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

## Project Report

Team Id: NM2025TMID13044
Team Size : 4
Team Leader: Meshak Jebasraja.B
Team Members: Ebinezer B, Mohamed Ravuthar S,Goutham J

## Project Description:

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:

**1.Define Access Controls:** Clearly establish roles and groups to manage user permissions. Assign roles based on job function (e.g., Project Manager, Team Member) and use groups for teams or departments. This ensures users have only the access they need, following a "least privilege" model to prevent security risks.

2.**Streamline Workflows:** Automate the entire user lifecycle, including onboarding, role changes, and offboarding. This instantly grants or revokes access, reducing administrative effort and closing potential security gaps when employees join, change roles, or leave.

3.**Monitor and Audit:** Continuously monitor user activities and access rights. Implement a system to log who accessed what and when. Regular audits help identify and address unusual activity or policy violations, ensuring security policies are consistently enforced and data remains secure.

**TASK INITIATION:**

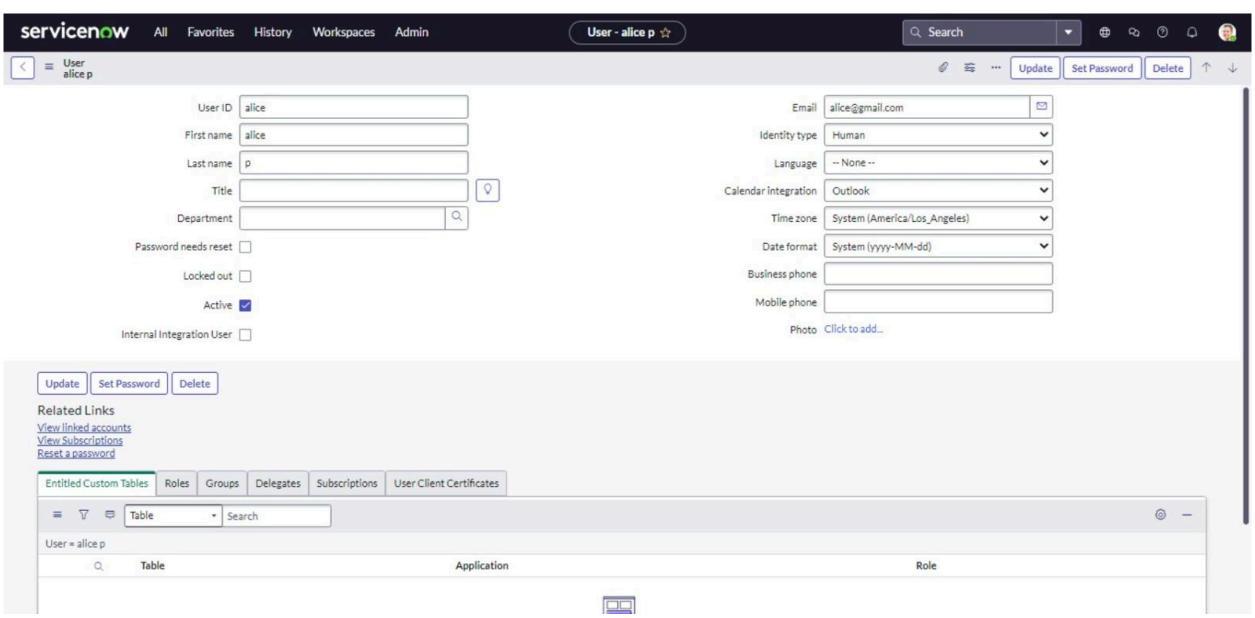
# Milestone 1: Users

## Create Users:

## Steps:

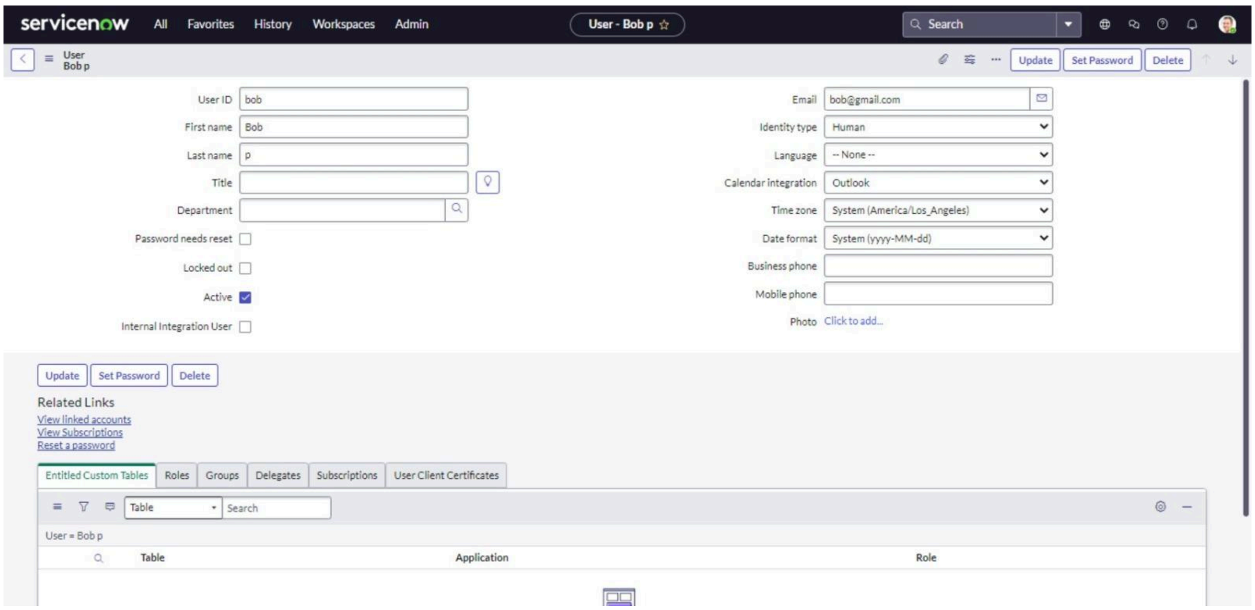
1. Open **ServiceNow** and log in to your account.
2. From the left navigation pane, click on **All** and use the search bar to look for **Users**.
3. Under the **System Security** section in the results, select **Users**.
4. On the Users page, click the **New** button to start creating a new user record.
5. Fill in the required user details, such as name, email, and any other necessary information.
6. Once all details are entered, click **Submit** to create the new user.

## Create one more user:



1. Enter the details for the second user.

2. Click **Submit** to save the new user.




## Milestone 2: Group

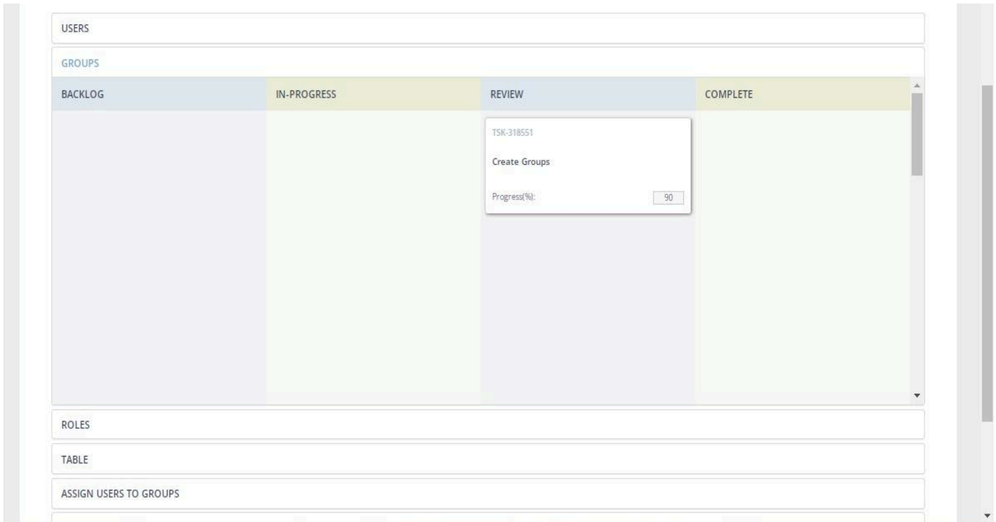
### Create Groups:

1. From the navigation pane , click on **All** and search for **Groups**. Under the **System Security** section in the results, select **Groups**.

