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

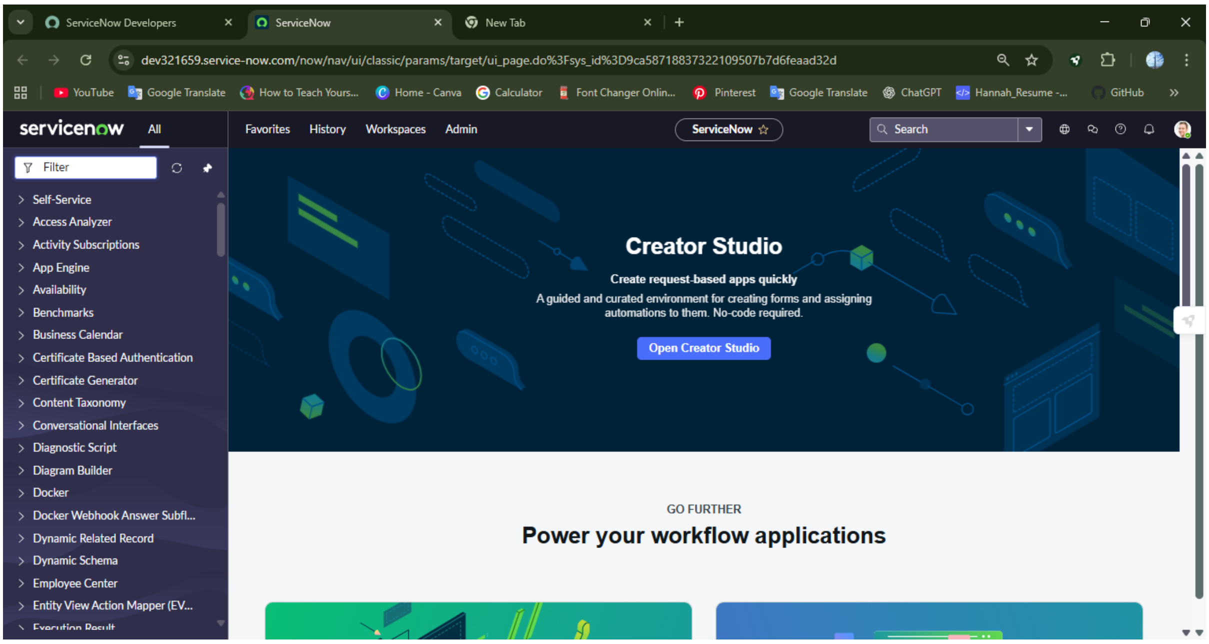
PROBLEM STATEMENT:

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.

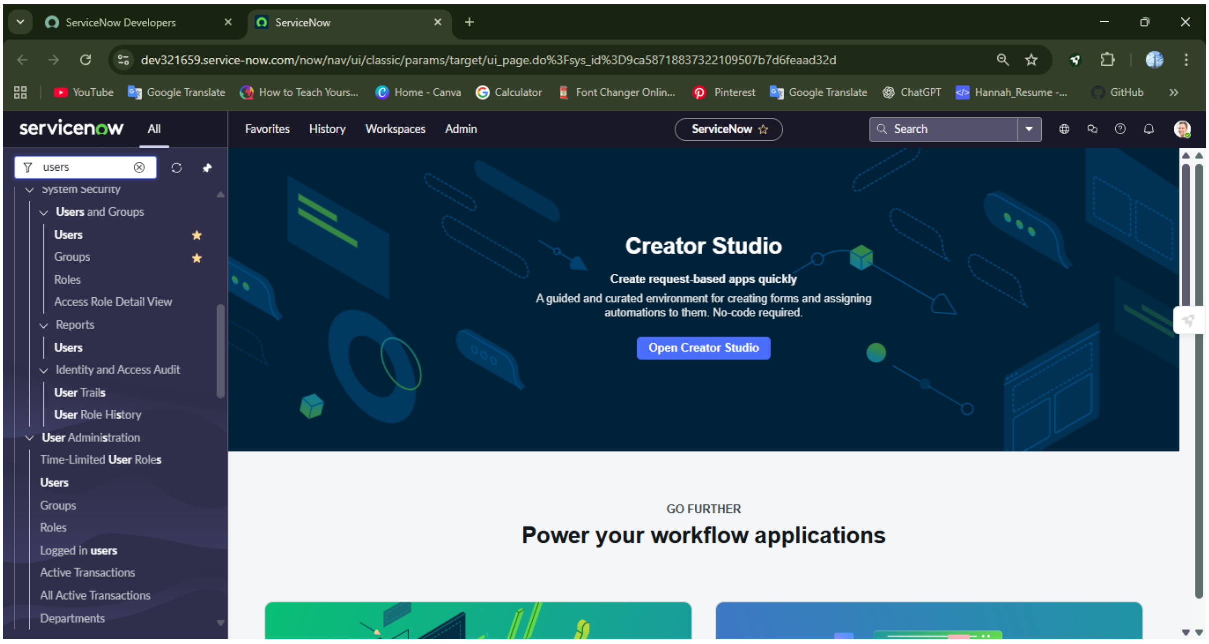
TASK INITIATION

Milestone 1 : User

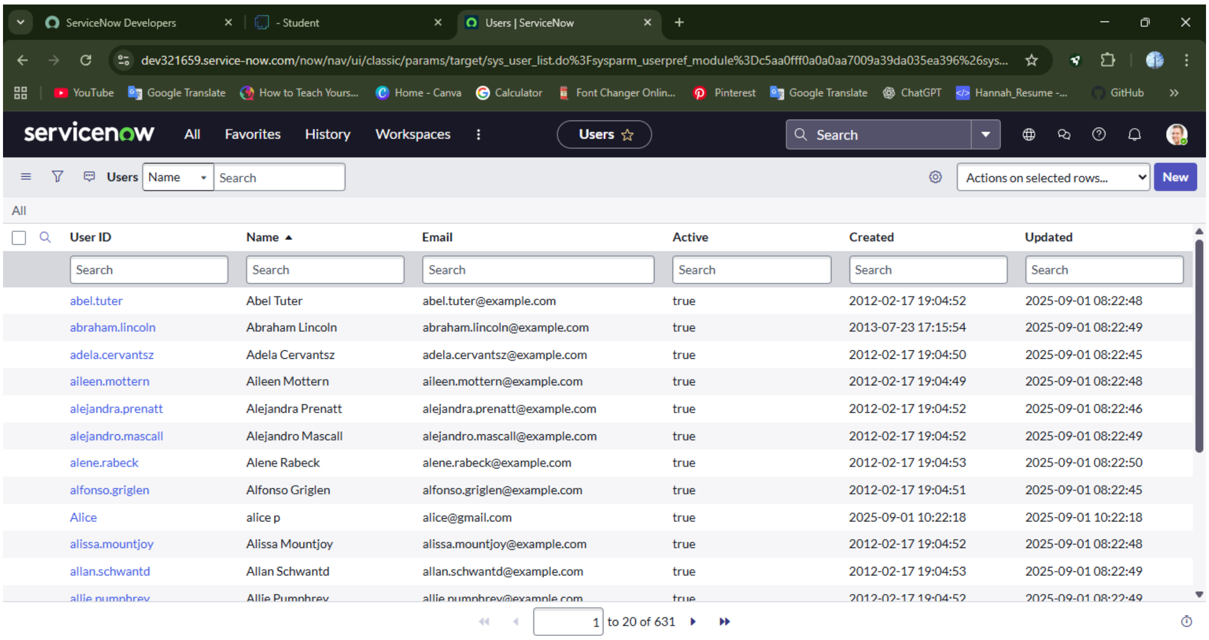
1. Open the chrome and entering into “developers.servicenow.com”
2. Then use the required email and password to take the project to the next level.
3. You will see a page like this in below.



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.

