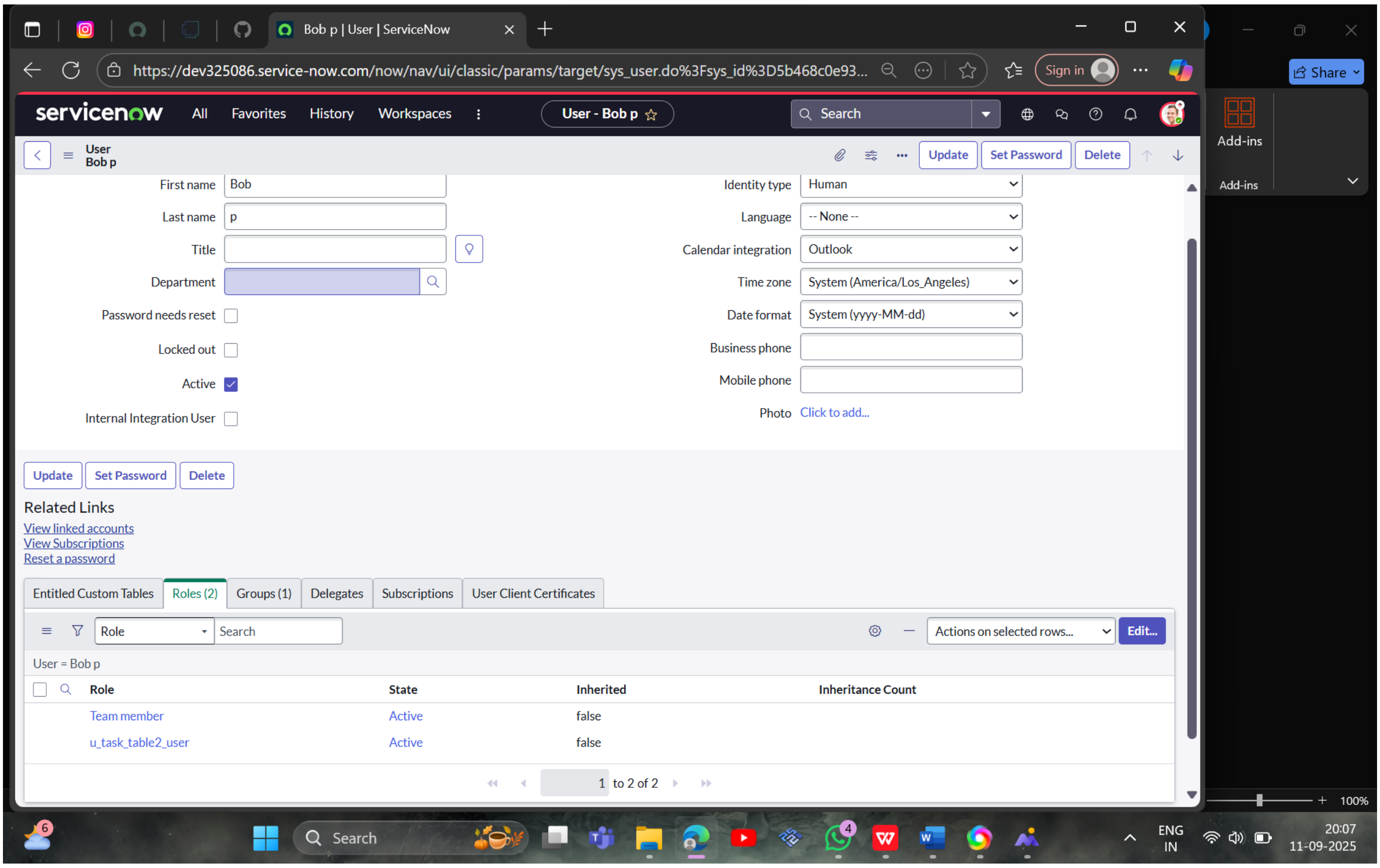
4.Under team member

5.Click on edit

6.Select team member and give table role and save

