

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

Team ID: NM2025TMID16399

Team Size: 4

Team Leader: SUMATHI HANNAH. P

Team member: VEGANDHIKA. V

Team member: VIGNESHWARI. G

Team member: PRIYADHARSHINI.S

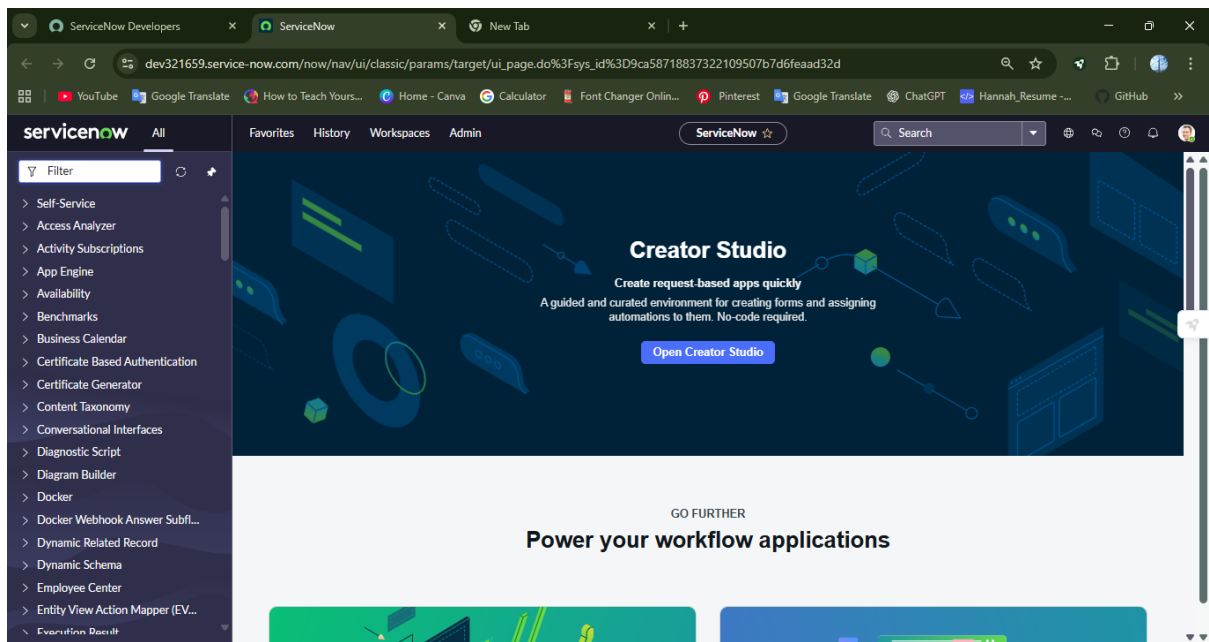
PROBLEM STATEMENT:

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 a structured workflow, leading to confusion regarding task assignments and progress tracking.

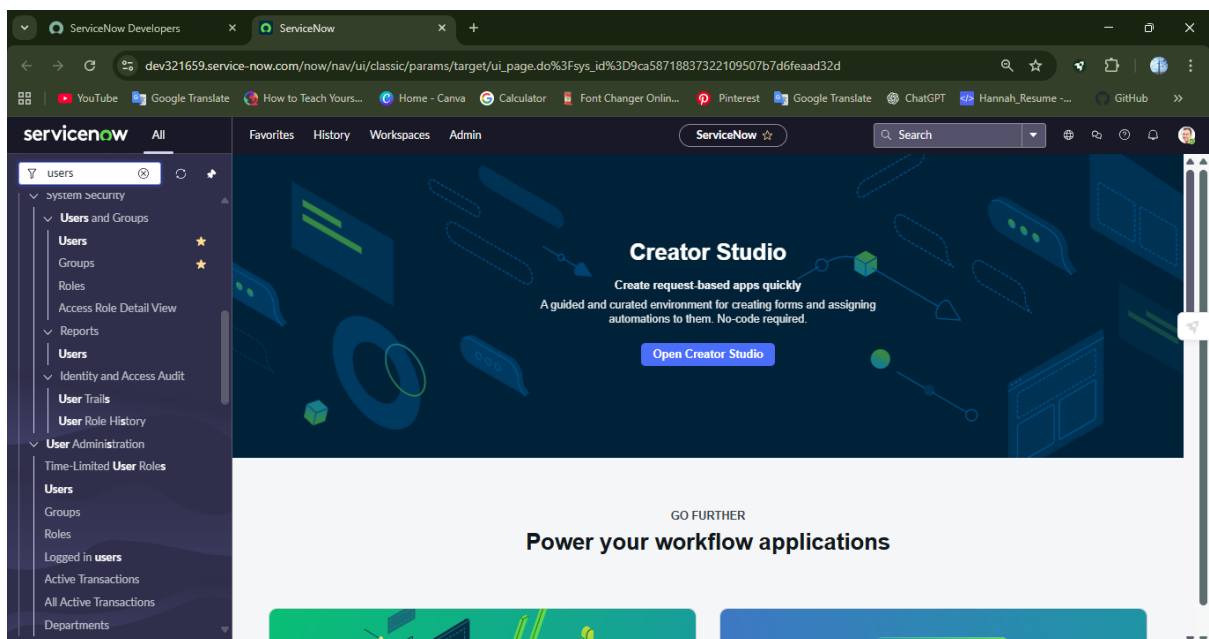
TASK INITIATION

Milestone 1 : User

1. Open the chrome and entering into “developers.servicenow.com”
2. Then use the required email and password to take the project to the next level.
3. You will see a page like this in below.



4. Select user from the left side which shows “ALL”.



5. After selecting the user under “System Security”.

6. Using the “New” in the top right corner.

User ID	Name	Email	Active	Created	Updated
abel.tuter	Abel Tuter	abel.tuter@example.com	true	2012-02-17 19:04:52	2025-09-01 08:22:48
abraham.lincoln	Abraham Lincoln	abraham.lincoln@example.com	true	2013-07-23 17:15:54	2025-09-01 08:22:49
adela.cervantsz	Adela Cervantsz	adela.cervantsz@example.com	true	2012-02-17 19:04:50	2025-09-01 08:22:45
alileen.mottern	Aileen Mottern	alileen.mottern@example.com	true	2012-02-17 19:04:49	2025-09-01 08:22:48
alejandra.prenatt	Alejandra Prenatt	alejandra.prenatt@example.com	true	2012-02-17 19:04:52	2025-09-01 08:22:46
alejandro.mascall	Alejandro Mascall	alejandro.mascall@example.com	true	2012-02-17 19:04:52	2025-09-01 08:22:49
alene.rabeck	Alene Rabeck	alene.rabeck@example.com	true	2012-02-17 19:04:53	2025-09-01 08:22:50
alfonso.griglen	Alfonso Griglen	alfonso.griglen@example.com	true	2012-02-17 19:04:51	2025-09-01 08:22:45
Alice	alice p	alice@gmail.com	true	2025-09-01 10:22:18	2025-09-01 10:22:18
alissa.mountjoy	Alissa Mountjoy	alissa.mountjoy@example.com	true	2012-02-17 19:04:52	2025-09-01 08:22:48
allan.schwandt	Allan Schwandt	allan.schwandt@example.com	true	2012-02-17 19:04:53	2025-09-01 08:22:49
allie.pumhrev	Allie Pumhrev	allie.pumhrev@example.com	true	2012-02-17 19:04:52	2025-09-01 08:22:49

Activity 1 : Create Users

7. Filling up the details of the user will be the next step.

1. User ID : alice
2. First Name : Alice
3. Last Name : P
4. Email : alice@gmail.com

8. Click “Submit” after filling the details of Alice.

9. The user Alice P will be created.

User - New Record

To set up the User's password, save the record and then click Set Password.

