

## 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.

The screenshot shows the ServiceNow user management interface for a user named 'alice p'. The form is divided into two main sections: personal information and system settings. The personal information section includes fields for User ID (alice), First name (alice), Last name (p), Title, and Department. There are also checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), and 'Internal Integration User'. The system settings section includes fields for Email (alice@gmail.com), Identity type (Human), Language (None), Calendar integration (Outlook), Time zone (System (America/Los\_Angeles)), Date format (System (yyyy-MM-dd)), Business phone, and Mobile phone. There is a 'Photo' field with a 'Click to add...' link. Below the form are buttons for 'Update', 'Set Password', and 'Delete'. A 'Related Links' section contains links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the bottom, there is a tabbed interface with 'Entitled Custom Tables' selected, showing a table with columns 'Table', 'Application', and 'Role'.

User ID:

First name:

Last name:

Title:

Department:

Password needs reset: ☐

Locked out: ☐

Active: ☒

Internal Integration User: ☐

Email:

Identity type:

Language:

Calendar integration:

Time zone:

Date format:

Business phone:

Mobile phone:

Photo: [Click to add...](#)

[Update](#) [Set Password](#) [Delete](#)

**Related Links**

[View linked accounts](#)

[View Subscriptions](#)

[Reset a password](#)

**Entitled Custom Tables** Roles (3) Groups (1) Delegates Subscriptions User Client Certificates

Table Search

User = alice p

Table	Application	Role
-------	-------------	------

Create one more user:

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

The screenshot shows the ServiceNow user management interface for a user named 'Bob p'. The form is divided into two main sections: personal information and system settings. The personal information section includes fields for User ID (Bob), First name (Bob), Last name (p), Title, and Department. There are also checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), and 'Internal Integration User'. The system settings section includes fields for Email (bob@gmail.com), Identity type (Human), Language (None), Calendar integration (Outlook), Time zone (System (America/Los\_Angeles)), Date format (System (yyyy-MM-dd)), Business phone, and Mobile phone. There is a 'Photo' field with a 'Click to add...' link. Below the form are buttons for 'Update', 'Set Password', and 'Delete'. A 'Related Links' section contains links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the bottom, there is a tabbed interface with 'Entitled Custom Tables' selected, showing a table with columns 'Table', 'Application', and 'Role'.

User ID:

First name:

Last name:

Title:

Department:

Password needs reset: ☐

Locked out: ☐

Active: ☒

Internal Integration User: ☐

Email:

Identity type:

Language:

Calendar integration:

Time zone:

Date format:

Business phone:

Mobile phone:

Photo: [Click to add...](#)

[Update](#) [Set Password](#) [Delete](#)

**Related Links**

[View linked accounts](#)

[View Subscriptions](#)

[Reset a password](#)