7. Click on profile icon Impersonate user to bob

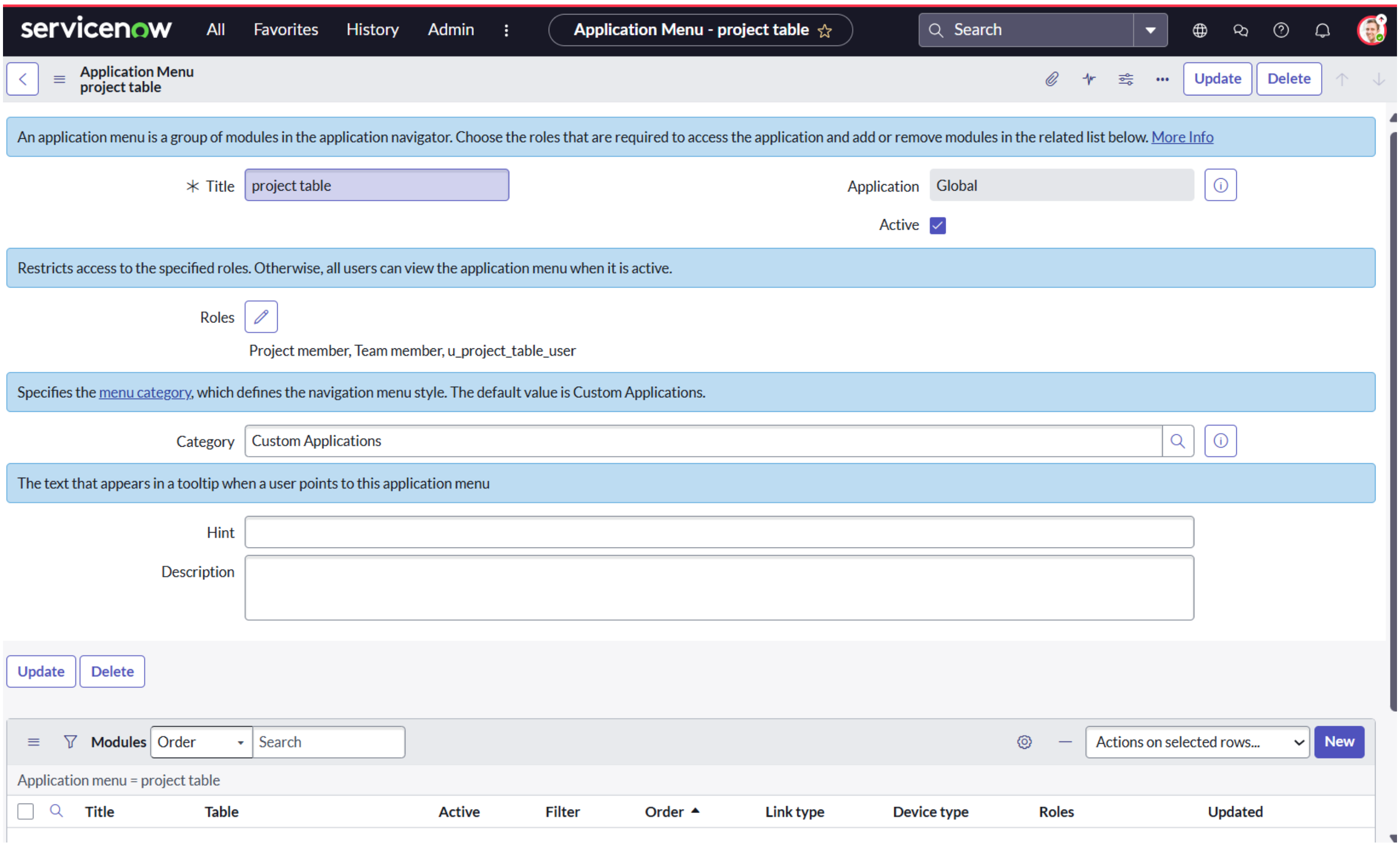
8. We can see the task table2.