2. On the Groups page, click the **New** button to create a new group.

3. Enter the required group details, such as the group name and description.

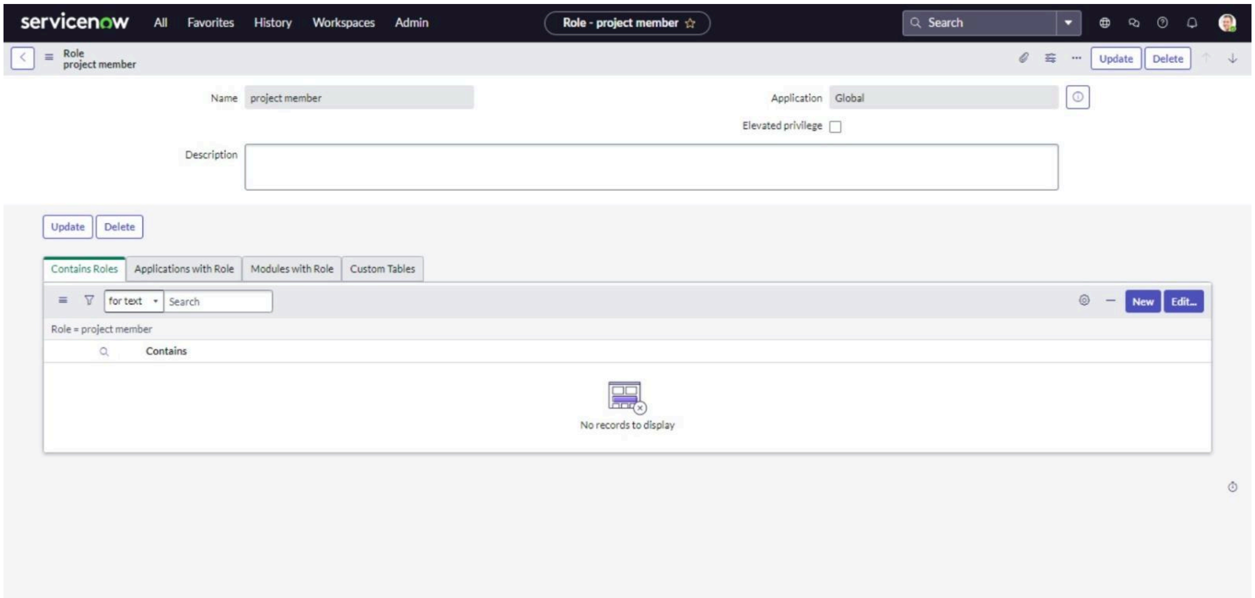
4. Once all details are entered, click **Submit** to save the group.




## Milestone 3: Roles

### Create Roles:

1. From the  navigation pane, click on **All** and search for **Roles**.
2. Under the **System Security** section in the results, select **Roles**.
3. On the Roles page, click the **New** button to create a new role.
4. Enter the required details for the role, such as role name and description.
5. Once all details are filled in, click **Submit** to save the new role.

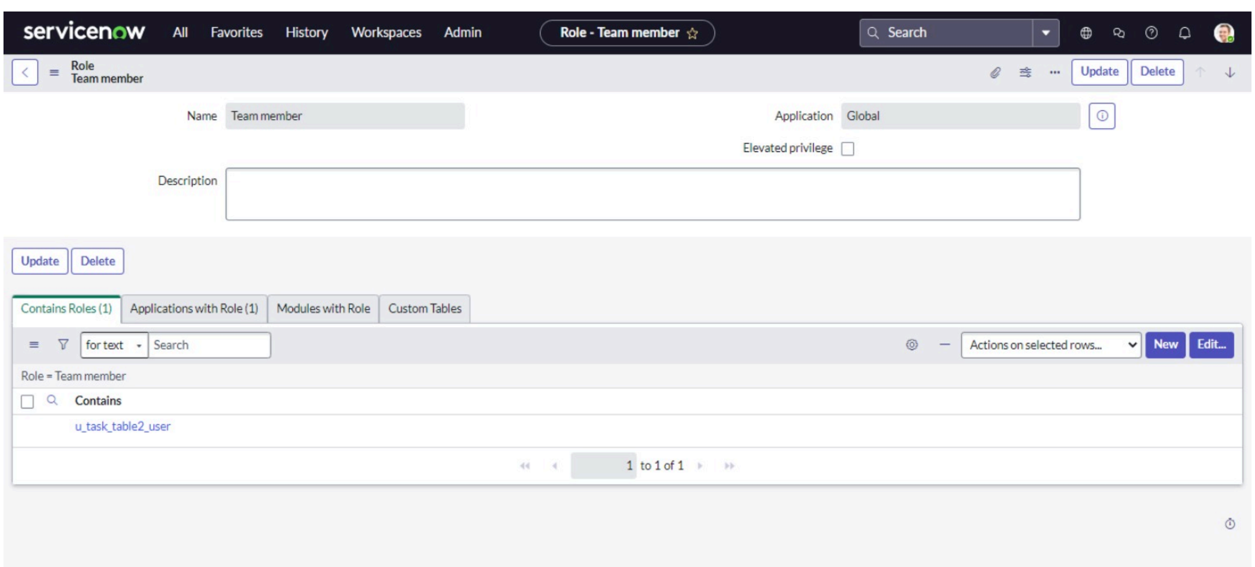



**Create one more role:**

7. To create another role, click on **New** again.

8.Enter the role details as **Team Member**.