**Entitled Custom Tables** Roles (2) Groups (1) Delegates Subscriptions User Client Certificates

Table Search

User = Bob p

Table	Application	Role
-------	-------------	------

servicenow All Favorites History Workspaces Users ☆ Search

Users Created Search Actions on selected rows... New

Primary email device created for Bob p

All

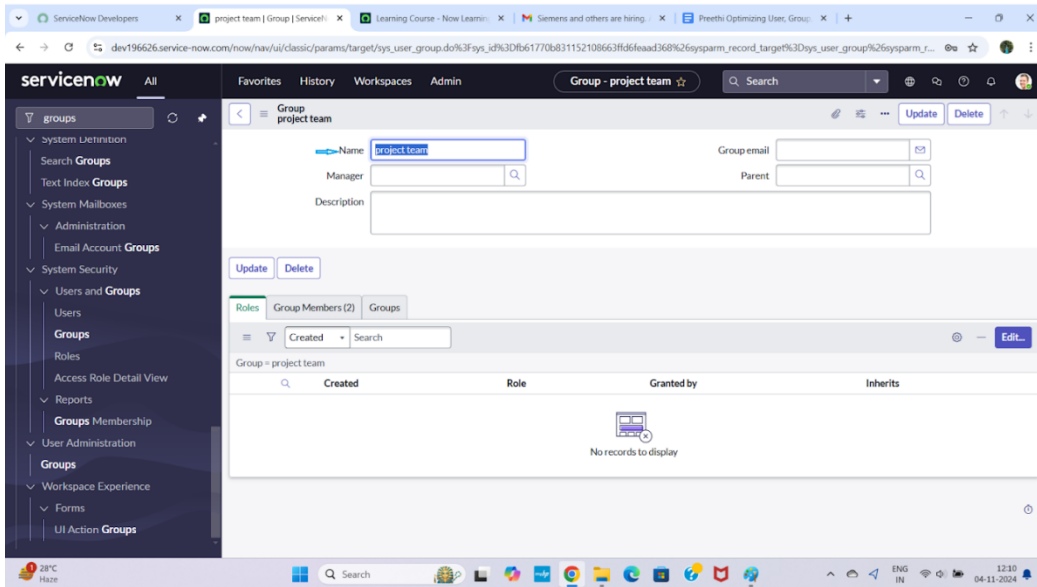
User ID	Name	Email	Active	Created	Updated
Bob	Bob p	bob@gmail.com	true	2025-09-06 05:21:34	2025-09-06 05:21:34
alice	alice p	alice@gmail.com	true	2025-09-06 05:18:30	2025-09-06 05:18:30
aes.creator	Creator User		true	2025-09-05 22:49:23	2025-09-06 01:06:43
Help Desk	User 1	help.desk@example.com	true	2025-08-03 02:52:08	2025-09-05 22:21:12
manifah.masood	Manifah Masood	manifah.masood@example.com	true	2025-07-31 09:13:35	2025-09-05 22:21:12
guillermo.frohlich	Guillermo Frohlich	guillermo.frohlich@example.com	true	2025-07-31 08:04:03	2025-09-05 22:21:14
securitycenter.user	Security Center Data Collection User		true	2025-07-27 17:10:39	2025-09-05 22:21:14
virtual.agent	Virtual Agent		true	2025-07-27 17:01:49	2025-09-05 22:21:13
andrew.och	Andrew Och	andrew.och@example.com	true	2025-07-27 09:45:02	2025-09-05 22:21:15
aqib.mushtaq	Aqib Mushtaq	aqib.mushtaq@example.com	false	2025-07-27 09:35:36	2025-09-05 22:21:13
arya.hajarha	Arya Hajarha	arya.hajarha@example.com	true	2025-07-27 09:32:04	2025-09-05 22:21:17
bushra.akhtar	Bushra Akhtar	bushra.akhtar@example.com	true	2025-07-27 09:25:39	2025-09-05 22:21:14

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## 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.



- Under new menu name : project table
- Under table columns give the columns
- Click on submit

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AllFavoritesHistoryWorkspaces

Table - project table

Search

DeleteUpdateDelete All Records

Table project table

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

\* Labelproject table

\* Nameu\_project\_table

ApplicationGlobal

Remote Table

ColumnsControlsApplication Access

Table ColumnsColumn labelSearch

1 to 7 of 7New

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Created	Date/Time	(empty)	40	40	false
Created by	String	(empty)	40	40	false
project id	String	(empty)	40	40	false
Sys ID	Sys ID (GUID)	(empty)	32	40	false
Updated	Date/Time	(empty)	40	40	false
Updated by	String	(empty)	40	40	false
Updates	Integer	(empty)	40	40	false
Insert a new row...					

DeleteUpdateDelete All Records

Related Links

## Create one more table:

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

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AllFavoritesHistoryWorkspaces

Table - project table

Search

DeleteUpdateDelete All Records

Table project table

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

\* Labelproject table

\* Nameu\_project\_table

ApplicationGlobal

Remote Table

ColumnsControlsApplication Access

Table ColumnsColumn labelSearch

1 to 7 of 7New

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Created	Date/Time	(empty)	40	40	false
Created by	String	(empty)	40	40	false
project id	String	(empty)	40	40	false
Sys ID	Sys ID (GUID)	(empty)	32	40	false
Updated	Date/Time	(empty)	40	40	false
Updated by	String	(empty)	40	40	false
Updates	Integer	(empty)	40	40	false
Insert a new row...					

DeleteUpdateDelete All Records

## 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

The screenshot shows the ServiceNow interface for the 'Group - Project team'. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and a search bar. The main content area has a form for group details with fields for Name (Project team), Manager, Group email, Parent, and Description. Below the form is a table of group members. The 'Group Members (2)' tab is selected, showing a list of users: 'User', 'Bob p', and 'alice p'. The 'alice p' row is highlighted. The bottom of the page shows a pagination bar indicating '1 to 2 of 2'.