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...](#)

Related Links
[View linked accounts](#)
[View Subscriptions](#)

Create one more user:

10. Filling up the details of the another new user will be the next step.

1. User ID : bob
2. First Name : Bob
3. Last Name : P
4. Email : bob@gmail.com

ServiceNow Developers x Student x New Record | User | ServiceNow x +

dev321659.service-now.com/now/nav/ui/classic/params/target/sys_user.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys_user%26sys...

serviceNow All Favorites History Workspaces Admin User - New Record Search

User - New Record Submit

To set up the User's password, save the record and then click Set Password.

User ID: bo

First name: Bob

Last name: P

Title: ?

Department: ?

Password needs reset: ☐

Locked out: ☐

Active: ☒

Internal Integration User: ☐

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:

Mobile phone:

Photo: Click to add...

Submit

Related Links

[View linked accounts](#)

[View Subscriptions](#)

11. Same as the last step, click the submit button after filling the required details of the users.

Milestone 2 : Groups

Activity 1 : Create Group

1. Click on “All”.
2. Search for Groups under “System Security”.

Name	Description	Active	Manager	Parent	Updated
Analytics Settings Managers	Group for all people who have the Ana...	true	(empty)	(empty)	2020-03-17 04:39:14
App Engine Admins	Users who can review and approve tasks r...	true	(empty)	(empty)	2021-06-28 12:12:44
Application Development	Team Develops ITSM Applications in London	true	Bushra Akhtar	(empty)	2025-07-27 09:42:02
ATF Service Level Management Group		true	(empty)	(empty)	2019-07-13 09:01:15
ATF_TestGroup_Network	ATF_TestGroup_Network	true	(empty)	(empty)	2018-08-30 01:35:11
ATF_TestGroup_ServiceDesk	ATF_TestGroup_ServiceDesk	true	(empty)	(empty)	2018-08-30 01:35:35
Business Application Registration Approv...	Approval group for Business Application ...	true	(empty)	(empty)	2020-07-28 21:02:26
CAB Approval	CAB approvers	true	(empty)	(empty)	2011-09-30 09:30:34
Capacity Mgmt		true	(empty)	(empty)	2023-11-29 17:40:19
Catalog Request Approvers > \$1000	This is the group of users that need to ...	true	(empty)	(empty)	2020-12-27 17:11:42
Catalog Request Approvers for Sales	This is a group of users that need to ap...	true	(empty)	(empty)	2020-12-27 17:11:50
Change Management	Change Management Group	true	(empty)	(empty)	2015-06-09 22:35:12
Database		true	Don Goodliffe	(empty)	2022-10-02 19:02:18

3. Click “New”

4. Filling up the details of the user will be the next step

Name : Project team

Group - New Record

Name:

Group email:

Manager:

Parent:

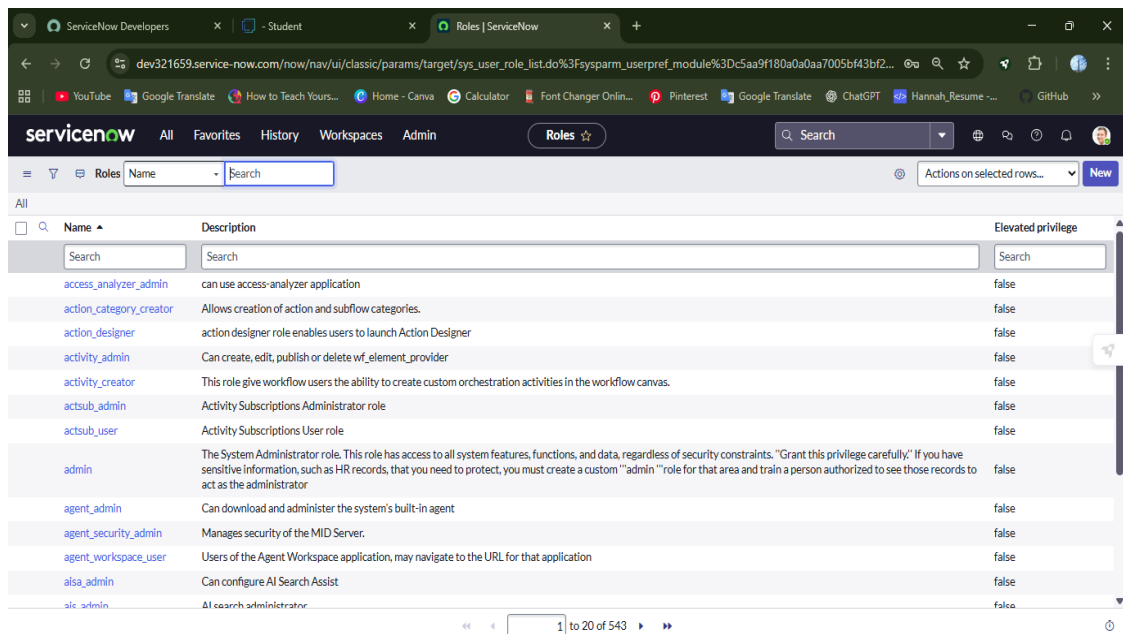
Description:

5. Click on Submit.

Milestone 3 : Roles

Activity 1 : Create Roles

1. Click on “All”.
2. Search for role under System Security.



3. Click on “New”.
4. Fill in the given below details to create a new role.

Name: Project member

The screenshot shows the 'Role - New Record' form in ServiceNow. The 'Name' field is filled with 'project member'. The 'Application' dropdown is set to 'Global'. The 'Elevated privilege' checkbox is unchecked. The 'Description' field is empty. A 'Submit' button is visible at the bottom left.

* Name:

Application:

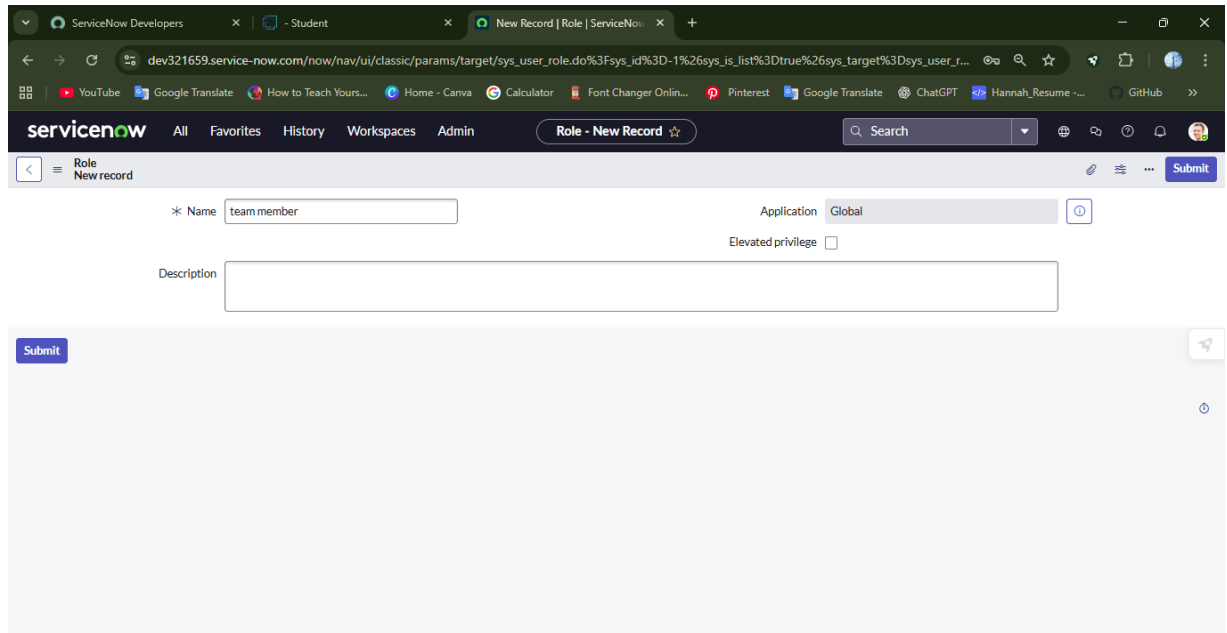
Elevated privilege: ☐

Description:

Create one more role:

5. Create another role with the following details.

Name : Team Member



6. Click on Submit.

Milestone 4 : Table

Activity 1: Create table

1. Click on all
2. Search for tables.
3. Click for “New”.
4. Fill the following details to create a new table

Label : Project table.

5. Check the boxes ‘Create Module & Create mobile Module’
6. Under new menu name : Project table
7. Under table columns give the columns

Table - New Record

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](#)

* Label: project table

* Name: u_project_table

Extends table:

Application: Global

Create module: ☒

Create mobile module: ☒

Add module to menu: -- Create new --

New menu name: project table

Remote Table: ☐

Columns Controls Application Access

Table Columns for text Search

Column label	Type	Reference	Max length	Default value	Display
Insert a new row...					

Table - project table

Table Columns for text Search

Column label	Type	Reference	Max length	Default value	Display
Updated	Date/Time	(empty)	40	40	false
project id	Integer	(empty)	40	40	false
Created by	String	(empty)	40	40	false
project name	String	(empty)	40	40	false
Created	Date/Time	(empty)	40	40	false
Sys ID	Sys ID (GUID)	(empty)	32	40	false
project manager	String	(empty)	40	40	false
Updated by	String	(empty)	40	40	false
Updates	Integer	(empty)	40	40	false
decription	String	(empty)	40	40	false
end date	Date	(empty)	40	40	false
start date	Date	(empty)	40	40	false
status	Choice	(empty)	40	40	false

1 to 13 of 13

New

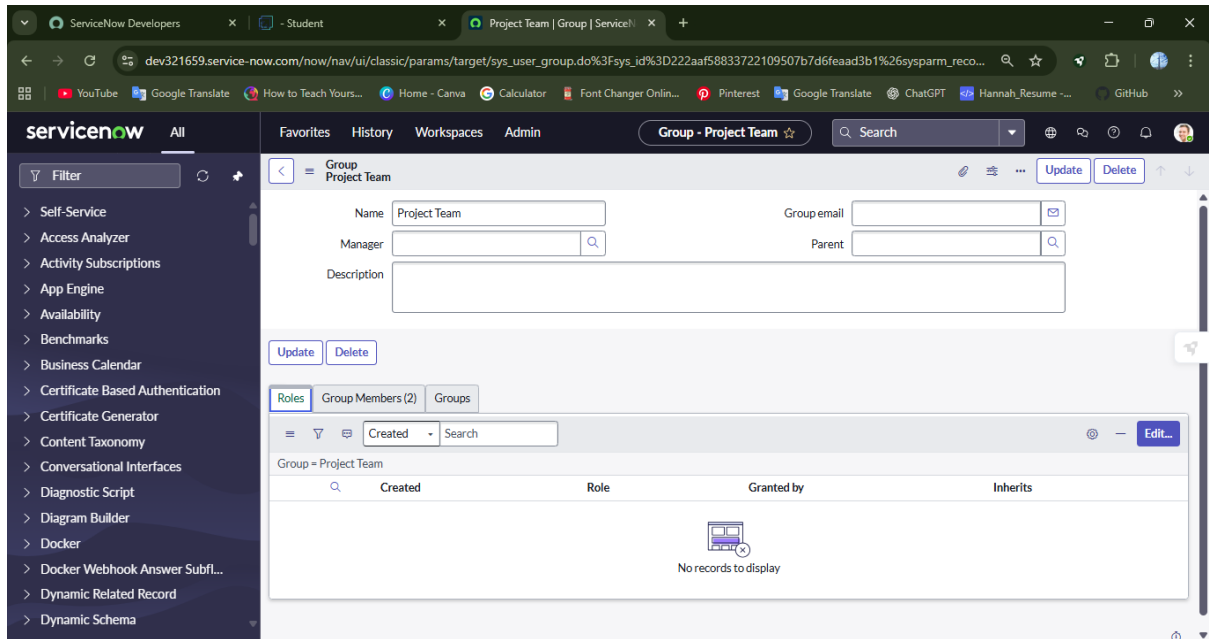
Create another table

8. Create another table as : “task table 1” and fill in the following details
9. Click Submit.

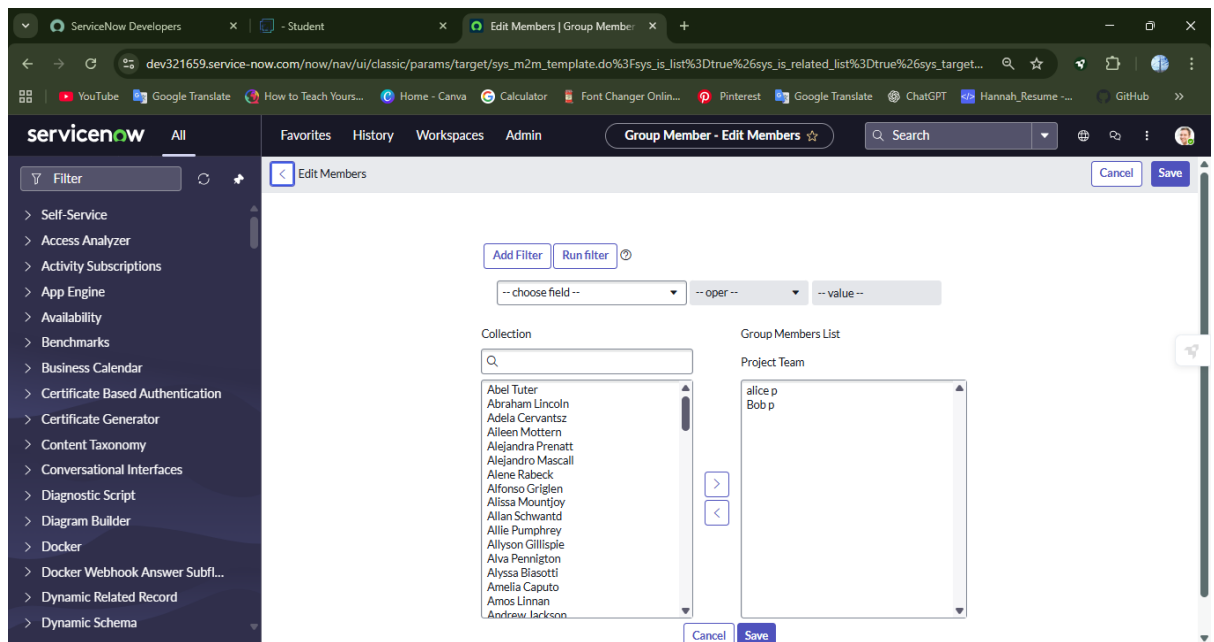
Milestone 5 : Assigned users to groups

Activity 1 : Assign users to project team group.