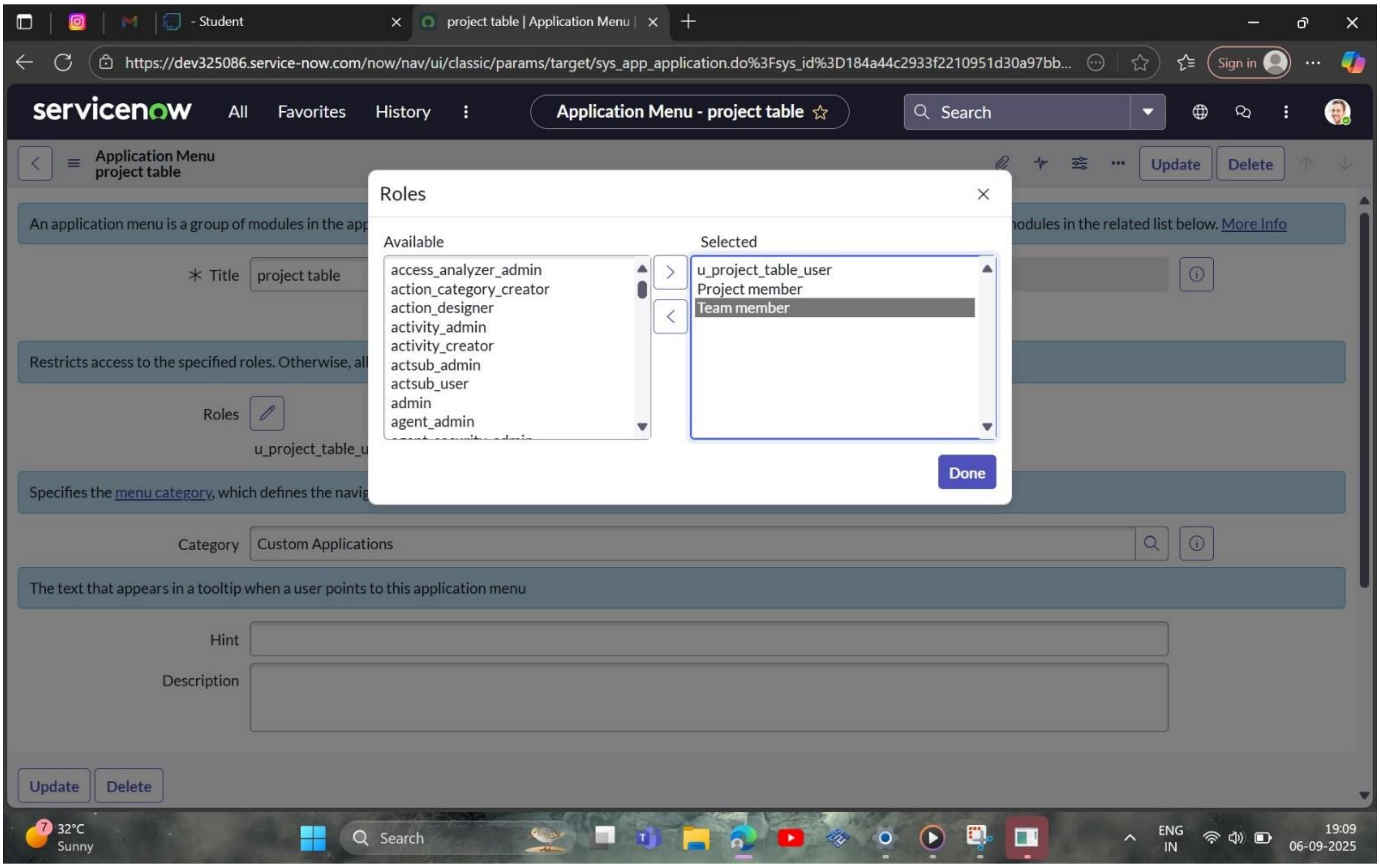


Milestone 7 : Application access

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

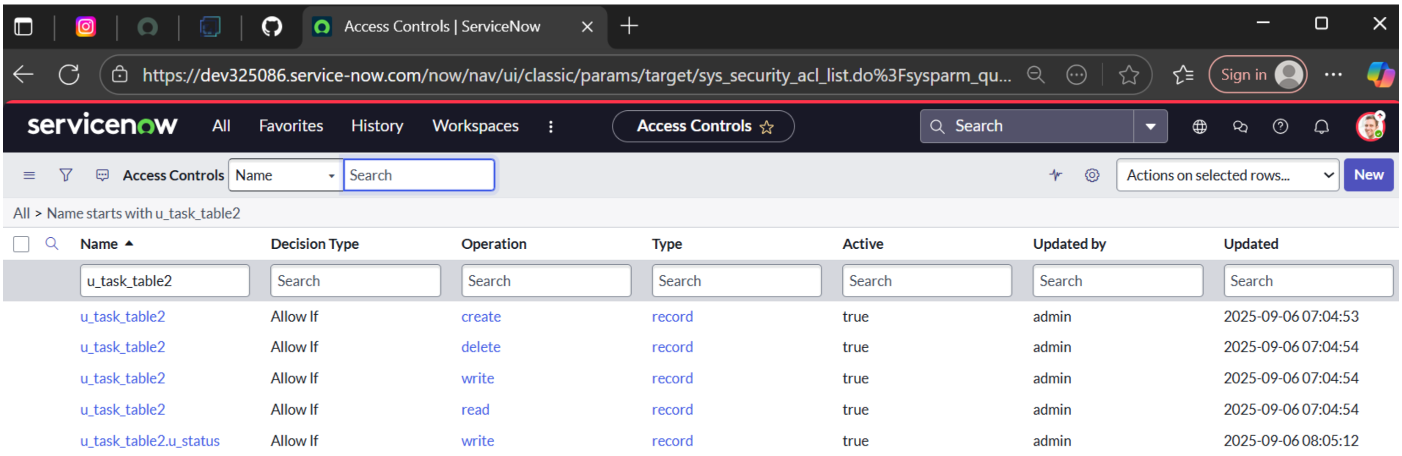

servicenow
All
Favorites
History
Admin
Application Menu - project table
Search
Application Menu
project table
Update
Delete
An application menu is a group of modules in the application navigator. Choose the roles that are required to access the application and add or remove modules in the related list below. More Info
Title
project table
Application
Global
Active
Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.
Roles
Project member, Team member, u_project_table_user
Specifies the menu category, which defines the navigation menu style. The default value is Custom Applications.
Category
Custom Applications
The text that appears in a tooltip when a user points to this application menu
Hint
Description
Update
Delete
Modules
Order
Search
Actions on selected rows...
New
Application menu = project table