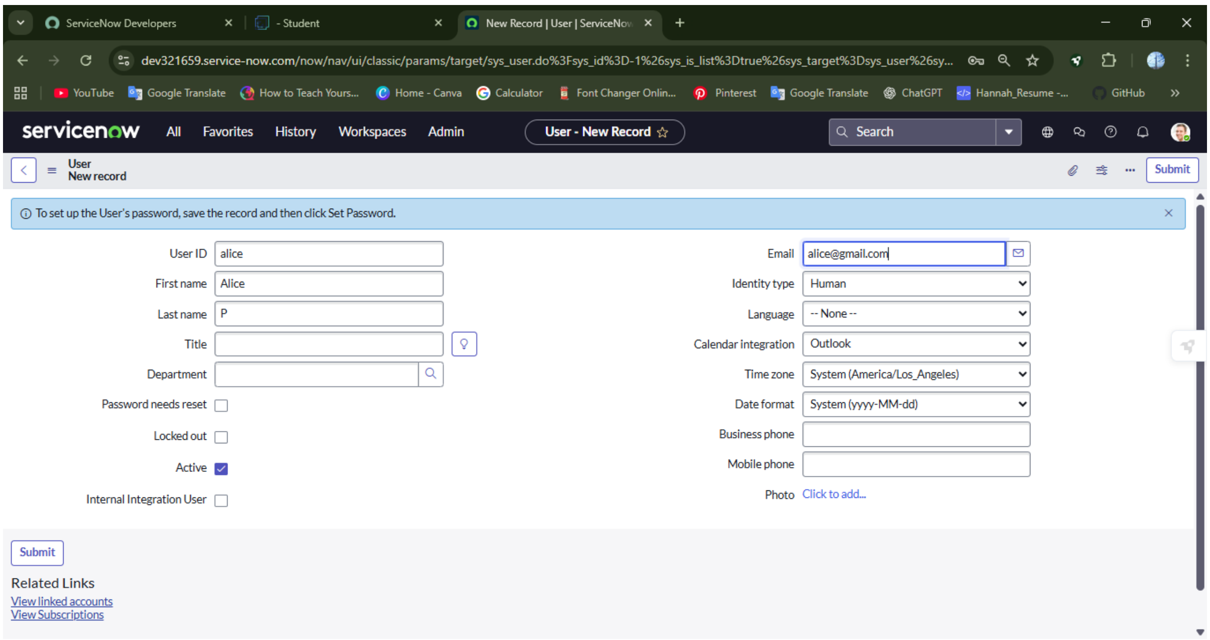


Activity 1 : Create Users

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

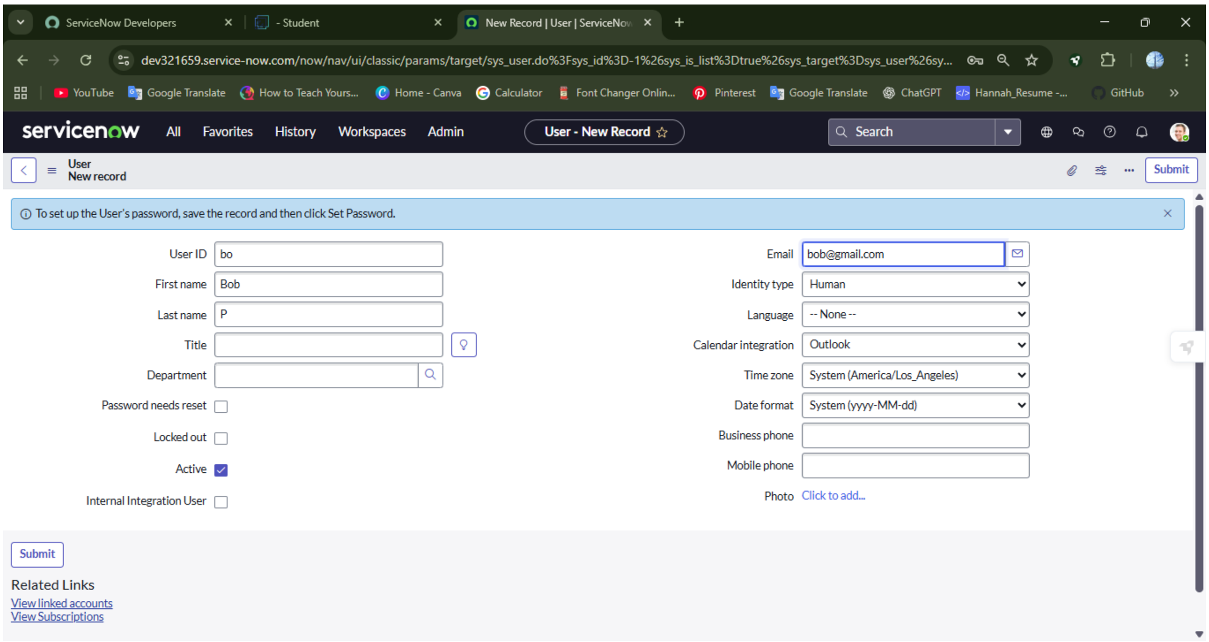
8. Click "Submit" after filling the details of Alice.
9. The user Alice P will be created.



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

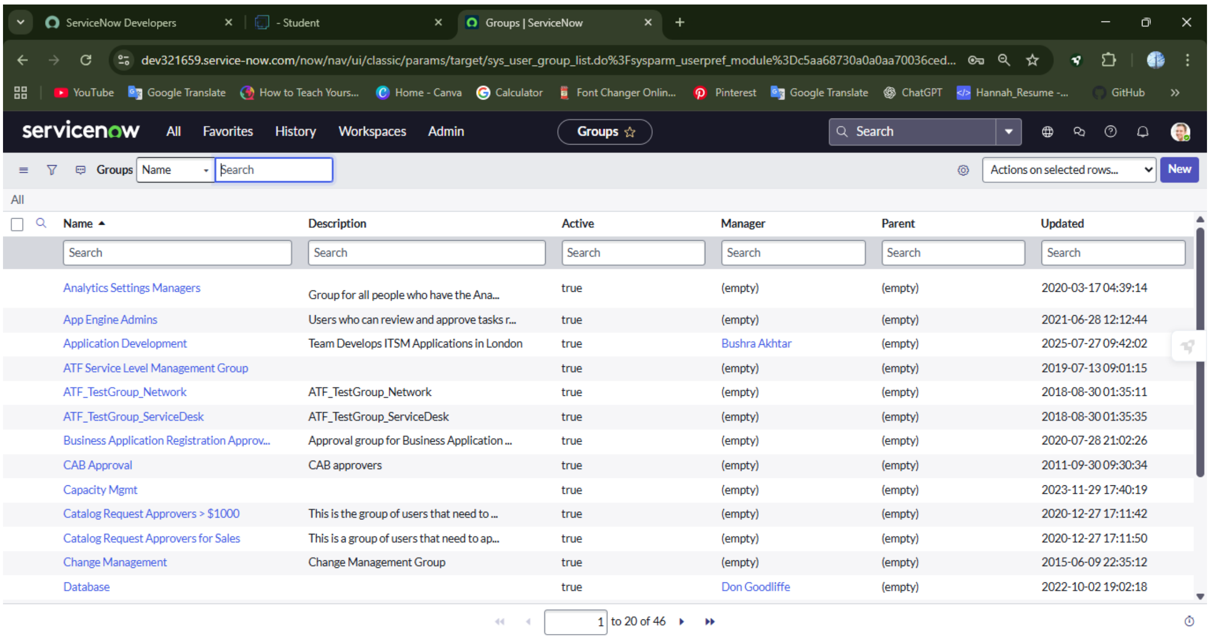


11. Same as the last step, click the submit button after filling the required details of the users.

Milestone 2 : Groups

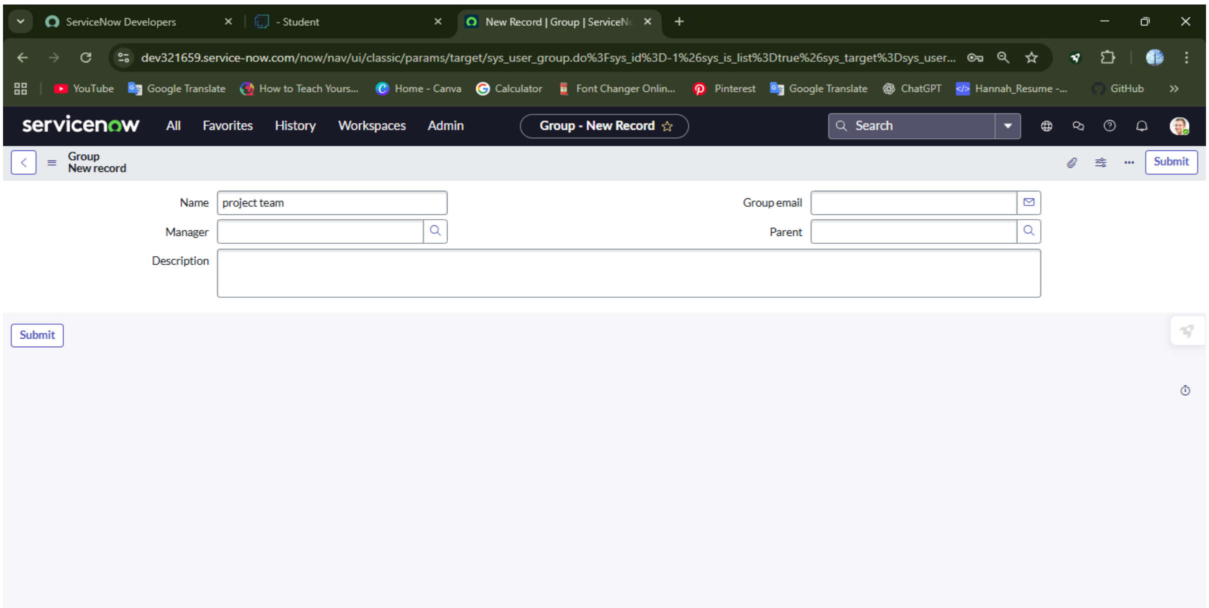
Activity 1 : Create Group

1. Click on "**All**".
2. Search for Groups under "System Security".



3. Click “**New**”
4. Filling up the details of the user will be the next step

   Name : Project team

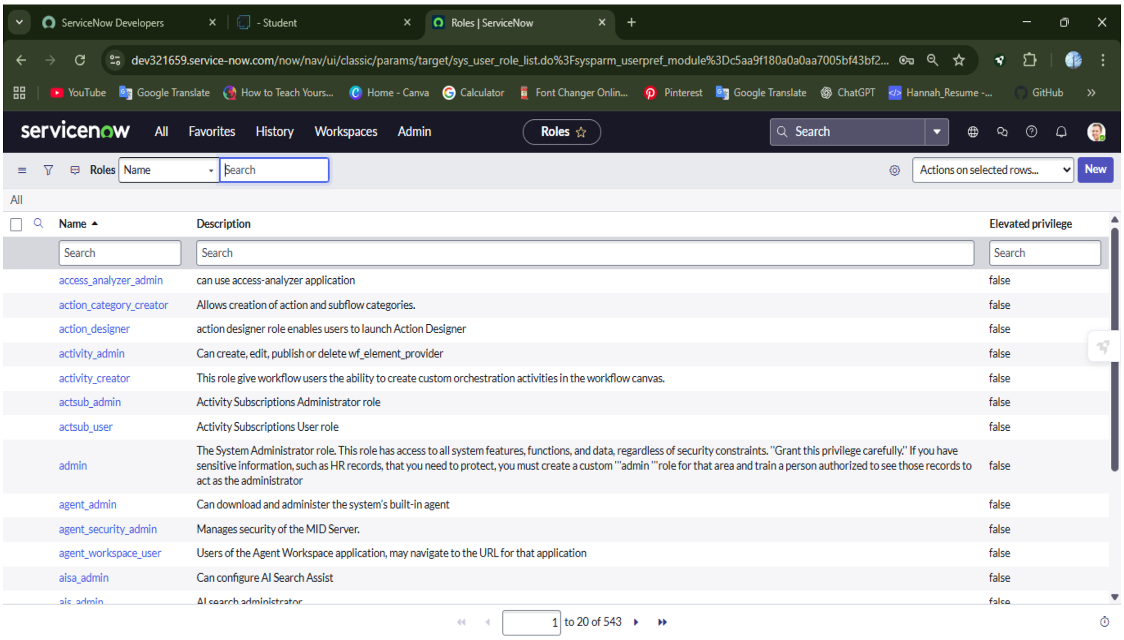


5. Click on Submit.

Milestone 3 : Roles

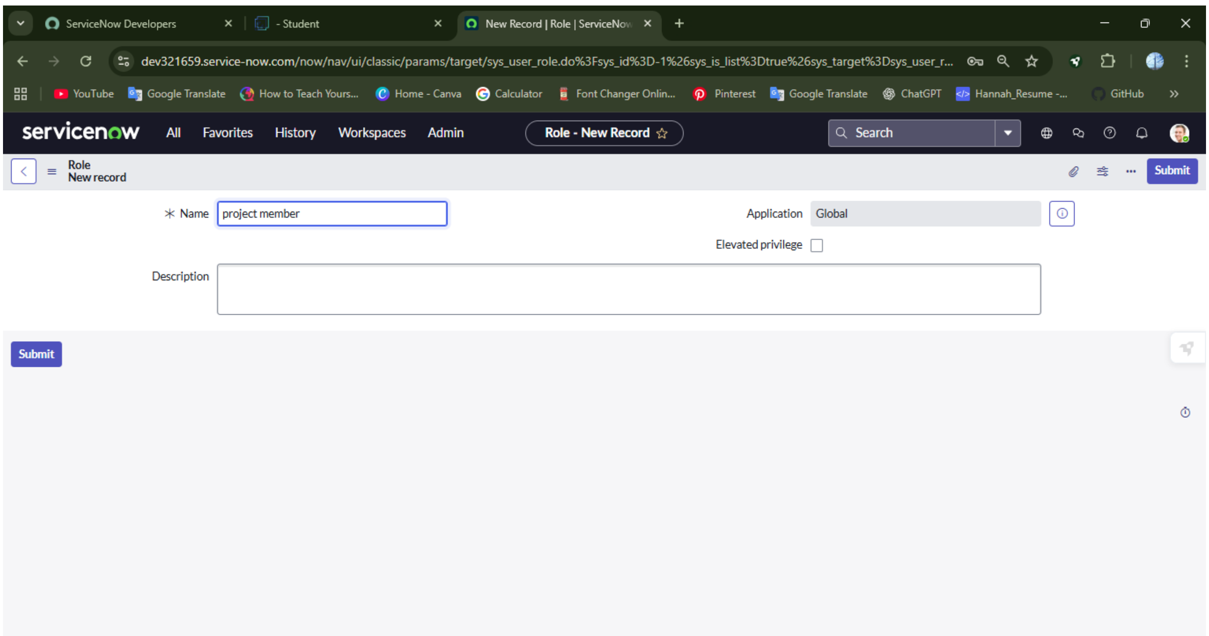
Activity 1 : Create Roles

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.