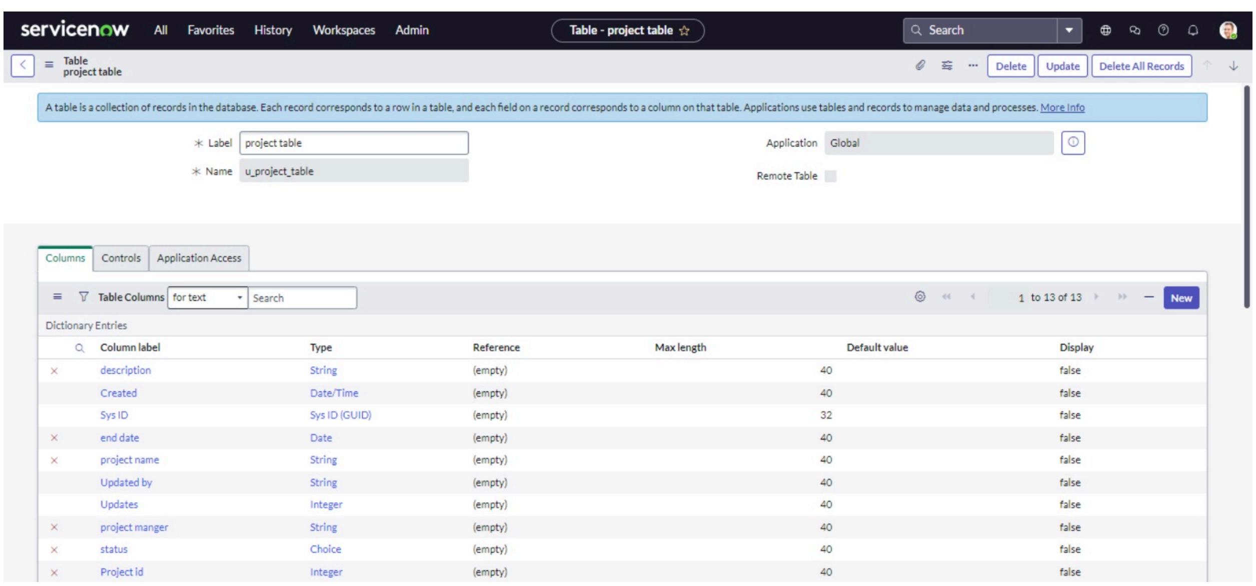
9.Click **Submit** to save this role.



## Milestone 4: Table

### Create Table:

1. From the navigation pane, click on **All** and search for **Tables**.
2. Under **System Definition**, select **Tables**.
3. Click **New** to create a new table.
4. Fill in the details:
5. **Label:** *Project Table*
6. Check the boxes for **Create module** and **Create mobile module**.
7. In the New **Menu Name**, enter the Project *Table*.
8. Under **Table Columns**, add the required columns.
9. Click **Submit** to save the table