Title
Table
Active
Filter
Order
Link type
Device type
Roles
Updated


- Student
project table | Application Menu |
https://dev325086.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D184a44c2933f2210951d30a97bb...
Sign in
servicenow
All
Favorites
History
Application Menu - project table
Search
Application Menu
project table
Update
Delete
Roles
Available
Selected
access_analyzer_admin
action_category_creator
action_designer
activity_admin
activity_creator
actsub_admin
actsub_user
admin
agent_admin
u_project_table_user
Project member
Team member
Done
Category
Custom Applications
The text that appears in a tooltip when a user points to this application menu
Hint
Description
Update
Delete
32°C
Sunny
Search
ENG
IN
19:09
06-09-2025

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

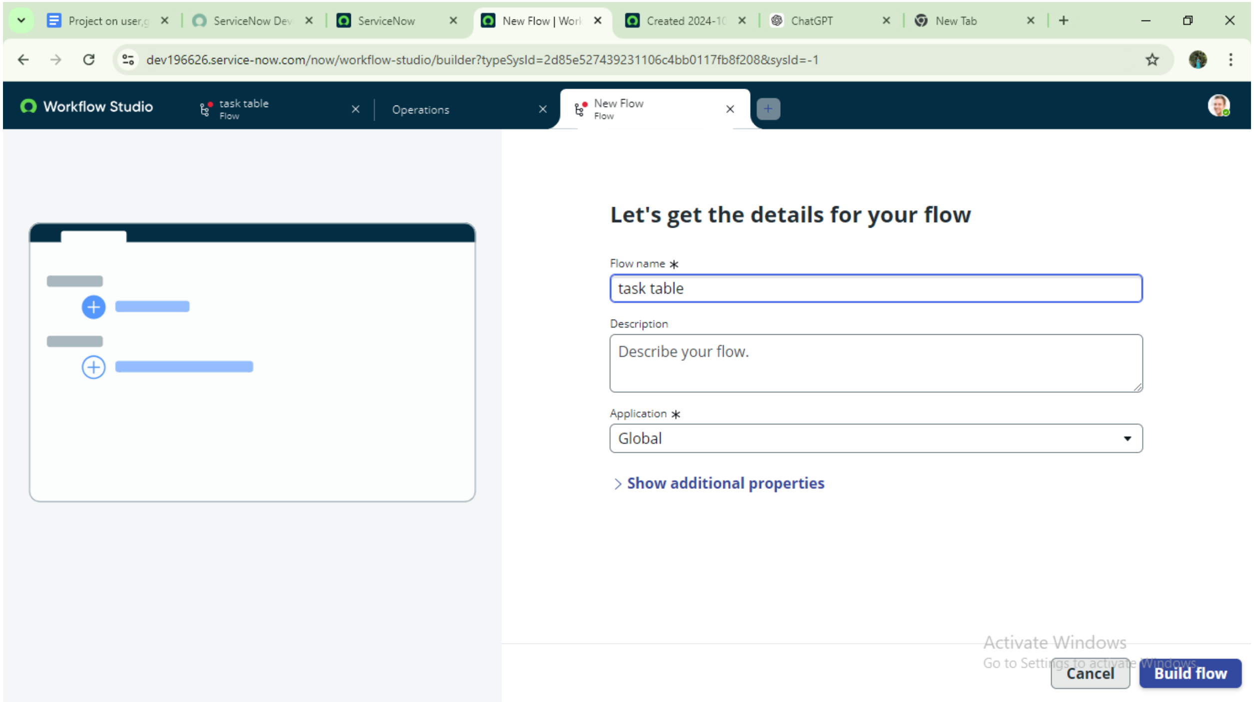
15.Go to all and select task table2 in the application menu bar

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.