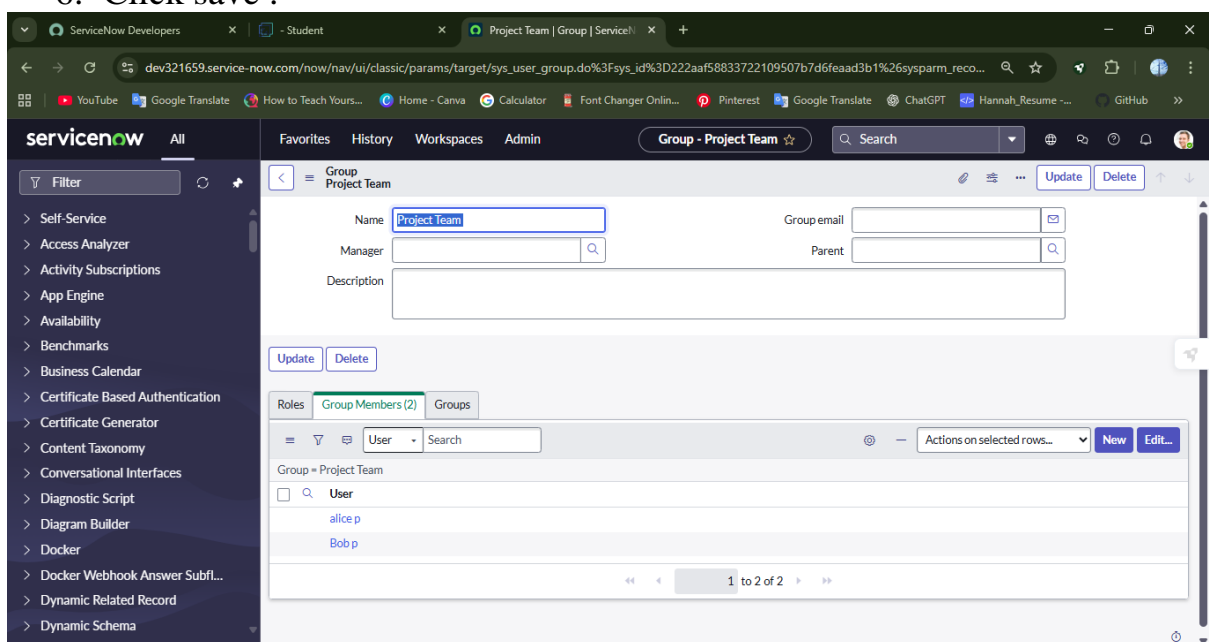
1. Click “All”.
2. Search for groups under System definition
3. Select the “**Project team**” group



4. Click on Edit.
5. Select Alice P and Bob P



6. Click save .

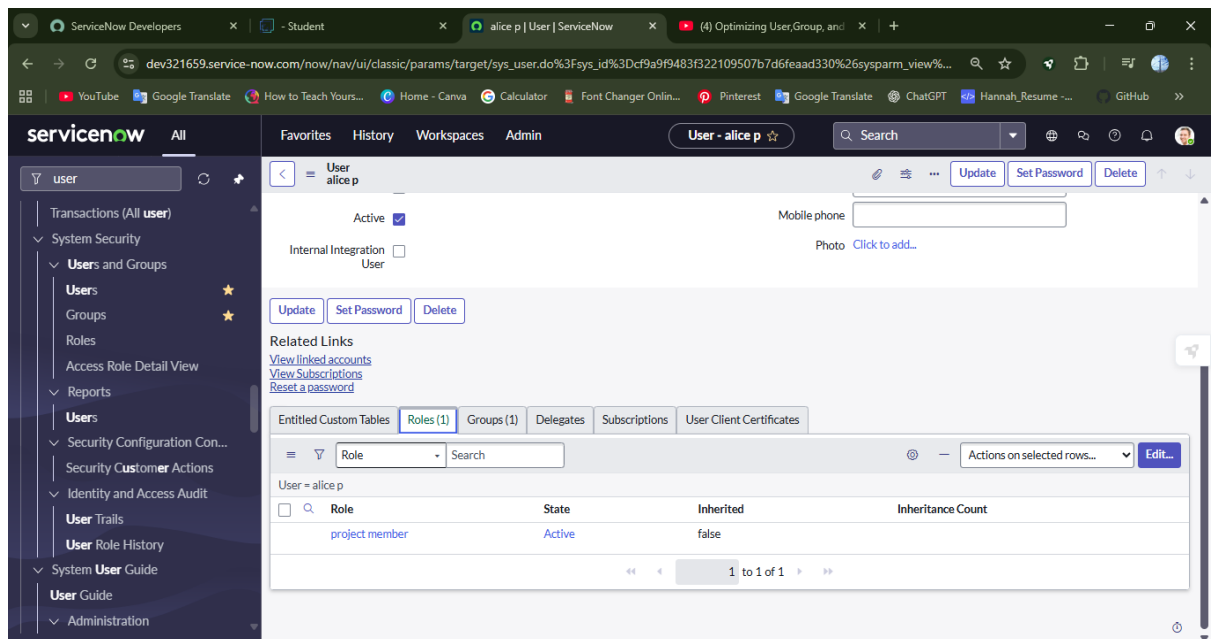


Milestone 6 :

Activity 1: Assign Roles to Alice user.