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**Create one more table:**

10. Fill in the details:

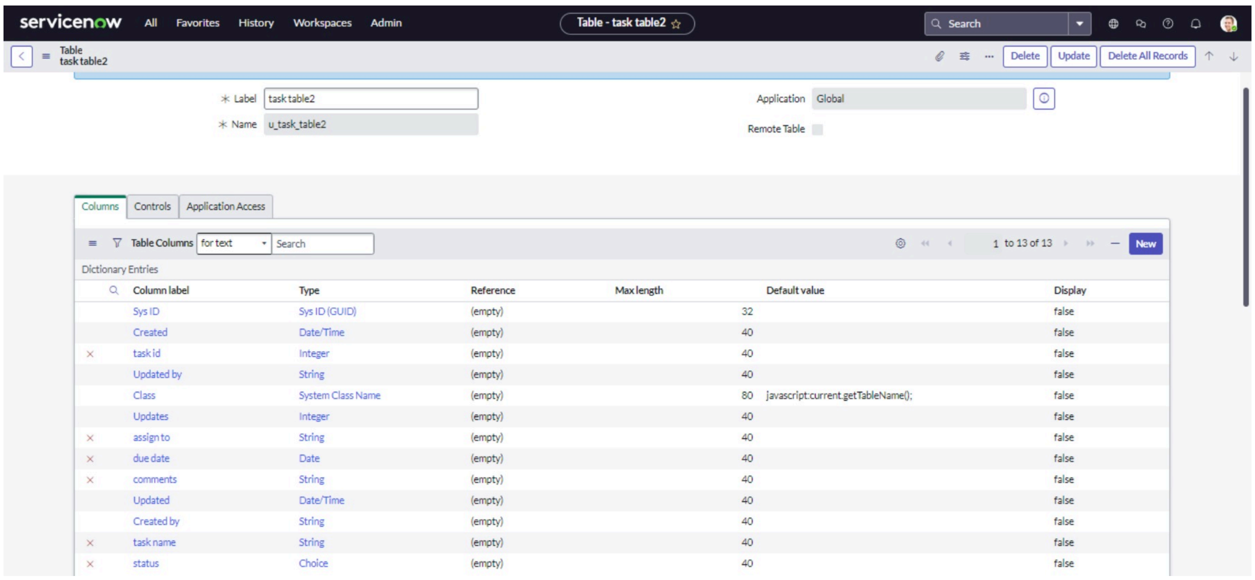
**Label:** *Task Table 2*

Check the boxes for **Create module** and **Create mobile module** if required.

In **New Menu Name**, enter *Task Table 2*.

Under **Table Columns**, add the required columns.

11.Click **Submit** to save the new table.




## Milestone 5: Assign Users To Groups

# Assign users to project team group

1. Open **ServiceNow** and log in to your account.

2. From the navigation pane, click on **All** and search for **Groups**.

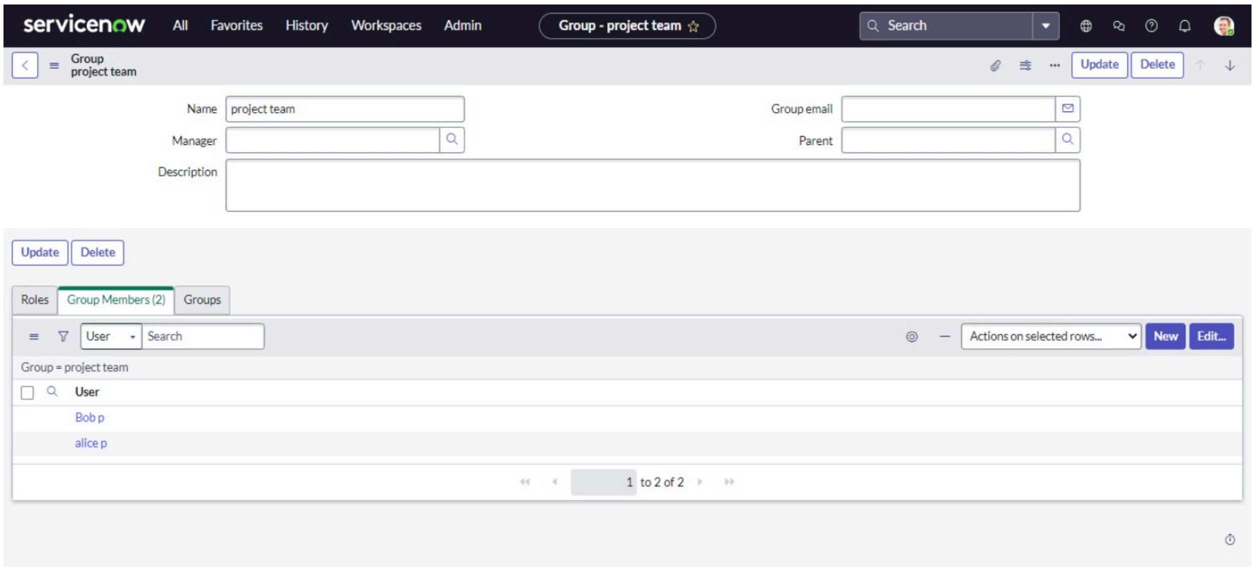
3. Under **System Security**, select **Groups**.