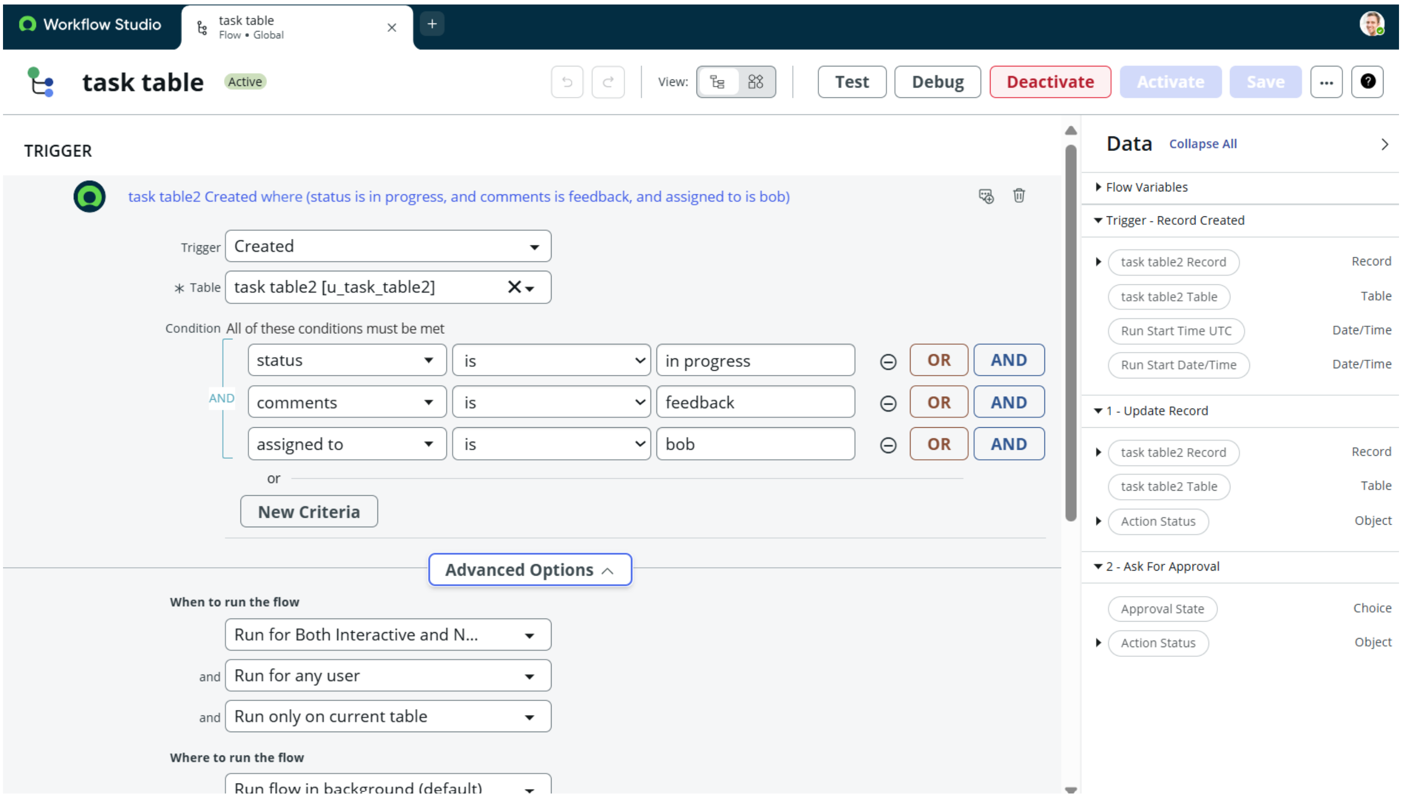
next step:

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

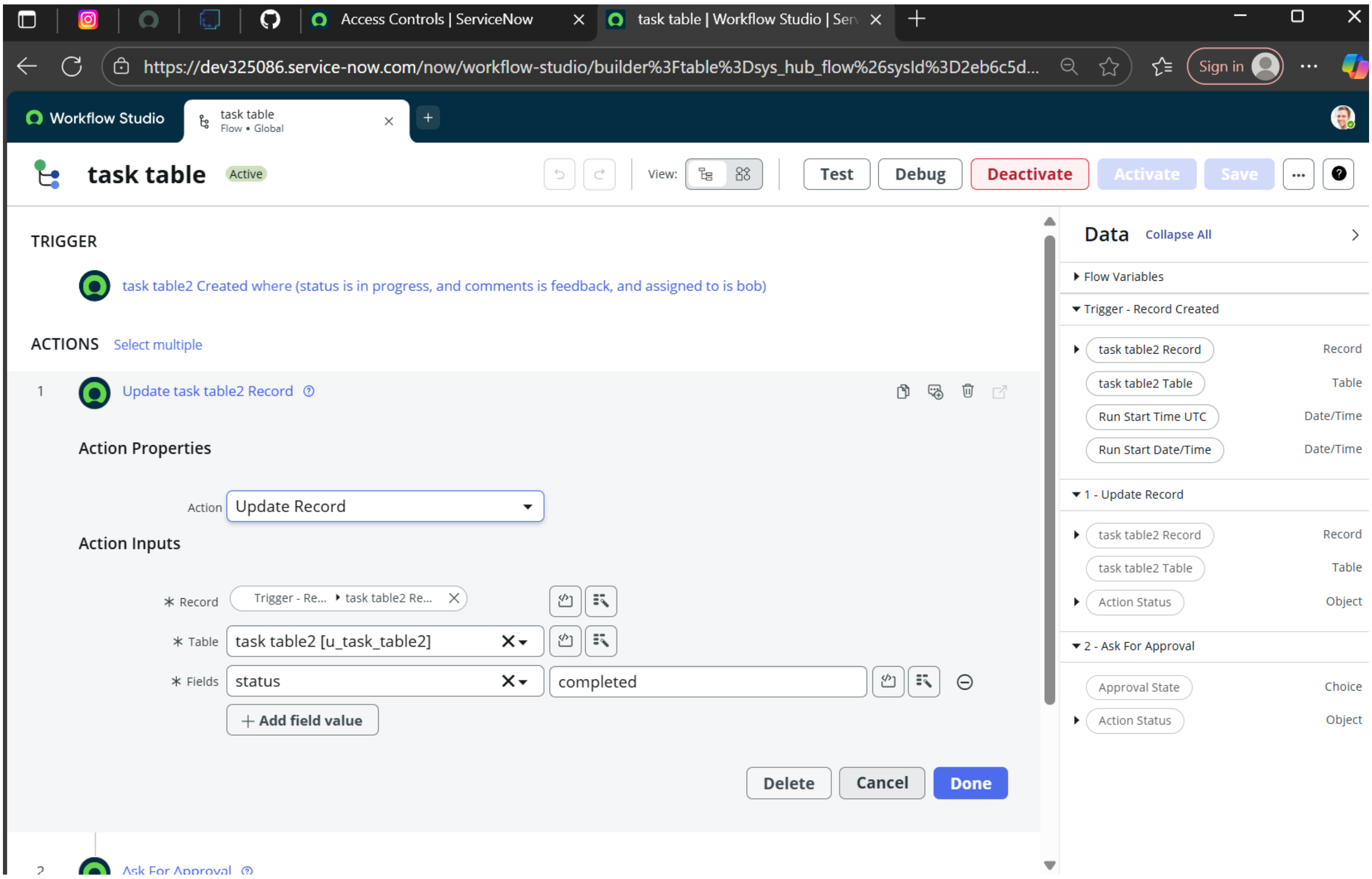
   Field : assigned to Operator :is Value : bob