1. Click all

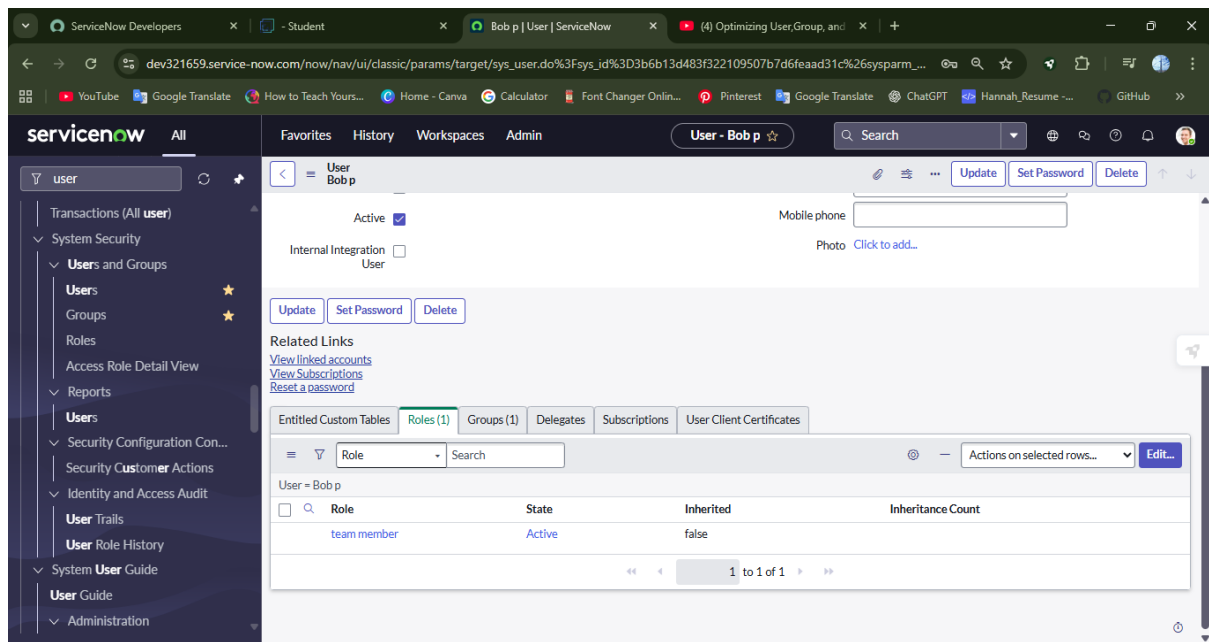
2. Select users under System definition
3. Select Alice P >> Roles
4. Select edit and give “Project member”



5. Click “Update”

Activity 2: Assign Roles to Bob user.

1. Search for bob p under users in System Definition
2. Under the roles, click edit,
3. Select “team member”



4. Click “Update” in the top.

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 Developers | Student | New Record | Application Menu

dev321659.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys...

application menu

FAVORITES
No Results

ALL RESULTS
System Definition
Application Menus

Application Menu - New Record

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

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:

Submit

ServiceNow Developers | Student | New Record | Application Menu

dev321659.service-now.com/now/nav/ui/classic/params/target/sys_app_application.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys...

application menu

FAVORITES
No Results

ALL RESULTS
System Definition
Application Menus

Application Menu - New Record

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: task_table_2 Application: Global Active: ☒

Restricts access to the specified roles. Otherwise, all users can view the application menu when it is active.

Roles: u_task_table_2_user, project member, team member

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:

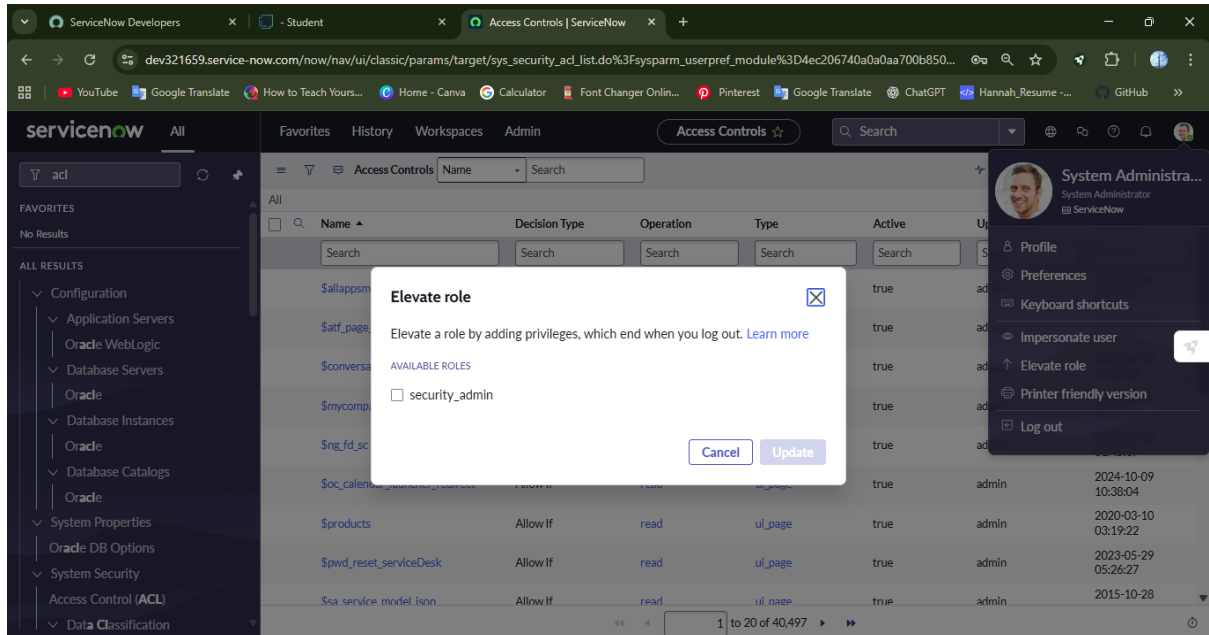
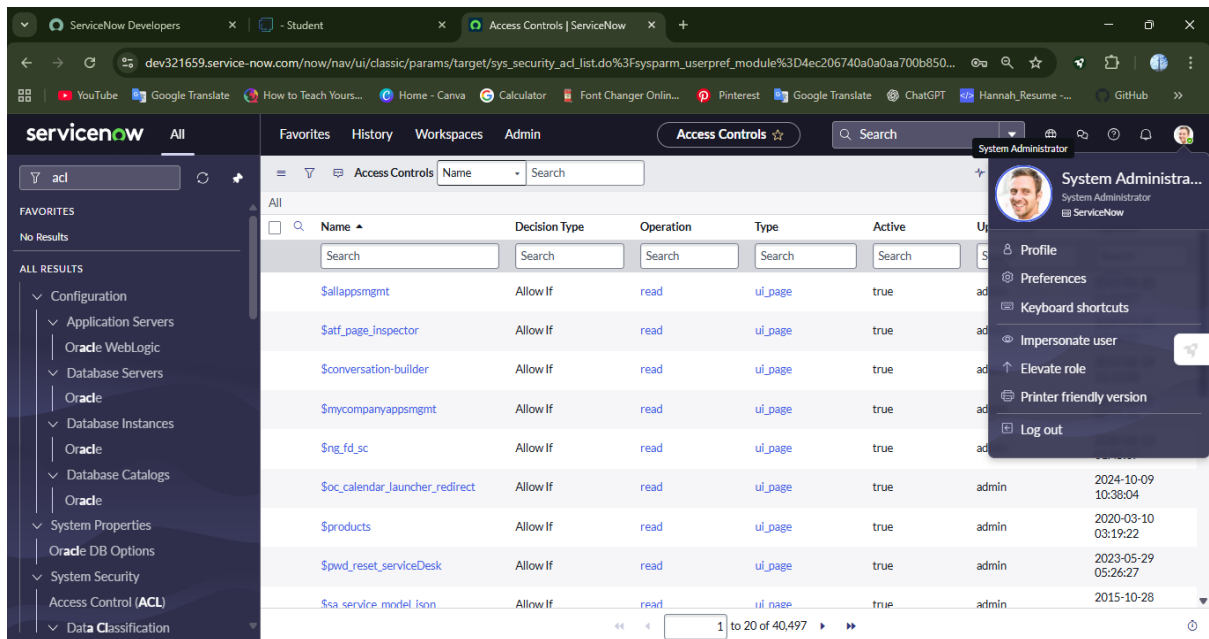
Description:

Submit

Milestone 8 : Access control list

Activity 1: Create ACL

1. Click all
2. Search for ACL under System Security
3. Click “Elevate Role”



4. Fill the following details to create a new ACL
5. Scroll down under requires role
6. Double click on insert a new row
7. Give task table and team member role

8. Click on submit

9. Similarly create 4 ACL for the following fields

The screenshot shows the ServiceNow 'Access Control - New Record' form. The form is configured with the following settings:

- Type:** record
- Operation:** write
- Decision Type:** Allow If
- Admin overrides:** ☒
- Protection policy:** -- None --
- Name:** task table 2 [u_task_table_2]
- Assigned to:** assigned to
- Application:** Global
- Active:** ☒
- Advanced:** ☐

The 'Applies To' section shows 'No of records matching the condition: 0'. Below this, there are buttons for 'Add Filter Condition' and 'Add OR Clause'. The 'Conditions' section contains a warning message and a 'Requires role' table with one role listed: 'team member'.