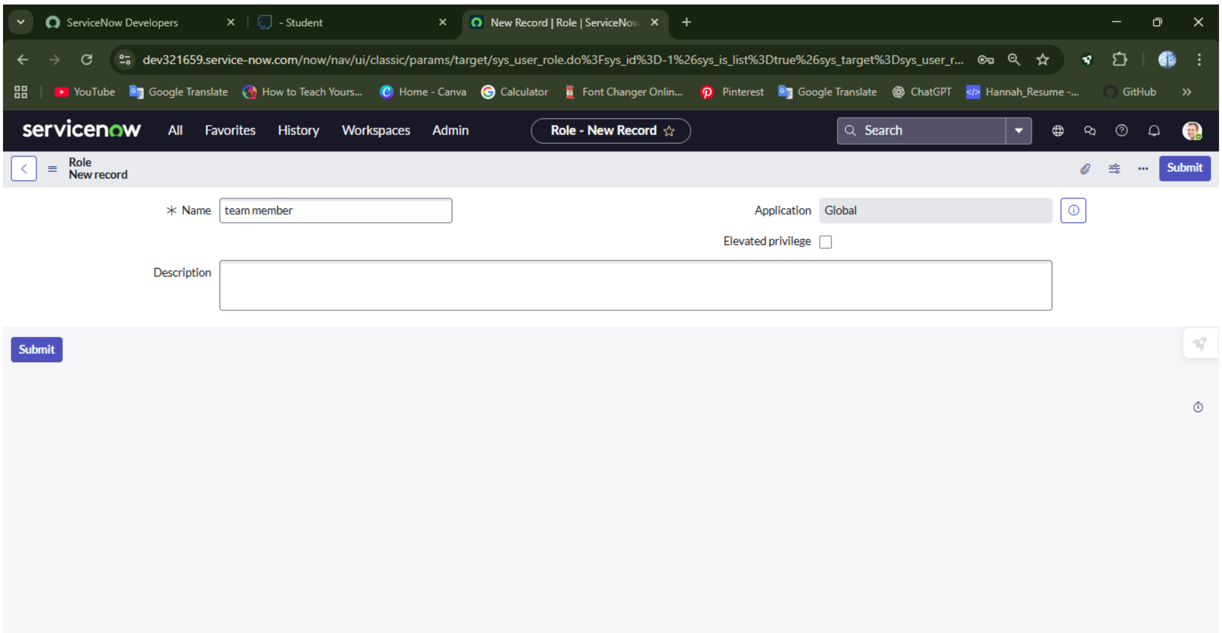
Name: Project member



Create one more role:

5. Create another role with the following details.

   Name : Team Member



6. Click on Submit.

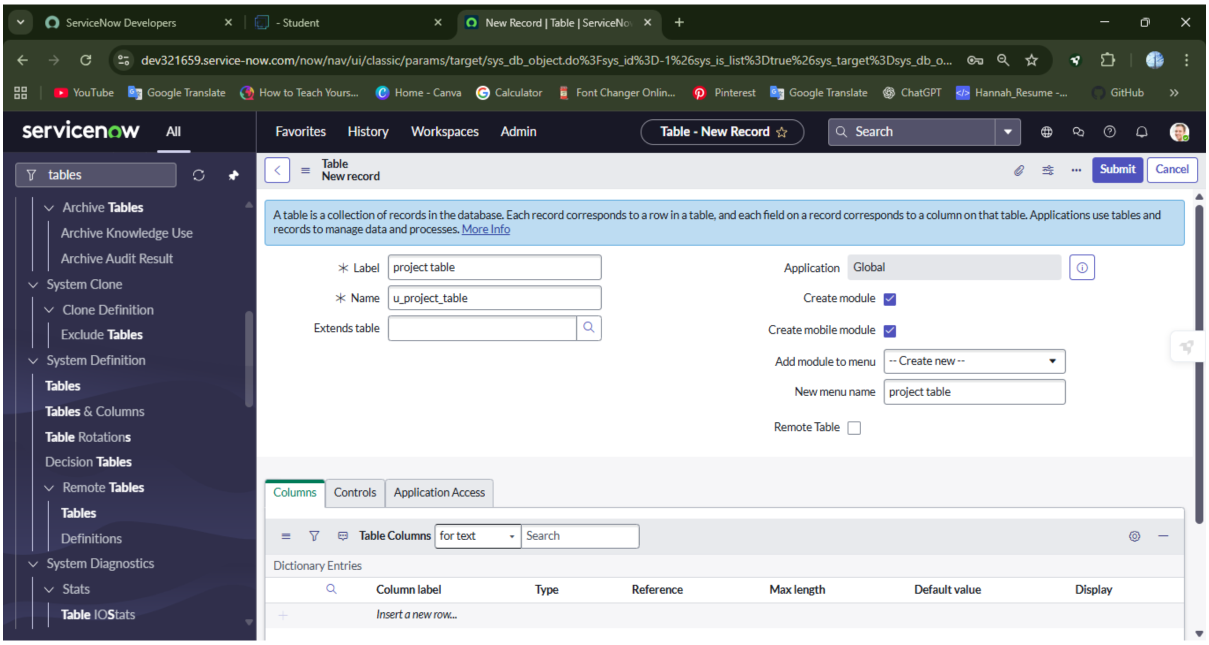
Milestone 4 : Table

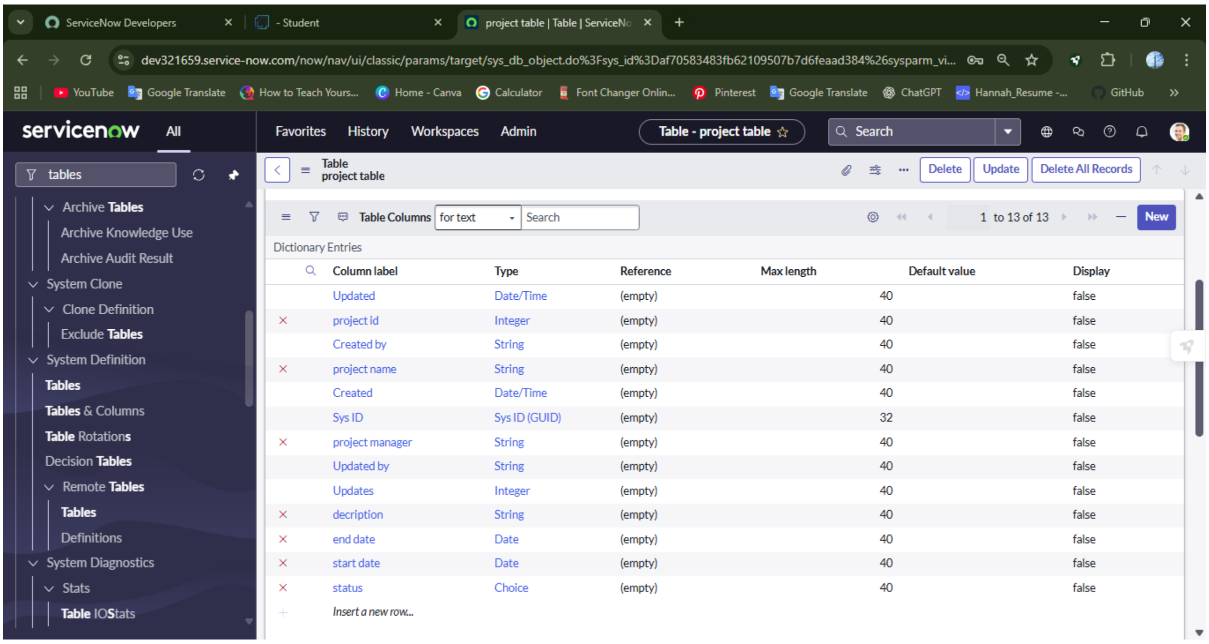
Activity 1: Create table

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





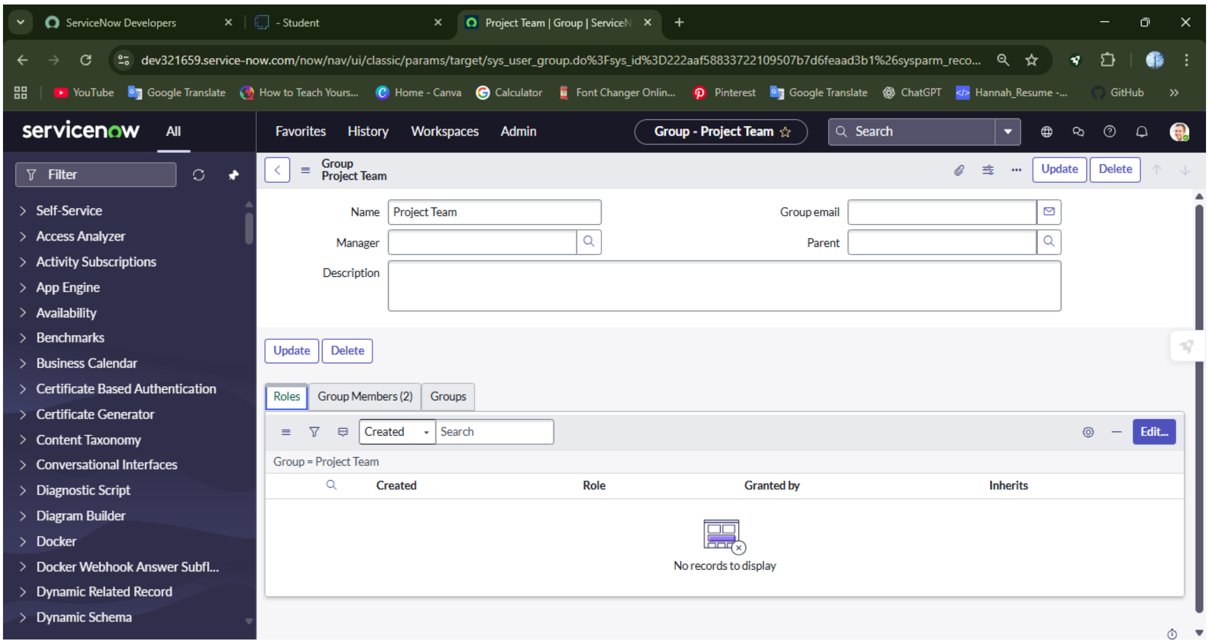
Create another table

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

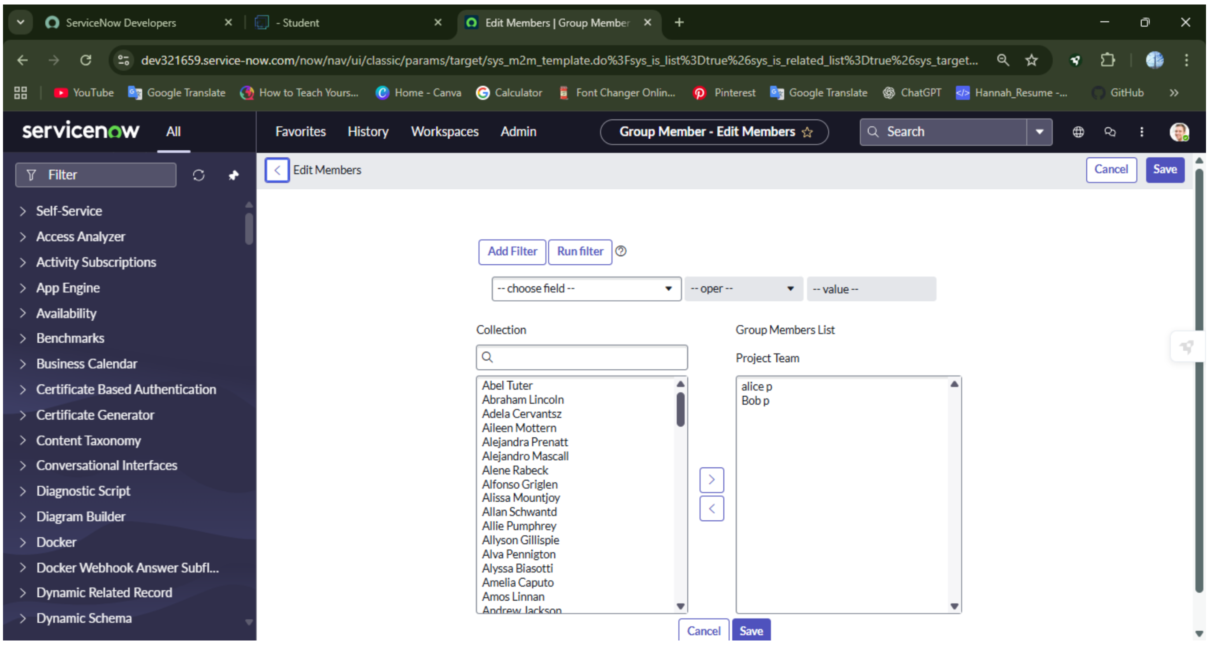
Milestone 5 : Assigned users to groups

Activity 1 : Assign users to project team group.

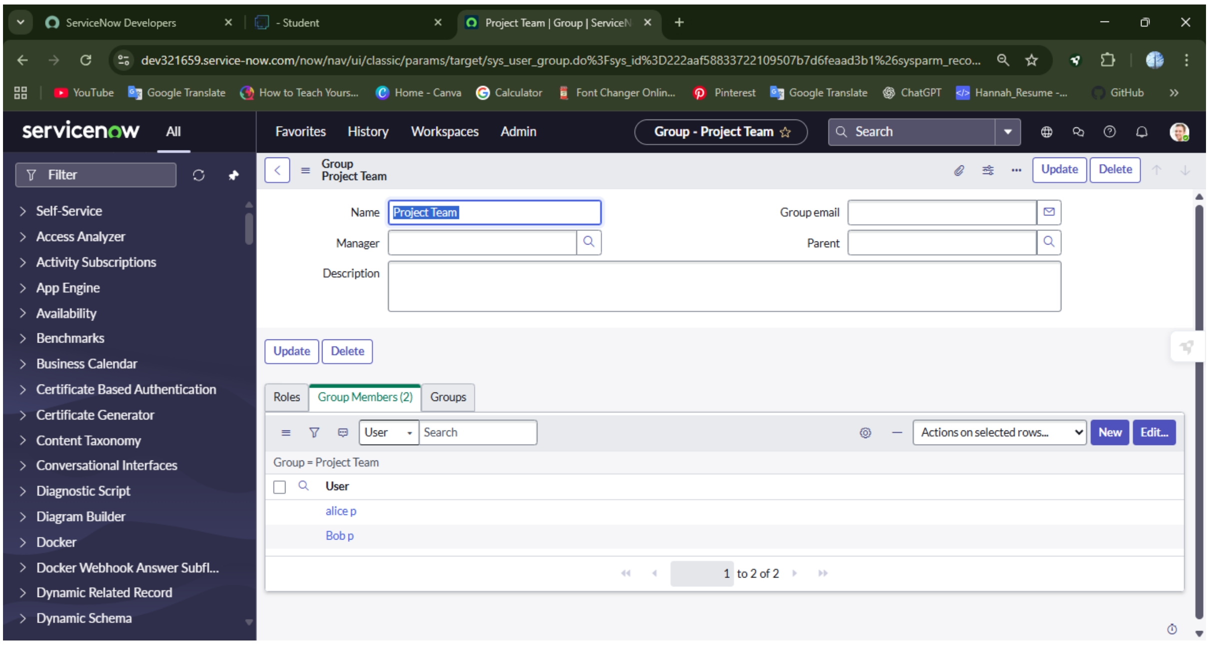
1. Click **“All”.**
2. Search for groups under System definition
3. Select the **“Project team”** group



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



6. Click save .

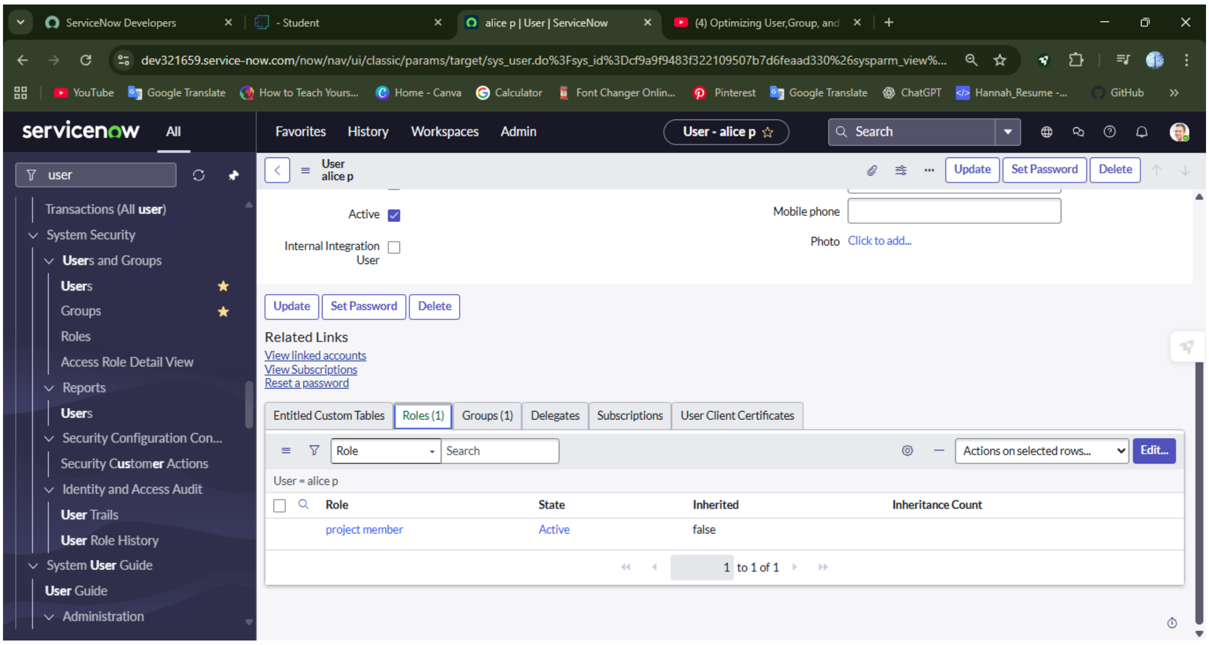


Milestone 6 :

Activity 1: Assign Roles to Alice user.

1. Click all

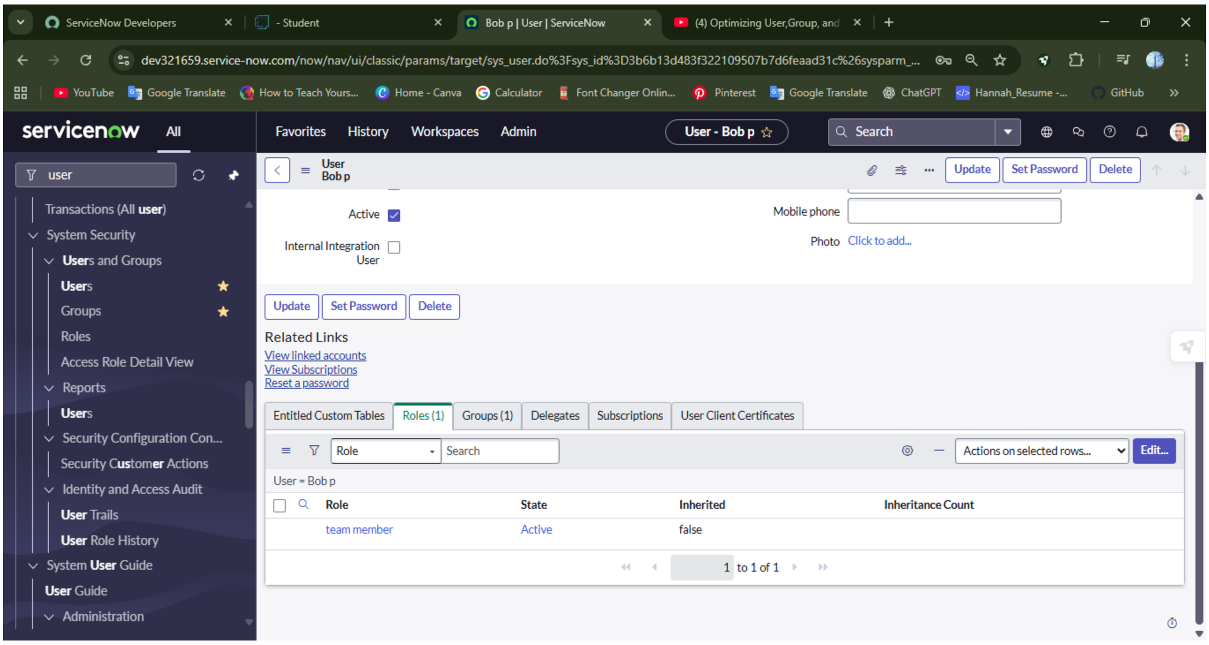
2. Select users under System definition
3. Select Alice P >> Roles
4. Select edit and give **“Project member”**