4. From the list, open the **Project Team** group.

5. Scroll to the **Group Members** section.

6. Click **Edit** to manage the members.

7. Select **Alice P** and **Bob P** from the available users, then click **Save**.




## Milestone 6: Assign Roles To Users

## Activity 1:

## Assign Roles To Alice User

1. Open ServiceNow and log in to your account.

2. From the navigation pane, click on All and search for Users.

3. Under System Security, select Users.

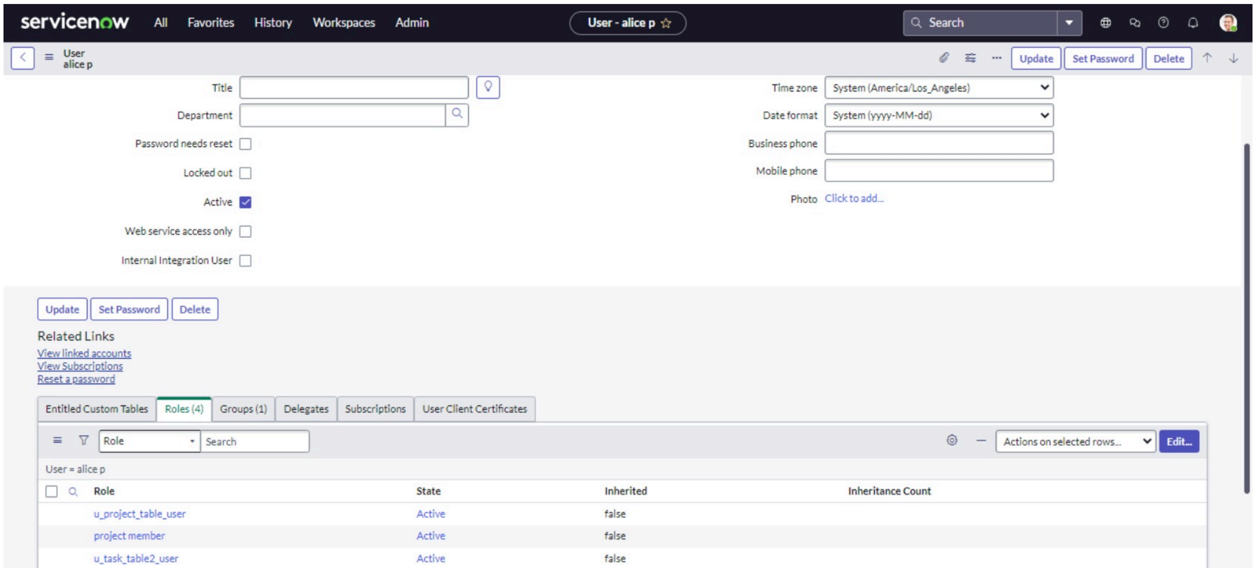
4. From the list, open the Project Manager user.

5. In the user form, scroll to the Groups section.

6. Click Edit, select Project Member, and save the changes.

7. Next, in the Roles section, click Edit and add the roles u_project_table and u_task_table.

8. Click Save, then Update the form to apply the changes.



## Activity 2:

## Assign Roles To Bob User

1. Open **ServiceNow** and log in to your account.

2. From the navigation pane, click on **All** and search for **Users**.

3. Under **System Security**, select **Users**.

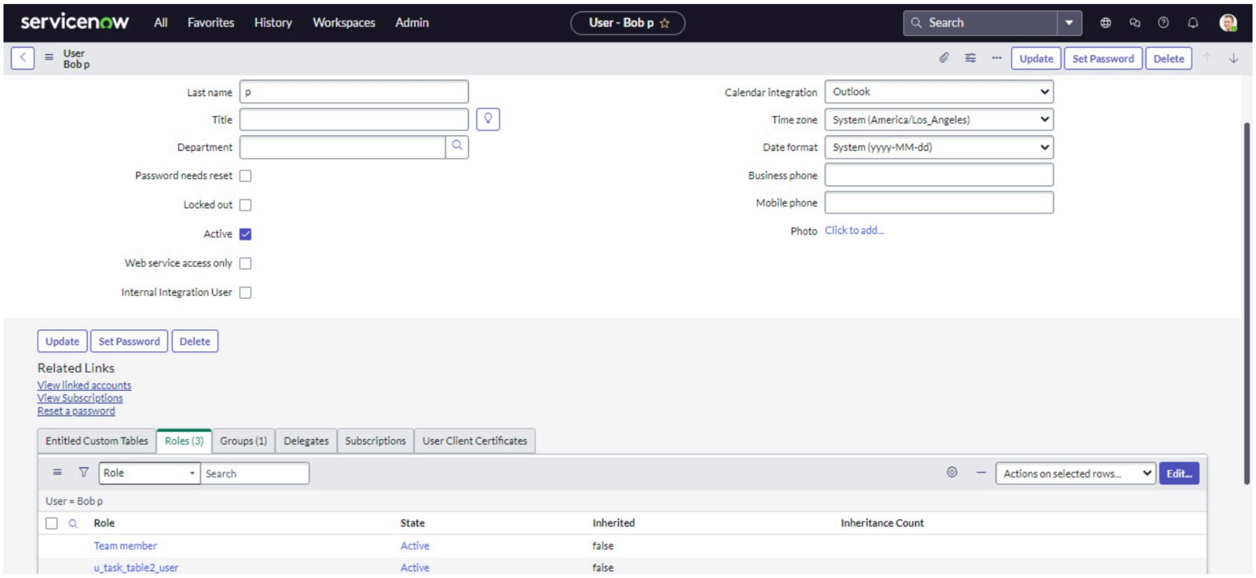
4. From the list, open the **Bob P** user.