## 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.

servicenow

All
Favorites
History
Workspaces

User - alice p

Search

User

alice p

Update

Set Password

Delete

First name

alice

Identity type

Human

Last name

p

Language

-- None --

Title

Calendar integration

Outlook

Department

Time zone

System (America/Los\_Angeles)

Date format

System (yyyy-MM-dd)

Locked out

☐

Business phone

Active

☒

Mobile phone

Internal Integration User

☐

Photo

Click to add...

Update

Set Password

Delete

Related Links

[View linked accounts](#)
[View Subscriptions](#)
[Reset a password](#)

Entitled Custom Tables

Roles (3)

Groups (1)

Delegates

Subscriptions

User Client Certificates

Role

Search

Actions on selected rows...

Edit...

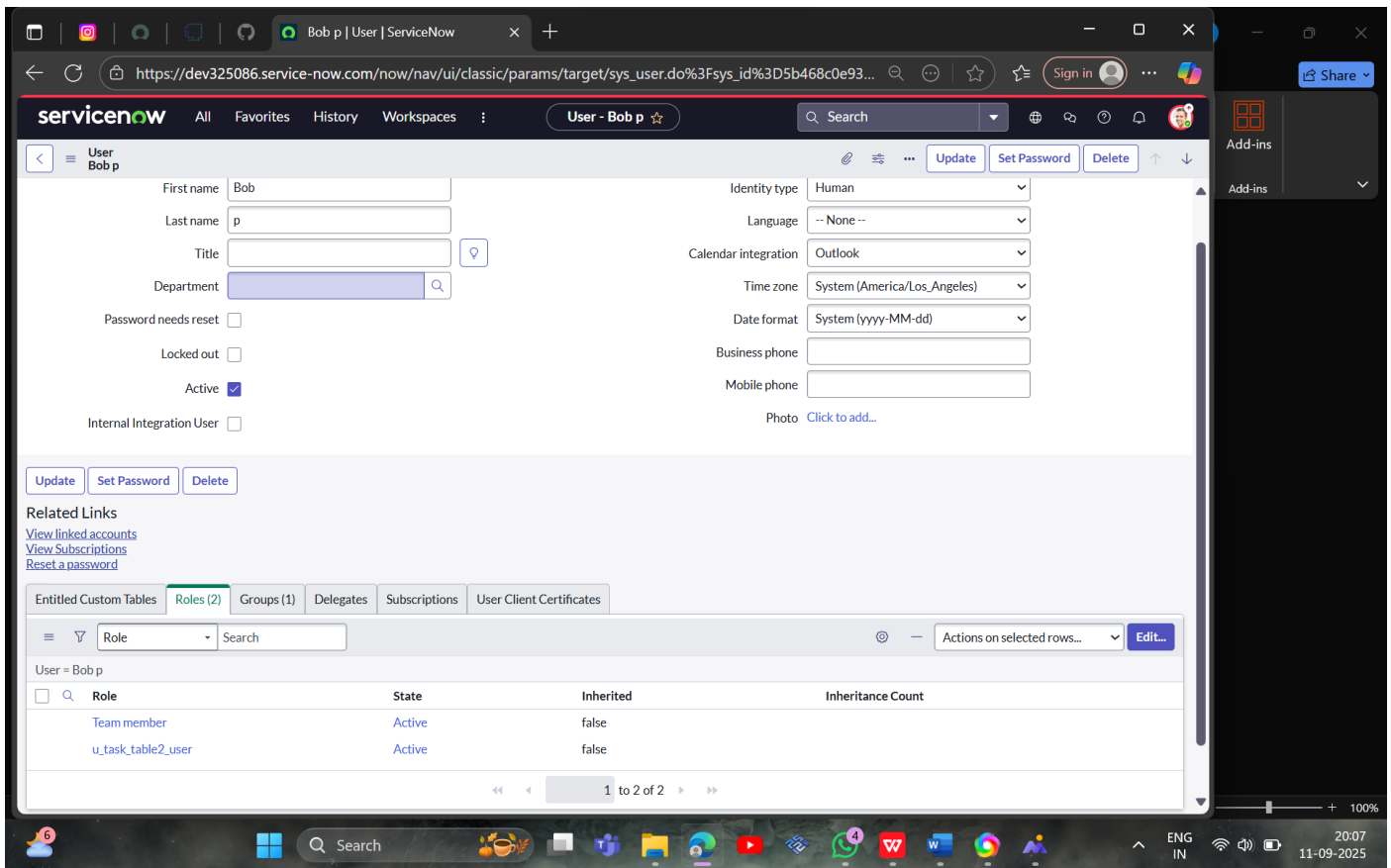
User = alice p

Role	State	Inherited	Inheritance Count
u_project_table_user	Active	false	
Project member	Active	false	
u_task_table2_user	Active	false	

## 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

AllFavoritesHistoryAdmin

Application Menu - project table

Search

UpdateDelete

Application Menu project table

UpdateDelete

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](#)

\* Titleproject table

ApplicationGlobal

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.

CategoryCustom Applications

The text that appears in a tooltip when a user points to this application menu

Hint