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”

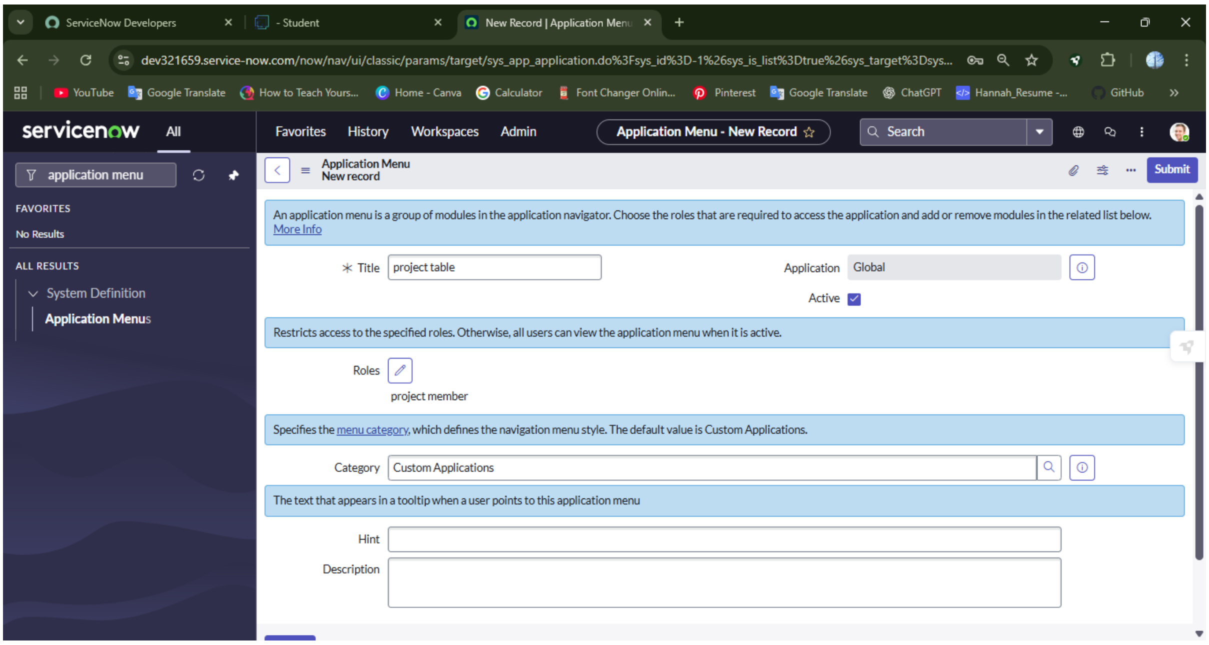


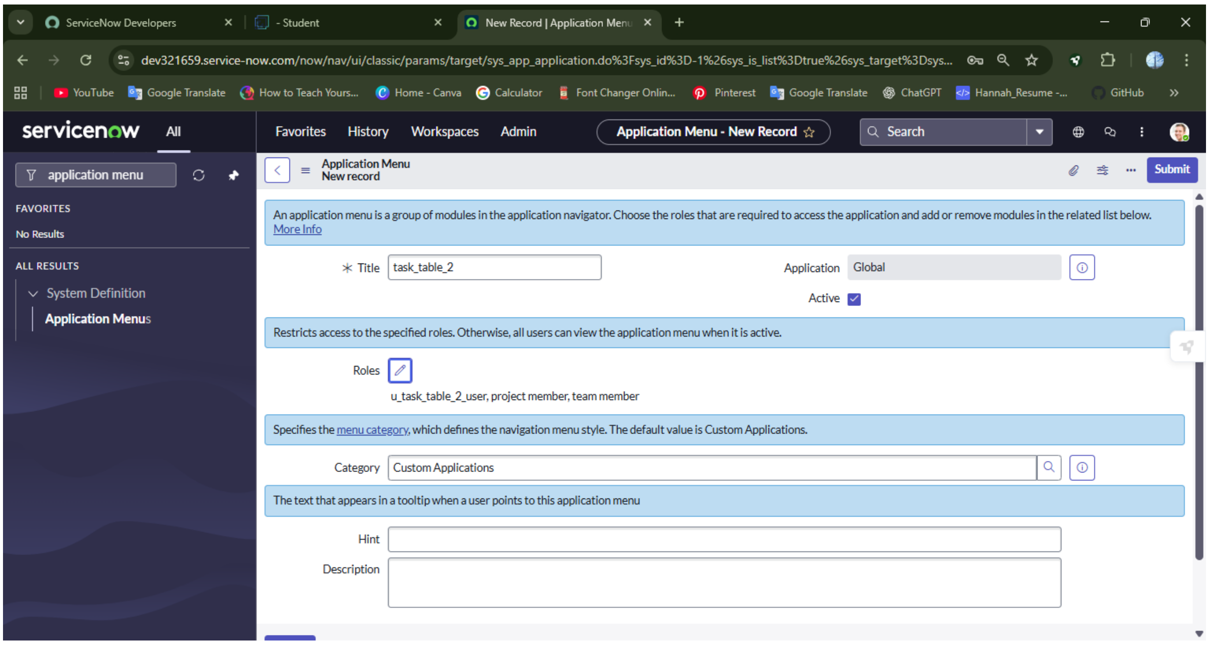
4. Click **“Update”** in the top.