5. After that click on Done.



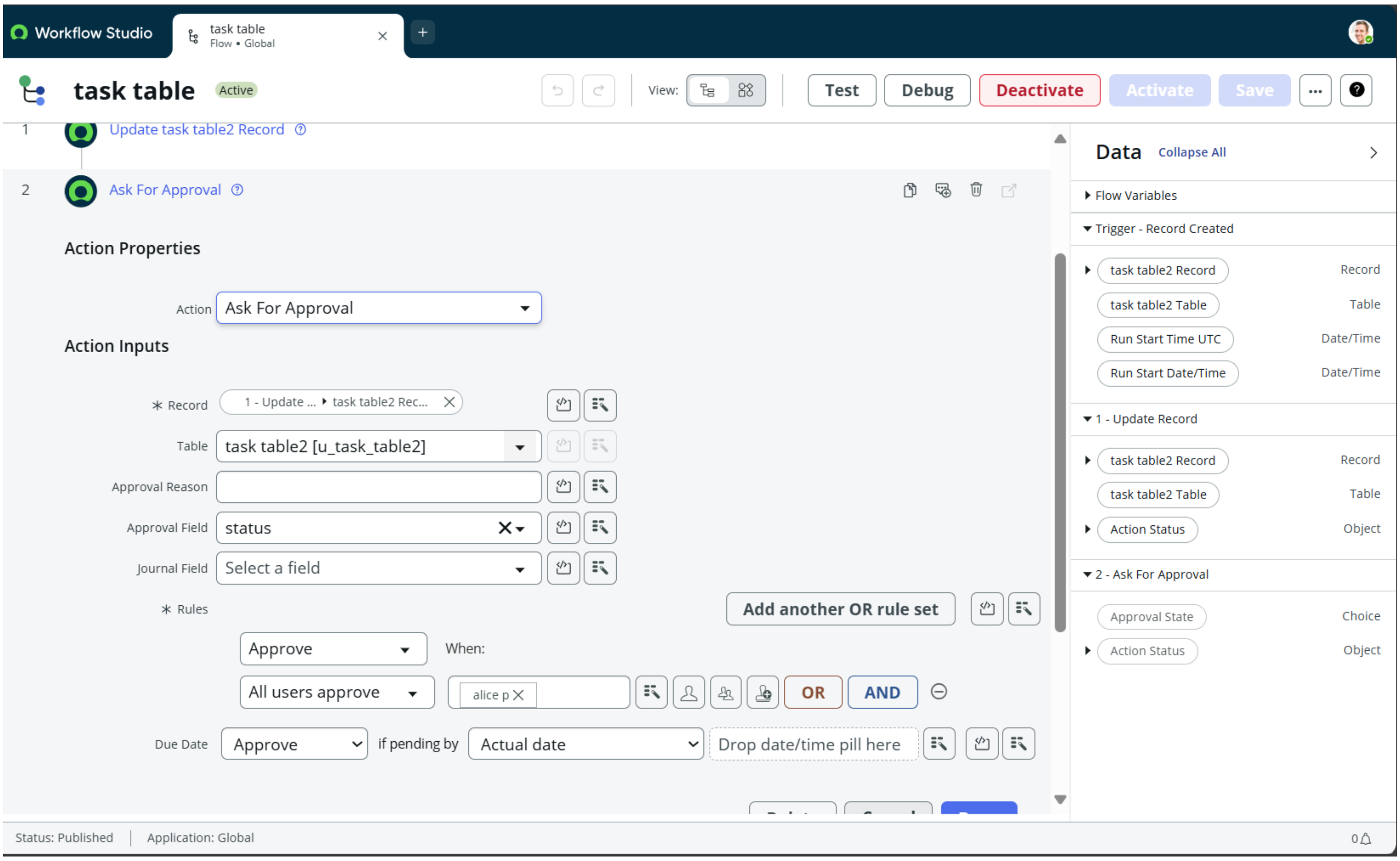
Next step:

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.



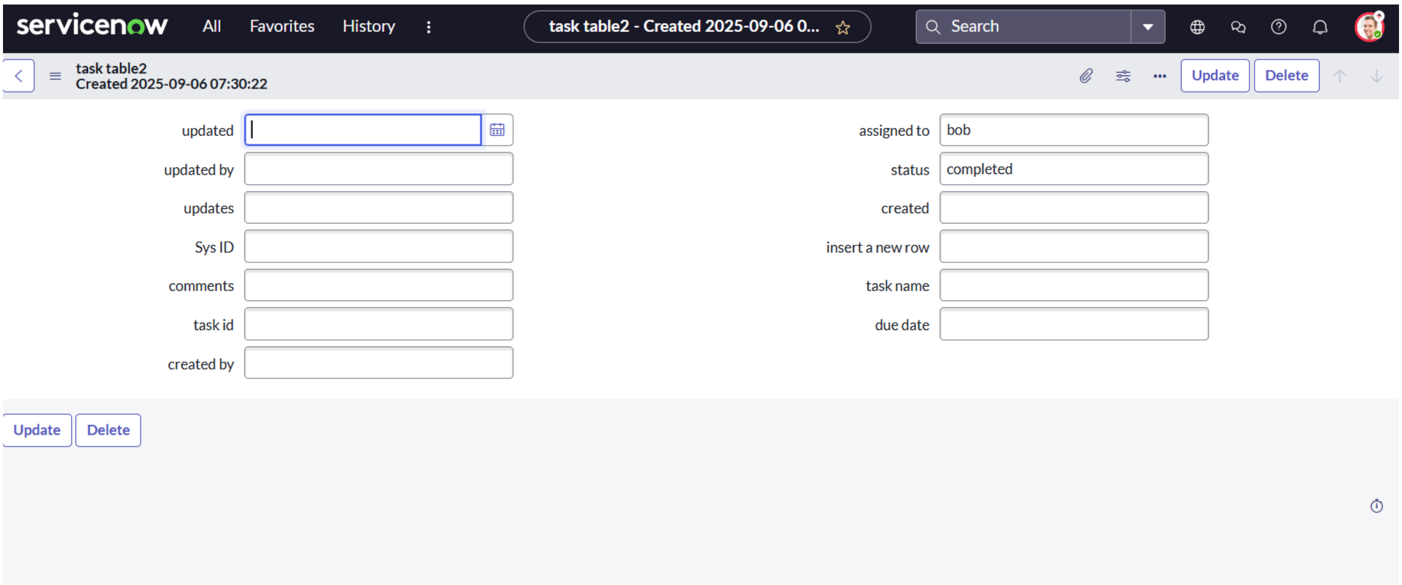
Next step:

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.

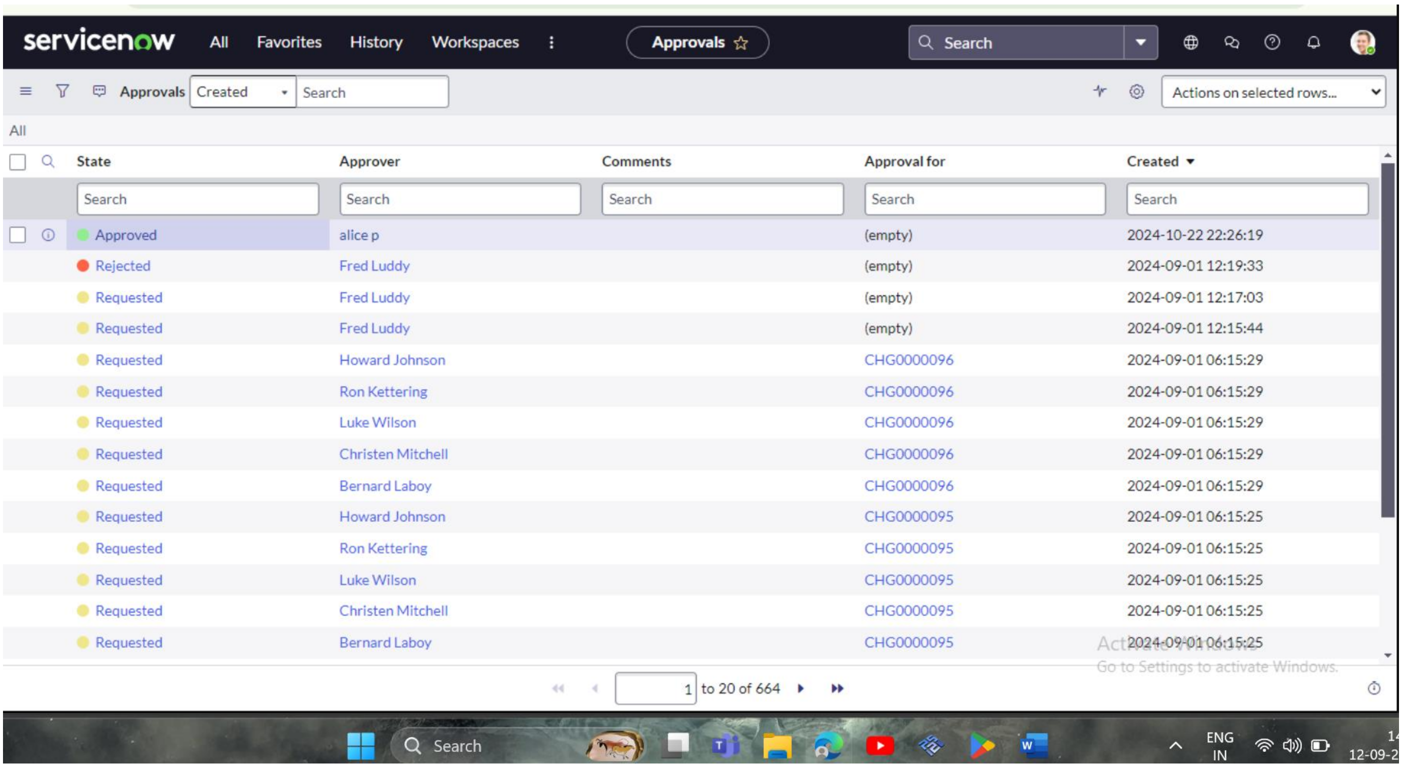
10.It status field is updated to completed



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



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.