Description

UpdateDelete

ModulesOrderSearch

Actions on selected rows...New

Application menu = project table

Title	Table	Active	Filter	Order	Link type	Device type	Roles	Updated
-------	-------	--------	--------	-------	-----------	-------------	-------	---------

project table | Application Menu

https://dev325086.service-now.com/now/nav/ui/classic/params/target/sys\_app\_application.do%3Fsys\_id%3D184a44c2933f2210951d30a97bb...

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AllFavoritesHistoryAdmin

Application Menu - project table

Search

UpdateDelete

Application Menu project table

UpdateDelete

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](#)

\* Titleproject table

ApplicationGlobal

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.

CategoryCustom Applications

The text that appears in a tooltip when a user points to this application menu

Hint

Description

UpdateDelete

Available

Selected

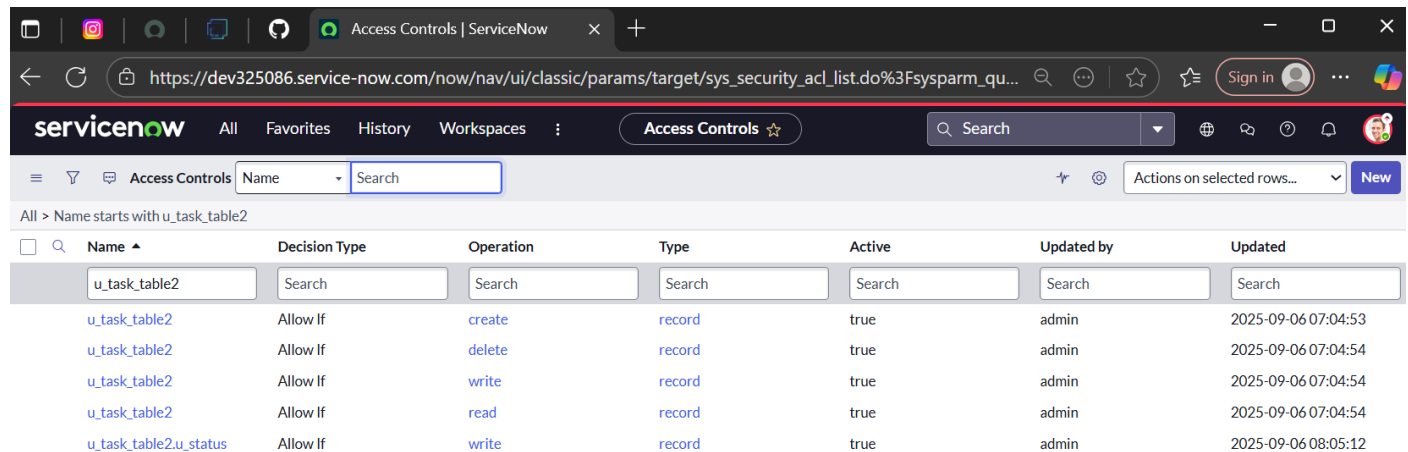
Done

access_analyzer_admin	u_project_table_user
action_category_creator	Project member
action_designer	Team member
activity_admin	
activity_creator	
actsub_admin	
actsub_user	
admin	
agent_admin	

## 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



The screenshot shows the ServiceNow 'Access Controls' page. The breadcrumb trail is 'All > Name starts with u\_task\_table2'. The table below lists the ACLs for 'u\_task\_table2'.