5. In the user form, scroll to the **Groups** section.

6. Click **Edit**, assign **Team Member** and the required **Table Role**, then save the changes.

7. Click on the profile icon and **Impersonate User** as **Bob P**.

8. Once impersonated, you should be able to see **Task Table 2** in the navigation pane




## Milestone 7:Application Access

### Assign Table Access To Application

1. When a table is created, ServiceNow automatically generates an application and a module for it.

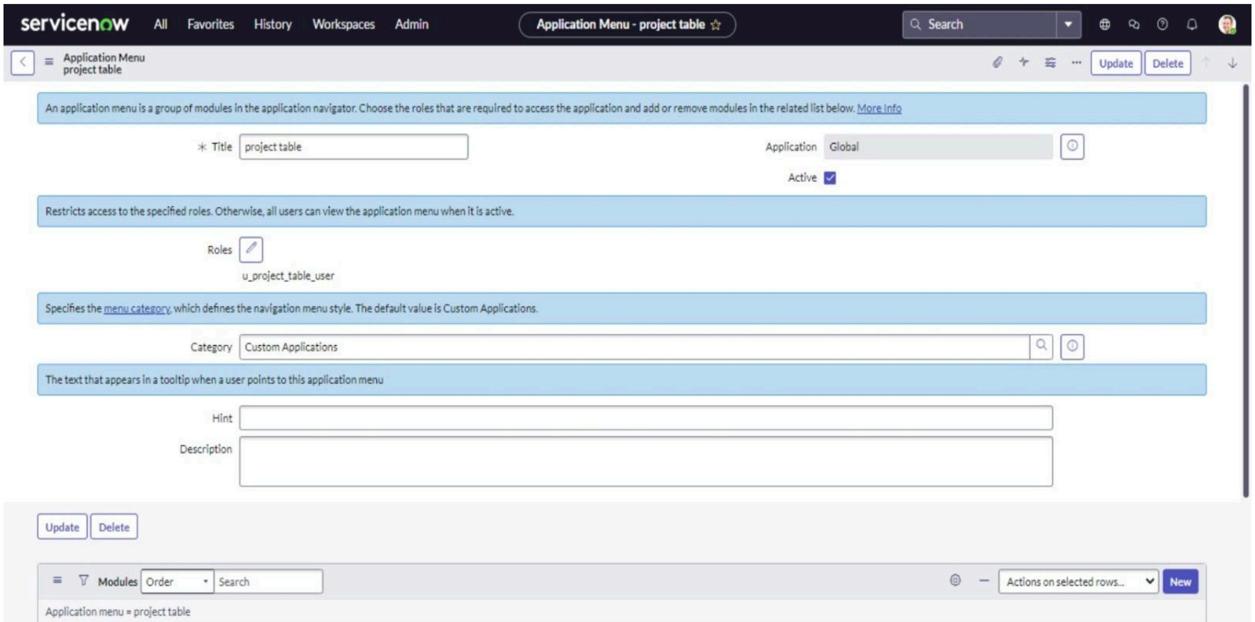
2. In the Application Navigator, search for the **Project Table** application.