The screenshot shows the ServiceNow 'Access Control - New Record' form, similar to the one above, but with the 'Assigned to' field changed to 'due date'.

- Type:** record
- Operation:** write
- Decision Type:** Allow If
- Admin overrides:** ☒
- Protection policy:** -- None --
- Name:** task table 2 [u_task_table_2]
- Assigned to:** due date
- Application:** Global
- Active:** ☒
- Advanced:** ☐

The 'Applies To' section shows 'No of records matching the condition: 0'. Below this, there are buttons for 'Add Filter Condition' and 'Add OR Clause'. The 'Conditions' section contains a warning message and a 'Requires role' table with one role listed: 'team member'.

ServiceNow Developers | Student | New Record | Access Control |

dev321659.service-now.com/now/nav/ui/classic/params/target/sys_security_ad.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys_security...

Filter

Access Control - New Record

Warning: A role, security attribute, data condition, script or ACL control via reference fields is required to properly secure access with this ACL.

* Type: record

* Operation: write

Decision Type: Allow If

Admin overrides: ☒

Protection policy: -- None --

* Name: task table 2 [u_task_table_2]

Description:

Applies To: No. of records matching the condition: 0

Add Filter Condition Add OR Clause

-- choose field -- -- oper -- -- value --

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

1. Allow Access: Allows access to a resource if all conditions are met. Additional ACLs may grant access to records where this ACL has not granted access.

2. Deny Access: Denies access to a resource unless all conditions are met. Additional ACLs may not grant access to records where this ACL has denied access.

More Info

Requires role

Role
team member

Insert a new row...

ServiceNow Developers | Student | New Record | Access Control |

dev321659.service-now.com/now/nav/ui/classic/params/target/sys_security_ad.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Dsys_security...

Filter

Access Control - New Record

Warning: A role, security attribute, data condition, script or ACL control via reference fields is required to properly secure access with this ACL.

* Type: record

* Operation: create

Decision Type: Allow If

Admin overrides: ☒

Protection policy: -- None --

* Name: task table 2 [u_task_table_2]

Description:

Applies To: No. of records matching the condition: 0

Add Filter Condition Add OR Clause

-- choose field -- -- oper -- -- value --

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

1. Allow Access: Allows access to a resource if all conditions are met. Additional ACLs may grant access to records where this ACL has not granted access.

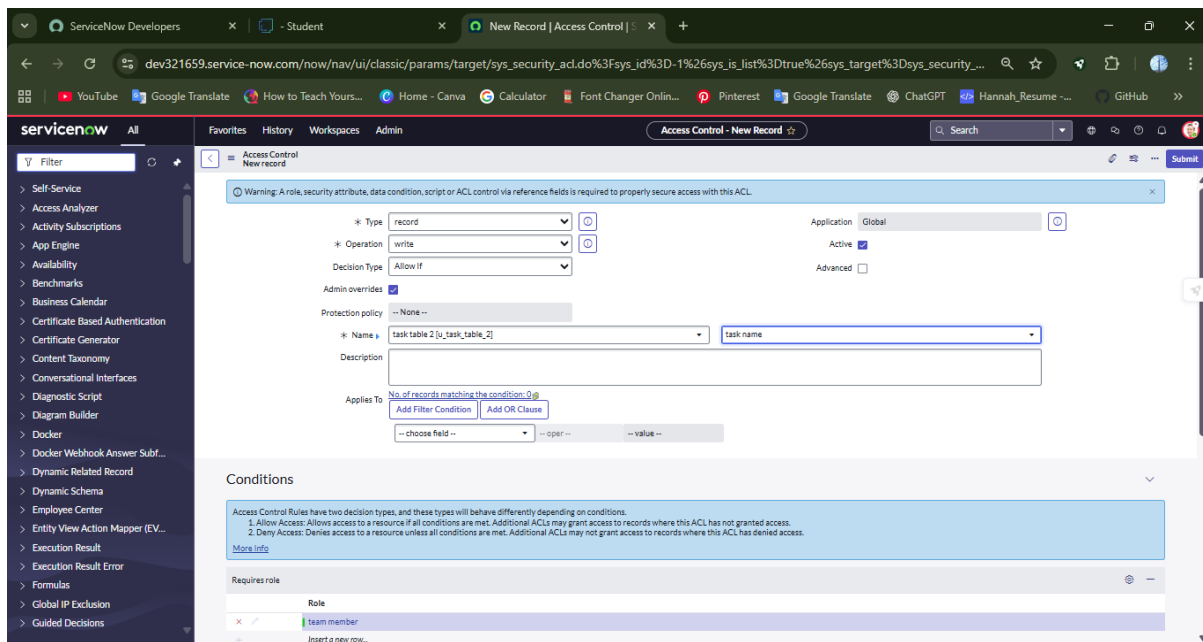
2. Deny Access: Denies access to a resource unless all conditions are met. Additional ACLs may not grant access to records where this ACL has denied access.

More Info

Requires role

Role
team member

Insert a new row...



Milestone 9 : Flow

Activity 1: Create a Flow to Assign operations ticket to group

1. Click “All”
2. Search for Flow Designer under Process Automation.
3. After opening Flow Designer, click “New” and select “Flow”
4. Under flow properties, give flow name as “task table”
5. Application should be Global
6. Click “Build Flow”

ServiceNow Developers | Student | ServiceNow | Homepage - Flows | Workflow

dev321659.service-now.com/now/workflow-studio/home/flow

New version available: Upgrade to get the latest Workflow Studio features. [Learn more](#)

Playbooks | **Flows** | Subflows | Triggers | Actions | Decision tables

Flows 44
Last refreshed just now.

Name	Application	Status	Active	Updated	Updated by
Benchmark Recommendation Evaluator	Benchmarks Spoke	Published	true	2025-07-27 16:45:49	system
Business process approval flow	Global	Published	true	2020-09-27 22:06:13	admin
Change - Cloud Infrastructure - Authorize	Global	Published	true	2020-11-11 07:08:05	admin
Change - Emergency - Authorize	Global	Published	true	2020-10-06 05:39:49	admin
Change - Emergency - Implement	Global	Published	true	2020-09-23 05:06:26	admin
Change - Emergency - Review	Global	Published	true	2020-10-27 04:18:08	admin
Change - Normal - Assess	Global	Published	true	2020-10-06 05:37:05	admin
Change - Normal - Authorize	Global	Published	true	2020-10-06 05:38:35	admin
Change - Normal - Implement	Global	Published	true	2020-09-23 04:23:59	admin
Change - Standard	Global	Published	true	2020-09-23 05:09:01	admin
Change - Standard - Implement	Global	Published	true	2020-09-23 11:13:41	admin
Change - Standard - Proposal	Global	Published	true	2025-07-27 16:35:12	system
Change - Unauthorized - Authorize	Global	Published	true	2020-10-21 04:20:01	admin
Change - Unauthorized - Review	Global	Published	true	2025-07-27 16:37:17	system
Default SLA flow	Global	Published	true	2020-04-23 05:42:24	admin

Pick up where you left off

- task table
Last updated: 4 d. ago by System Administrator...
- Upgrade management guided ...
Last updated: a year ago by System Administrator...
- Steps
Last updated: a year ago by System Administrator...