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

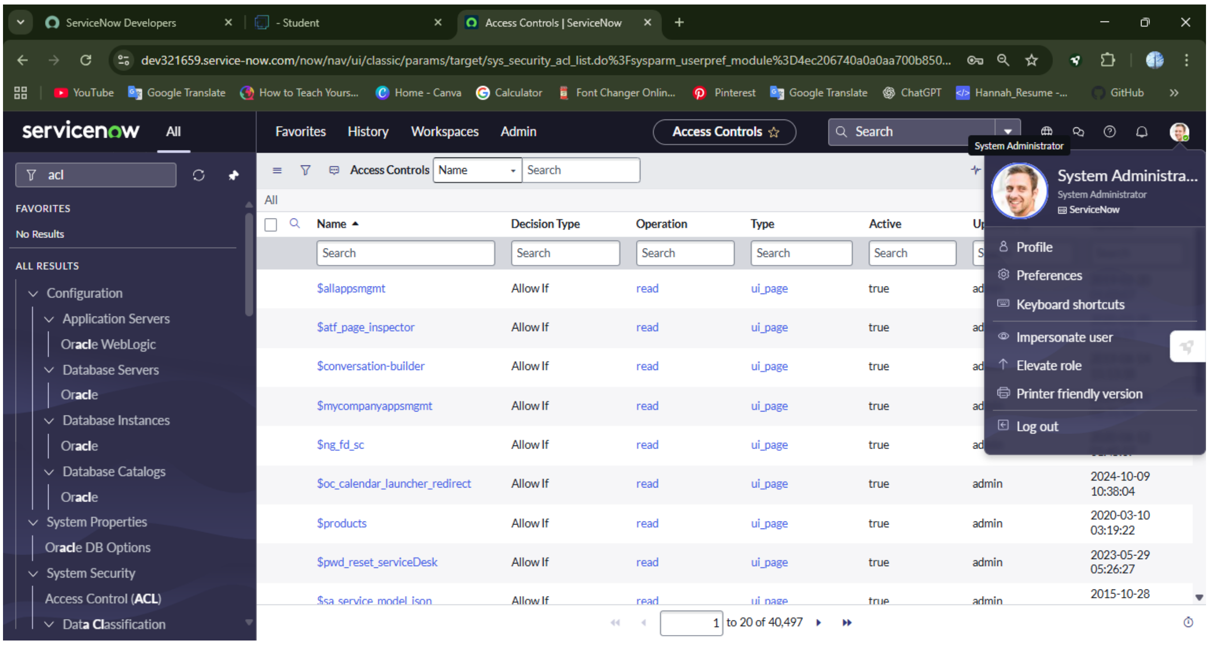


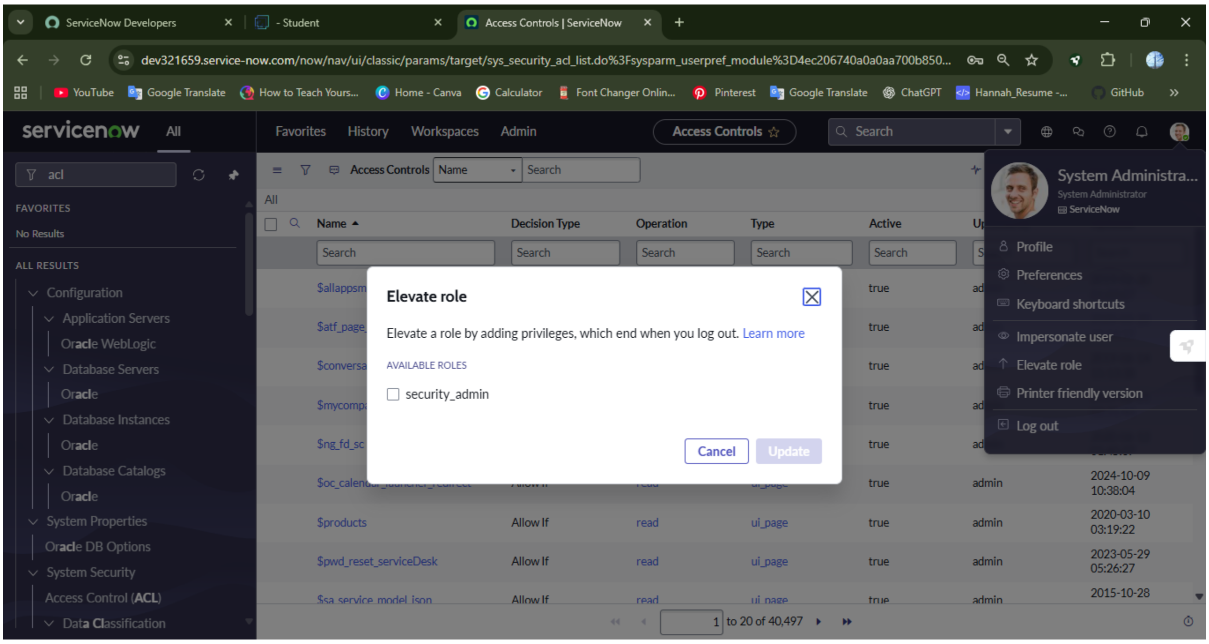


Milestone 8 : Access control list

Activity 1: Create ACL

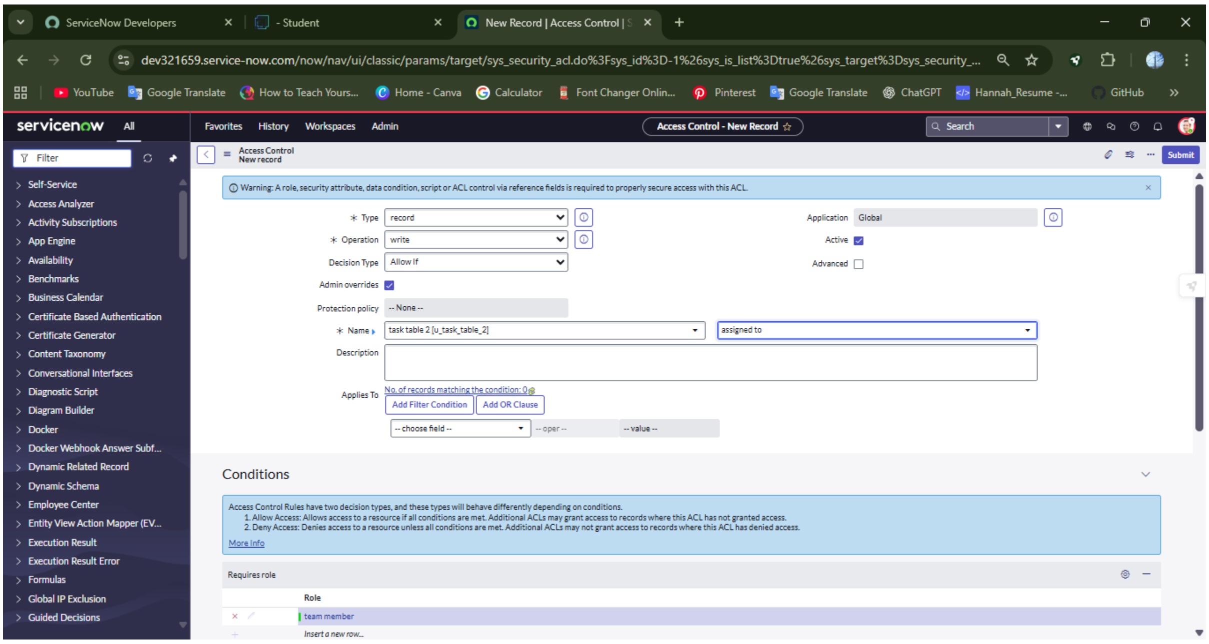
1. Click all
2. Search for ACL under System Security
3. Click **“Elevate Role”**

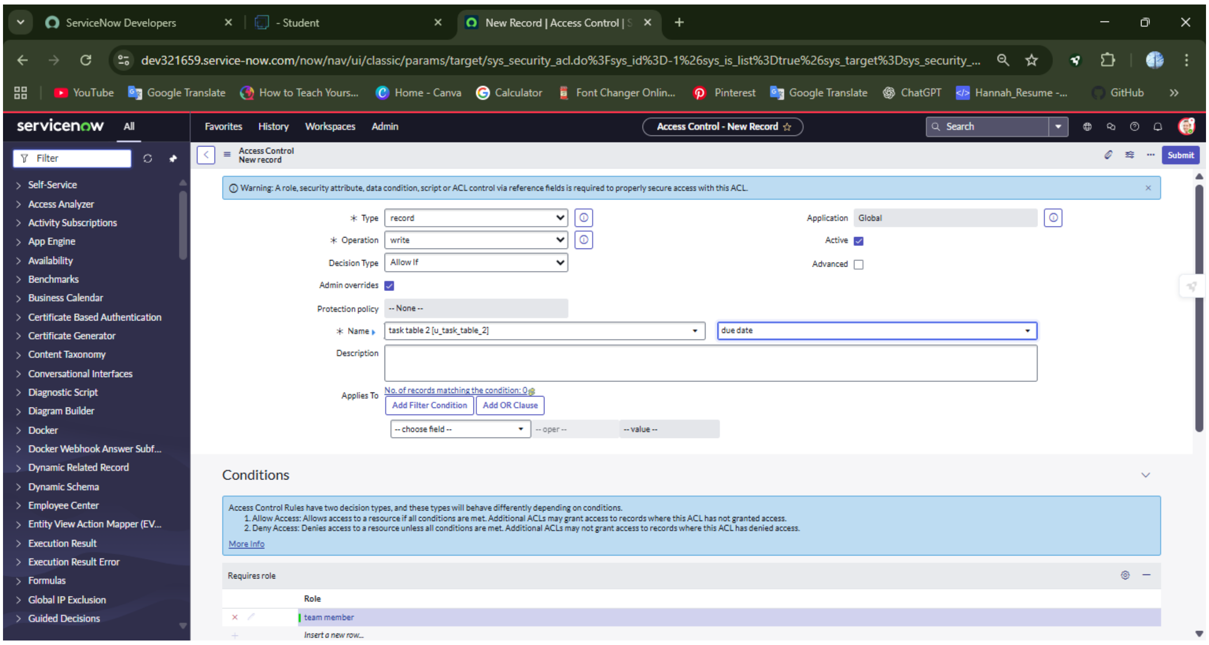


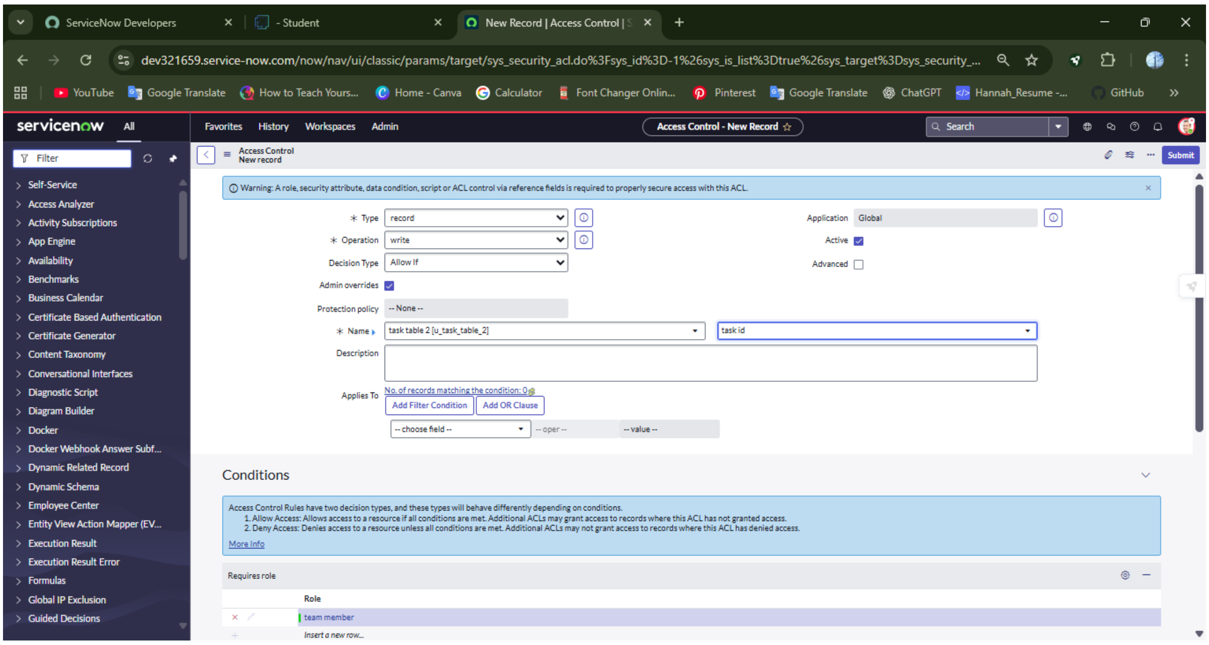


4. Fill the following details to create a new ACL
5. Scroll down under requires role
6. Double click on insert a new row
7. Give task table and team member role

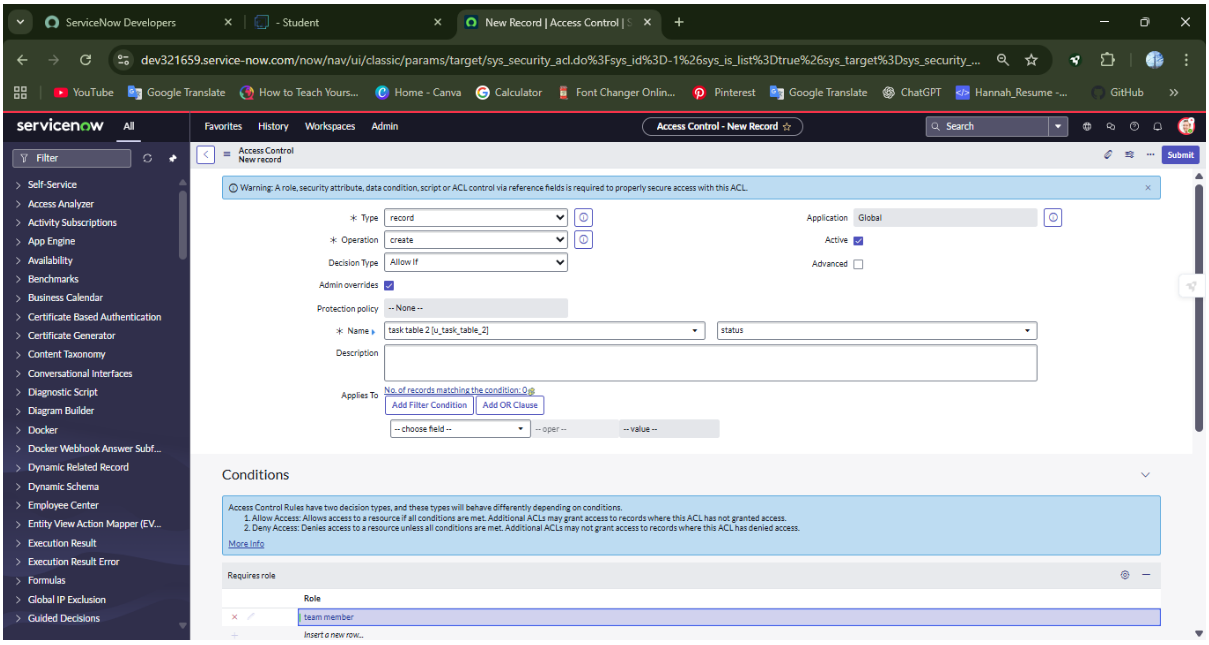
8. Click on submit
9. Similarly create 4 ACL for the following fields