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_task_table2	Search	Search	Search	Search	Search	Search
u_task_table2	Allow If	create	record	true	admin	2025-09-06 07:04:53
u_task_table2	Allow If	delete	record	true	admin	2025-09-06 07:04:54
u_task_table2	Allow If	write	record	true	admin	2025-09-06 07:04:54
u_task_table2	Allow If	read	record	true	admin	2025-09-06 07:04:54
u_task_table2.u_status	Allow If	write	record	true	admin	2025-09-06 08:05:12

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.

Workflow Studio

task table Flow

Operations

New Flow Flow

### Let's get the details for your flow

Flow name \*  
task table

Description  
Describe your flow.

Application \*  
Global

> Show additional properties

Activate Windows  
Go to Settings to activate Windows

Cancel 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.

Workflow Studio task table Flow • Global

task table Active

View: [Icon] [Icon]

Test Debug Deactivate Activate Save ...

### TRIGGER

task table2 Created where (status is in progress, and comments is feedback, and assigned to is bob)

Trigger: Created

\* Table: task table2 [u\_task\_table2]

Condition: All of these conditions must be met

AND

status is in progress

OR AND

comments is feedback

OR AND

assigned to is bob

OR AND

or

New Criteria

Advanced Options ^

When to run the flow

Run for Both Interactive and N...

and Run for any user

and Run only on current table

Where to run the flow

Run flow in background (default)

### Data Collapse All

Flow Variables

Trigger - Record Created

task table2 Record Record

task table2 Table Table

Run Start Time UTC Date/Time

Run Start Date/Time Date/Time

1 - Update Record

task table2 Record Record

task table2 Table Table

Action Status Object

2 - Ask For Approval

Approval State Choice

Action Status Object

### 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.

The screenshot shows the ServiceNow Workflow Studio interface for a workflow named "task table". The workflow is currently "Active". The main configuration area is divided into "TRIGGER" and "ACTIONS" sections.

**TRIGGER:** A single trigger is configured: "task table2 Created where (status is in progress, and comments is feedback, and assigned to is bob)".

**ACTIONS:** The first action is "Update task table2 Record". The "Action Properties" section shows the action is "Update Record". The "Action Inputs" section is configured as follows:

- Record:** Trigger - Re... (task table2 Re...)
- Table:** task table2 [u\_task\_table2]
- Fields:** status (set to completed)

Buttons for "Delete", "Cancel", and "Done" are visible at the bottom of the action configuration.

**Data Panel (Right Side):** This panel shows the data flow and variables. It includes sections for "Flow Variables", "Trigger - Record Created", "1 - Update Record", and "2 - Ask For Approval".

### 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.

Workflow Studio interface showing the configuration of a "task table" flow. The flow consists of two steps: "Update task table2 Record" and "Ask For Approval". The "Ask For Approval" step is currently selected, showing its "Action Properties" and "Action Inputs".

**Action Properties:**

- Action: Ask For Approval

**Action Inputs:**

- \* Record: 1 - Update ... → task table2 Rec...
- Table: task table2 [u\_task\_table2]
- Approval Reason:
- Approval Field: status
- Journal Field: Select a field
- \* Rules:
  - Approve When: All users approve, alice p X
  - Due Date: Approve if pending by Actual date

The right sidebar shows the "Data" pane with a tree view of the flow variables, including "task table2 Record", "task table2 Table", "Run Start Time UTC", "Run Start Date/Time", "task table2 Record", "task table2 Table", "Action Status", "Approval State", and "Action Status".

9.Go to application navigator search for task table.

10.It status field is updated to completed

ServiceNow application navigator showing the "task table2" record. The record is titled "task table2 - Created 2025-09-06 07:30:22". The record details show the following fields:

- updated: I
- assigned to: bob
- status: completed
- created:
- insert a new row:
- task name:
- due date:

The "Update" and "Delete" buttons are visible at the bottom of the record details.

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

servicenow

AllFavoritesHistoryWorkspaces

Approvals

Search

Search

Actions on selected rows...

All

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

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Go to Settings to activate Windows.

## 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.