Latest updates

- System Administrator modified task table
4 d. ago
- System Administrator modified Upgrade management guided setup
a year ago
- System Administrator modified Steps
a year ago
- System Administrator modified Steps
a year ago
- System Administrator modified Demo Post Auth policy
a year ago

Resources

- Product Documentation
- ServiceNow Videos
- Community

ServiceNow Developers | Student | ServiceNow | Homepage - Flows | Workflow

dev321659.service-now.com/now/workflow-studio/home/flow

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Playbooks | **Flows** | Subflows | Triggers | Actions | Decision tables

Flows 44
Last refreshed 1m ago.

Name	Application	Status	Active	Updated	Updated by
Benchmark Recommendation Evaluator	Benchmarks Spoke	Published	true	2025-07-27 16:45:49	system
Business process approval flow	Global	Published	true	2020-09-27 22:06:13	admin
Change - Cloud Infrastructure - Authorize	Global	Published	true	2020-11-11 07:08:05	admin
Change - Emergency - Authorize	Global	Published	true	2020-10-06 05:39:49	admin
Change - Emergency - Implement	Global	Published	true	2020-09-23 05:06:26	admin
Change - Emergency - Review	Global	Published	true	2020-10-27 04:18:08	admin
Change - Normal - Assess	Global	Published	true	2020-10-06 05:37:05	admin
Change - Normal - Authorize	Global	Published	true	2020-10-06 05:38:35	admin
Change - Normal - Implement	Global	Published	true	2020-09-23 04:23:59	admin
Change - Standard	Global	Published	true	2020-09-23 05:09:01	admin
Change - Standard - Implement	Global	Published	true	2020-09-23 11:13:41	admin
Change - Standard - Proposal	Global	Published	true	2025-07-27 16:35:12	system
Change - Unauthorized - Authorize	Global	Published	true	2020-10-21 04:20:01	admin
Change - Unauthorized - Review	Global	Published	true	2025-07-27 16:37:17	system
Default SLA flow	Global	Published	true	2020-04-23 05:42:24	admin

New

- Playbook
- Flow
- Subflow
- Trigger
- Action
- Decision table

Pick up where you left off

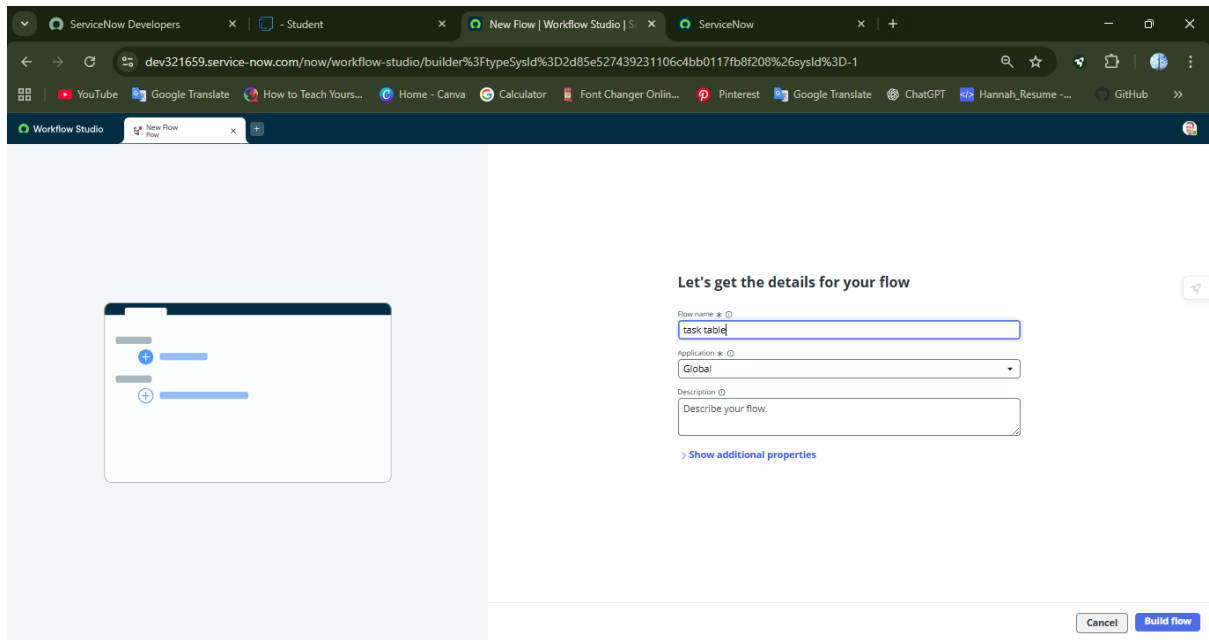
- task table
Last updated: 4 d. ago by System Administrator...
- Upgrade management guided ...
Last updated: a year ago by System Administrator...
- Steps
Last updated: a year ago by System Administrator...

Latest updates

- System Administrator modified task table
4 d. ago
- System Administrator modified Upgrade management guided setup
a year ago
- System Administrator modified Steps
a year ago
- System Administrator modified Steps
a year ago
- System Administrator modified Demo Post Auth policy
a year ago

Resources

- Product Documentation
- ServiceNow Videos
- Community



next step:

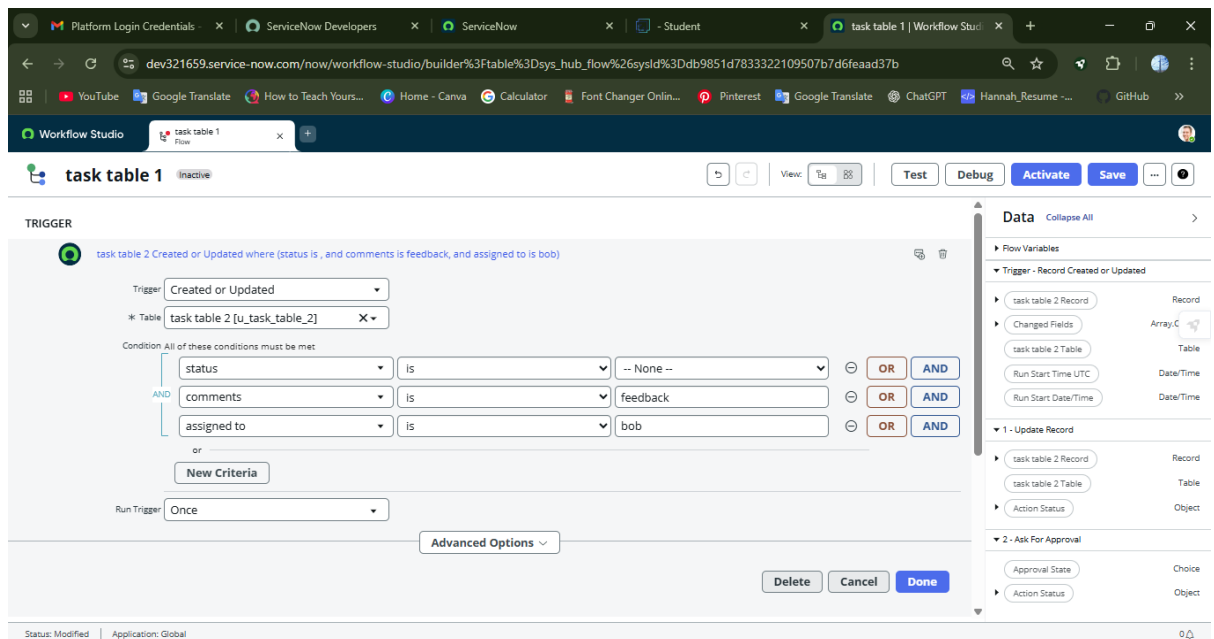
1. Click on Add a trigger
2. Select the trigger in that Search for “create record” and select that.
3. Give the table name as “task table”.
4. Give the Condition as