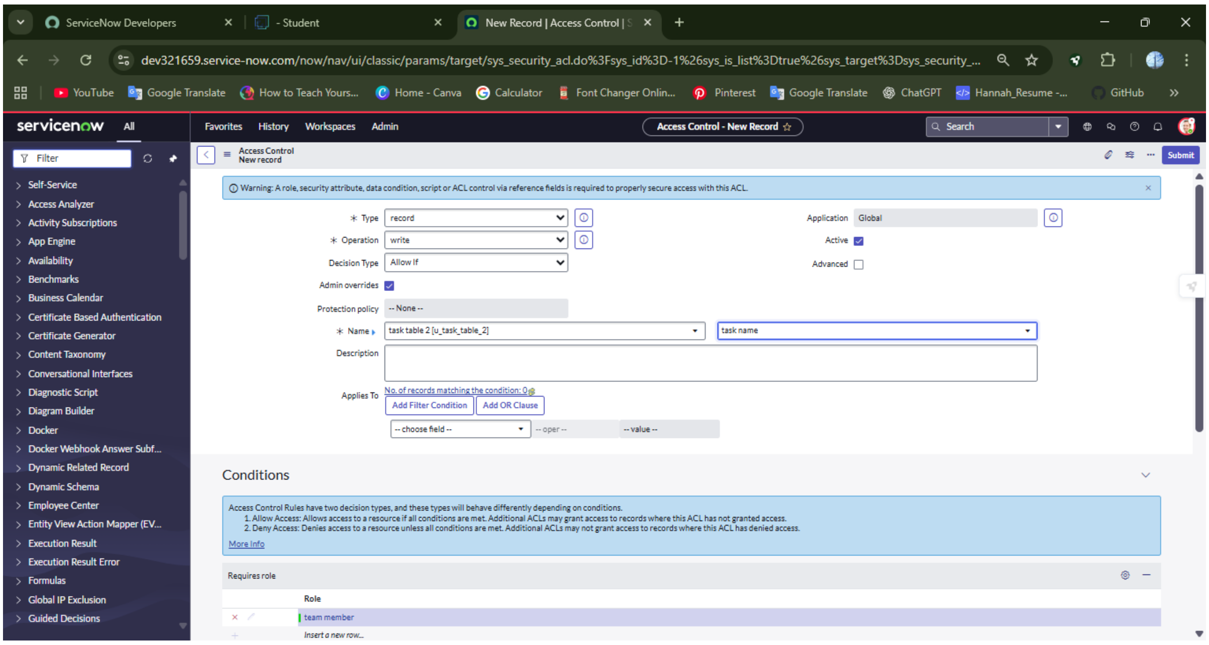




Access Control - New Record
Warning: A role, security attribute, data condition, script or ACL control via reference fields is required to properly secure access with this ACL.
Type record
Operation write
Decision Type Allow If
Name task table 2 [u_task_table_2] task id
Conditions
Requires role
team member



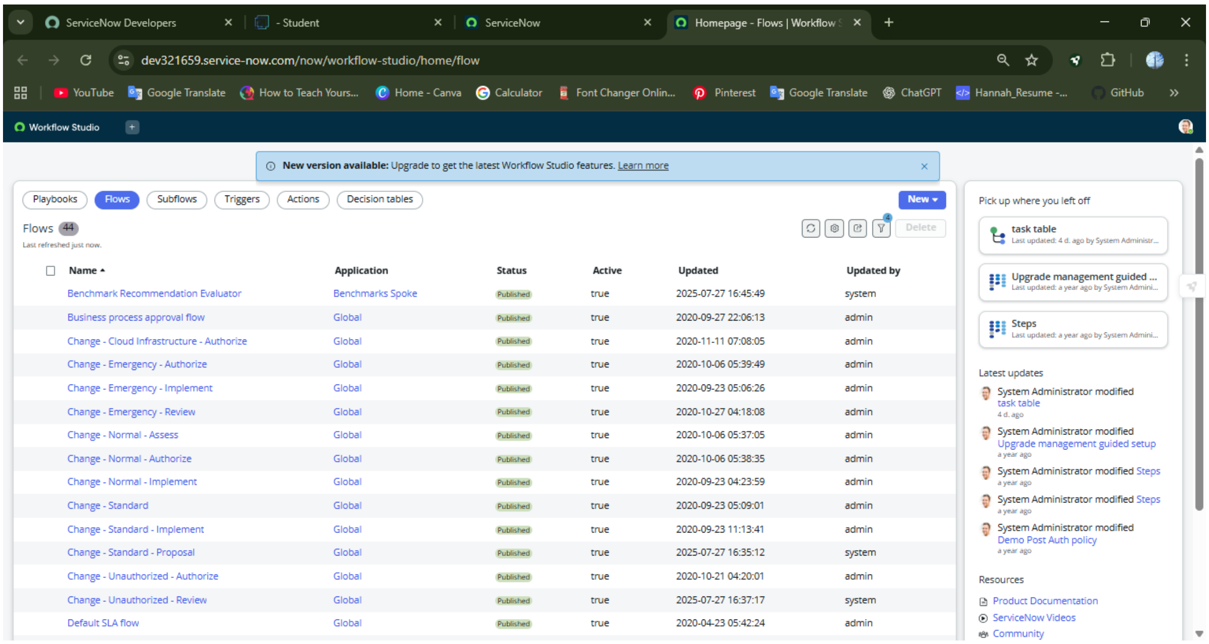
Access Control - New Record
Warning: A role, security attribute, data condition, script or ACL control via reference fields is required to properly secure access with this ACL.
Type record
Operation create
Decision Type Allow If
Name task table 2 [u_task_table_2] status
Conditions
Requires role
team member



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”**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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 Administr...
Upgrade management guided ...
Last updated: a year ago by System Admini...
Steps
Last updated: a year ago by System Admini...
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
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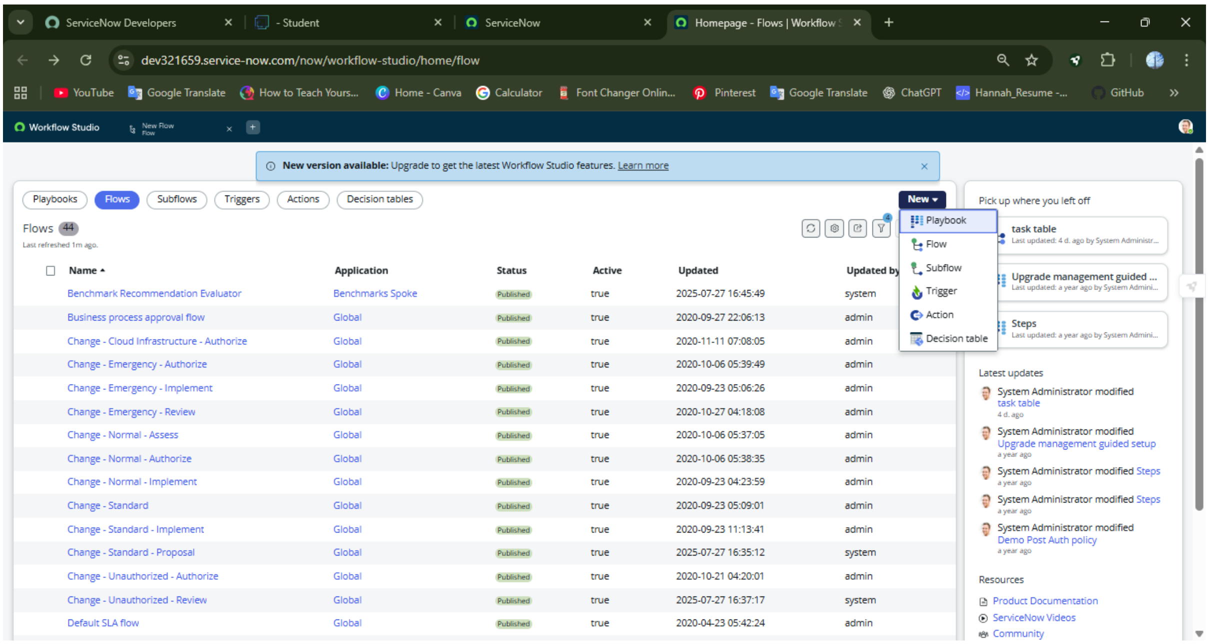
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Last refreshed 1m ago.
Name
Application
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Active
Updated
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Benchmark Recommendation Evaluator Benchmarks Spoke Published true 2025-07-27 16:45:49 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
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Pick up where you left off
task table
Last updated: 4 d. ago by System Administr...
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Last updated: a year ago by System Admini...
Steps
Last updated: a year ago by System Admini...
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
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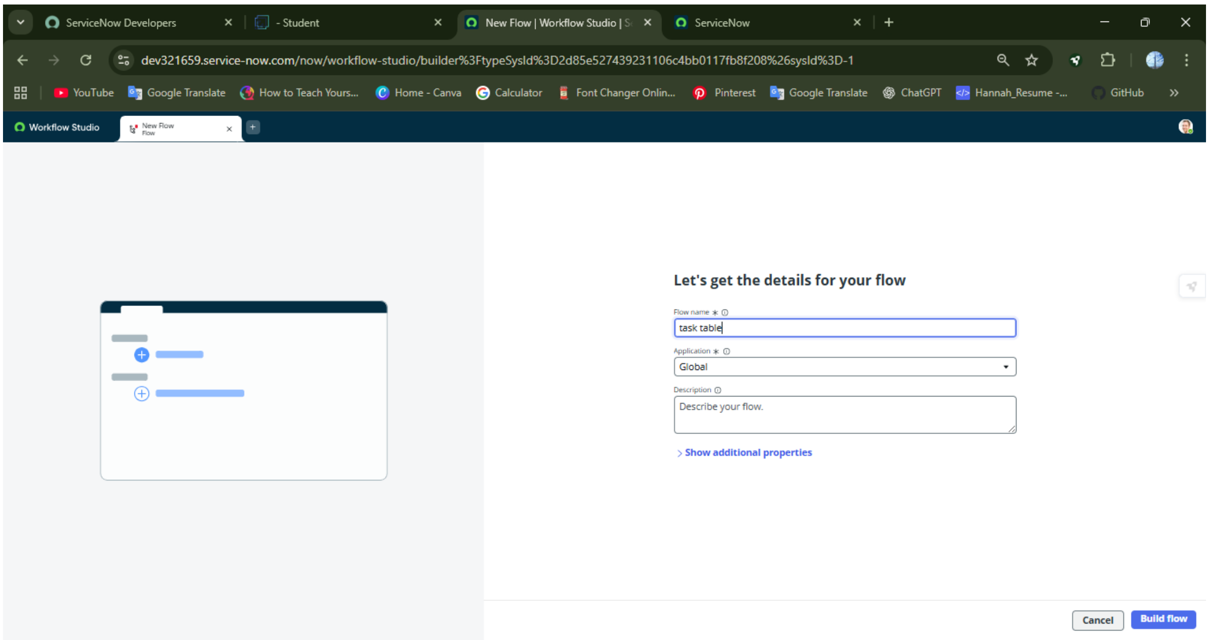


next step:

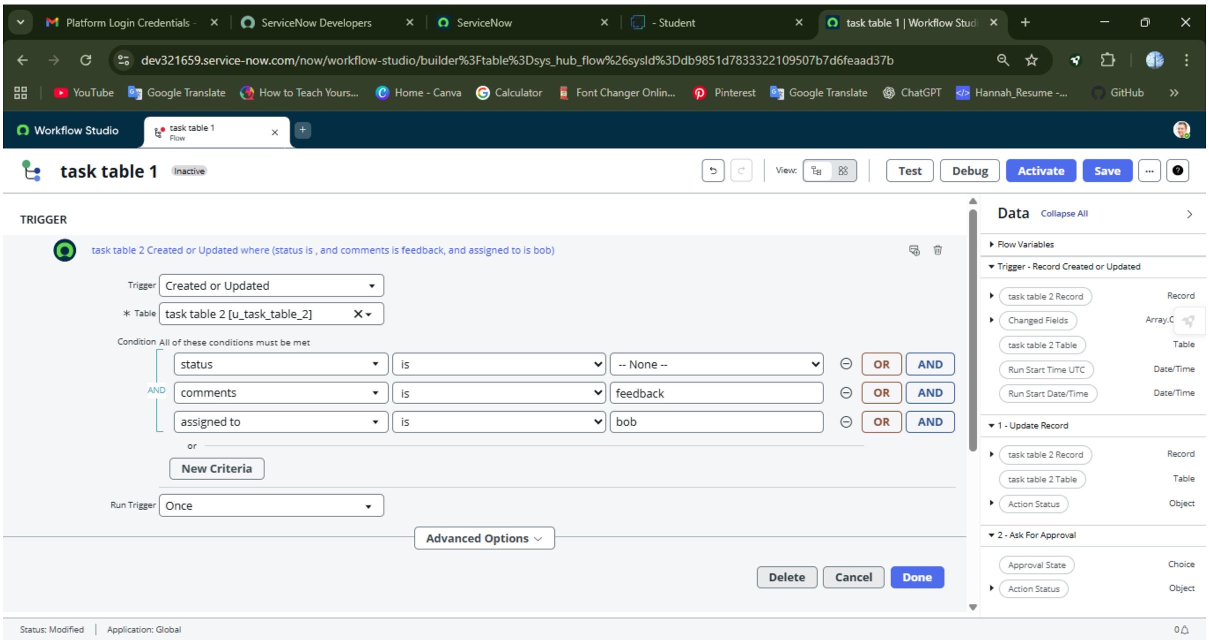
1. Click on Add a trigger
2. Select the trigger in that Search for “create record” and select that.
3. Give the table name as “task table ”.
4. Give the Condition as

   Field: status
   Operator: is
   Value: in progress

   Field: comments
   Operator: is
   Value: feedback

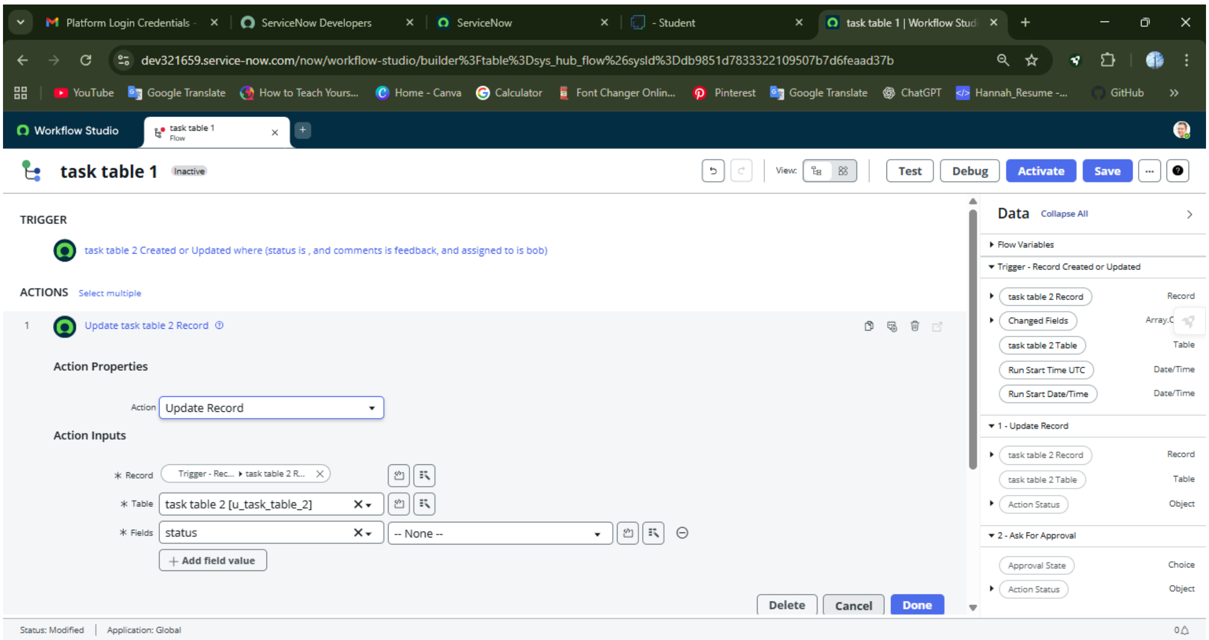
   Field: assigned to
   Operator: is
   Value: bob

5. Click **“Done”**



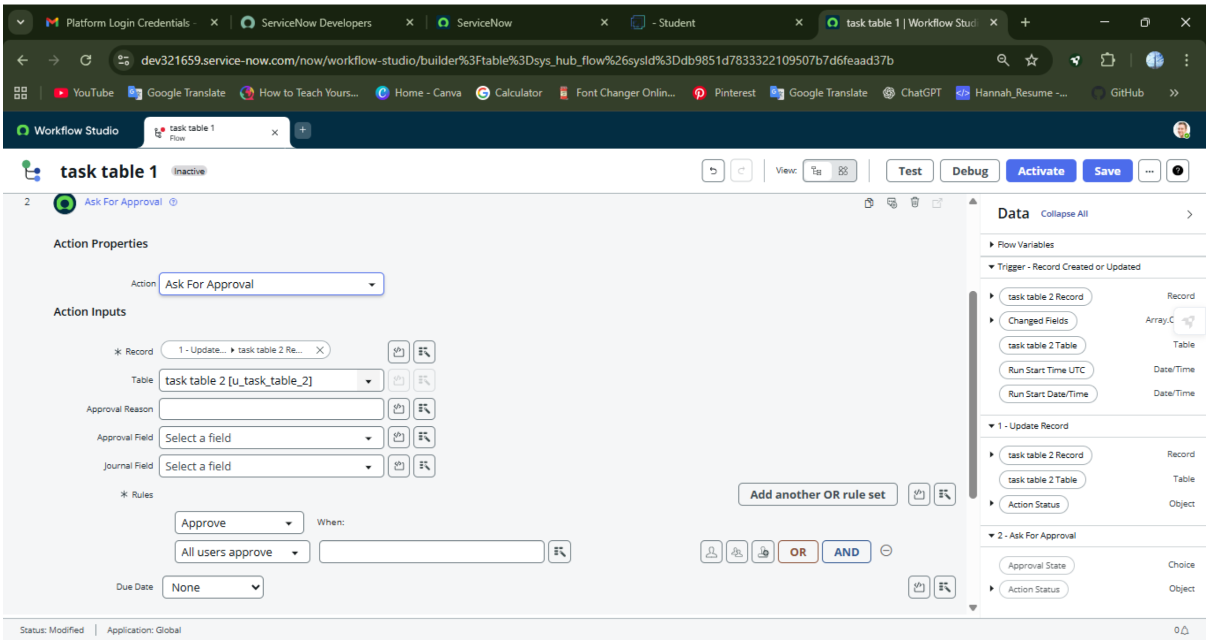
Next step:

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.

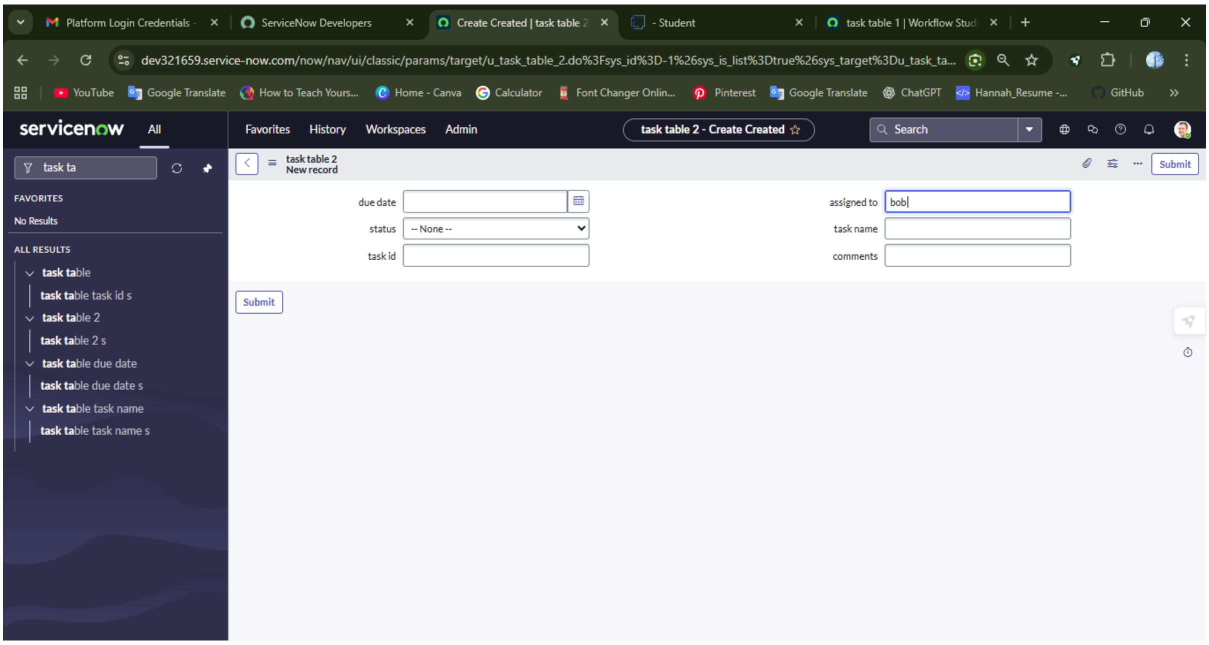


Next step:

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



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.