Field: status
Operator: is
Value: in progress

Field: comments
Operator: is
Value: feedback

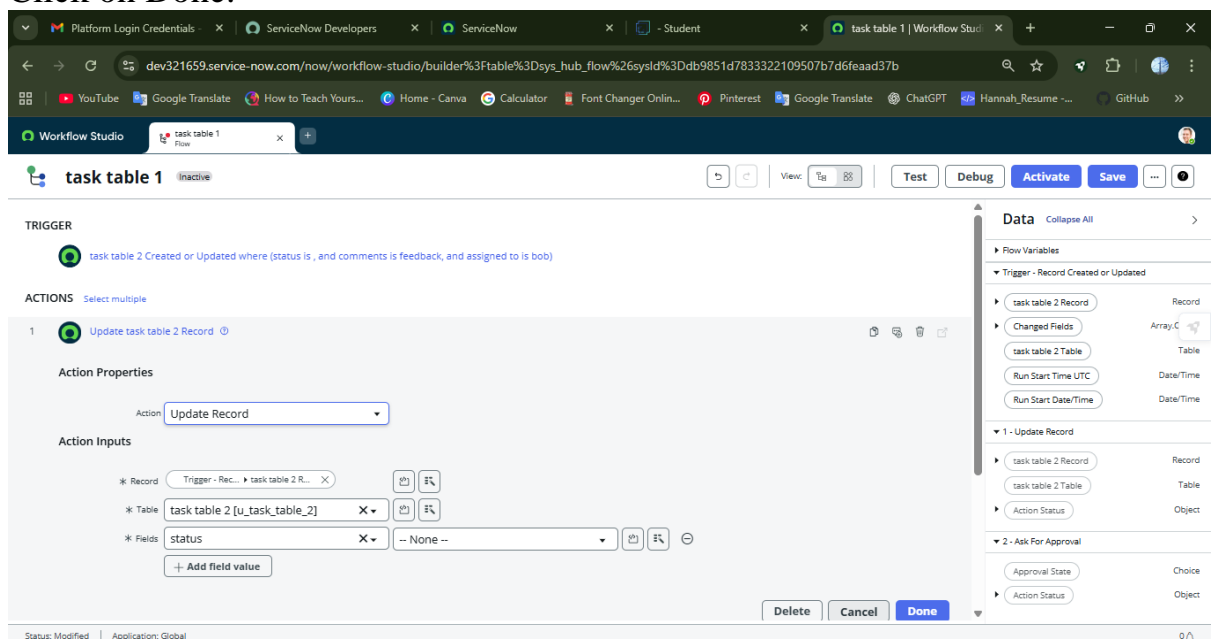
Field: assigned to
Operator: is
Value: bob

5. Click “Done”



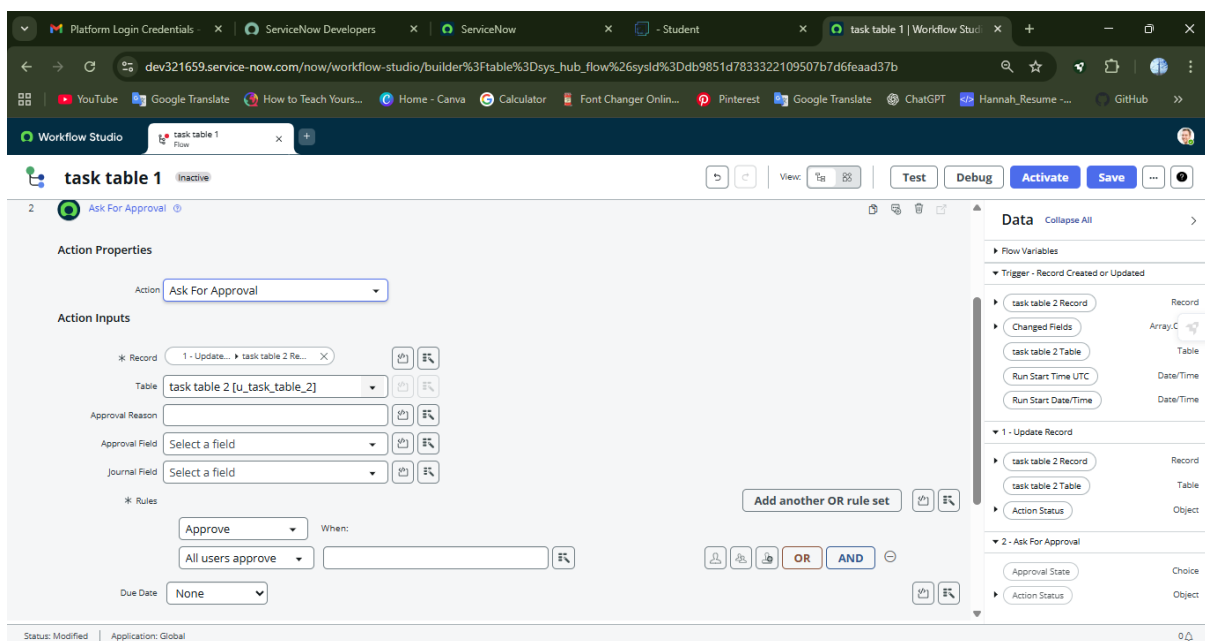
Next step:

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 task table in the “All”
10. In the table of assigned to, write “Bob”
11. Click Submit

The screenshot shows the ServiceNow interface for creating a new record in 'task table 2'. The browser address bar indicates the URL is `dev321659.service-now.com/now/nav/ui/classic/params/target/u_task_table_2.do%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Du_task_ta...`. The left sidebar contains a navigation menu with 'task table' and its sub-items: 'task table task id s', 'task table 2', 'task table 2 s', 'task table due date', 'task table due date s', 'task table task name', and 'task table task name s'. The main form area has the following fields:

- due date**: A date input field.
- status**: A dropdown menu currently set to 'None'.
- task id**: A text input field.
- assigned to**: A dropdown menu currently set to 'bob'.
- task name**: A text input field.
- comments**: A text input field.

A 'Submit' button is located at the bottom left of the form area.

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.