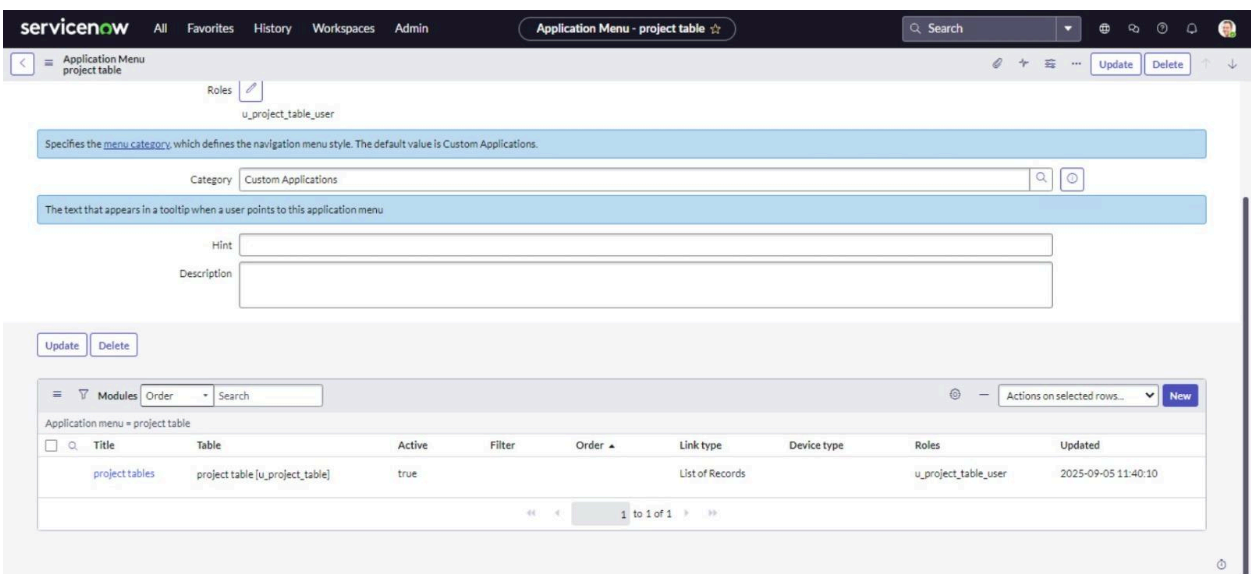
3. Open the application, then click **Edit Module**.

4. Assign the **Project Member** role to this application.

5. Next, search for the **Task Table 2** application and open it.

6. Click **Edit Application**, then assign both the **Project Member** and **Team Member** roles.




## Milestone 8: Access Control List

### Create ACL

1. Open ServiceNow and log in to your account.

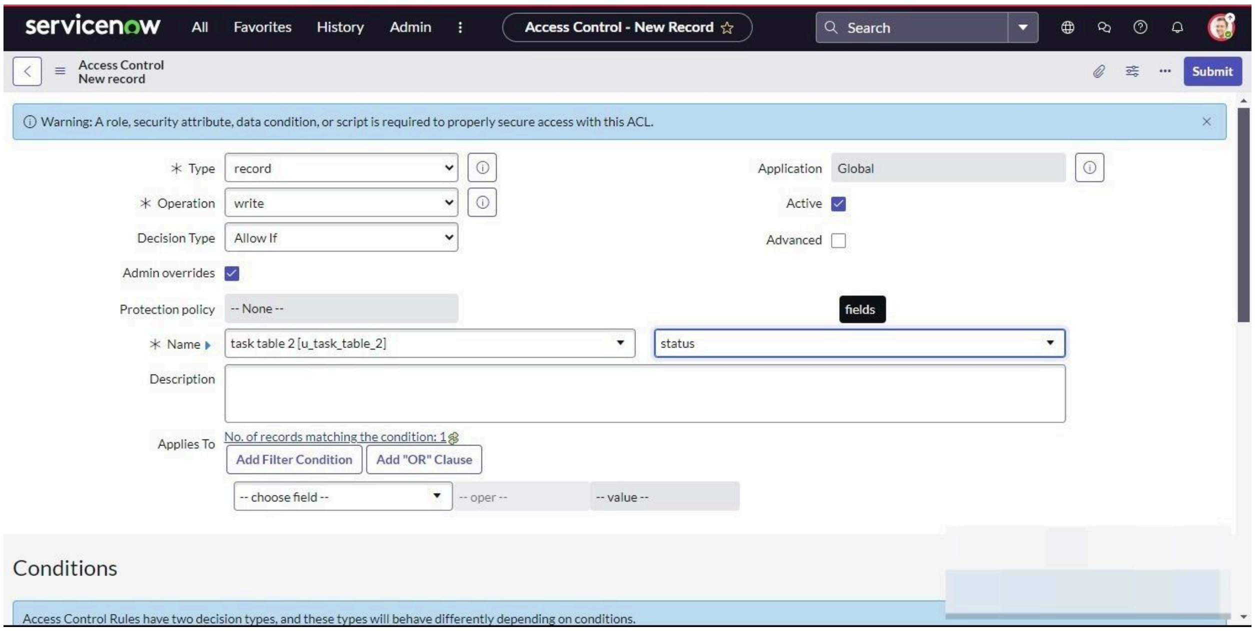
2. From the navigation pane, click on All and search for ACL.

3. Under System Security, select Access Control (ACL).

4. At the top, click Elevate Role to gain the necessary permissions.

5. Click New to create a new ACL.

6. Fill in the required details for the ACL.



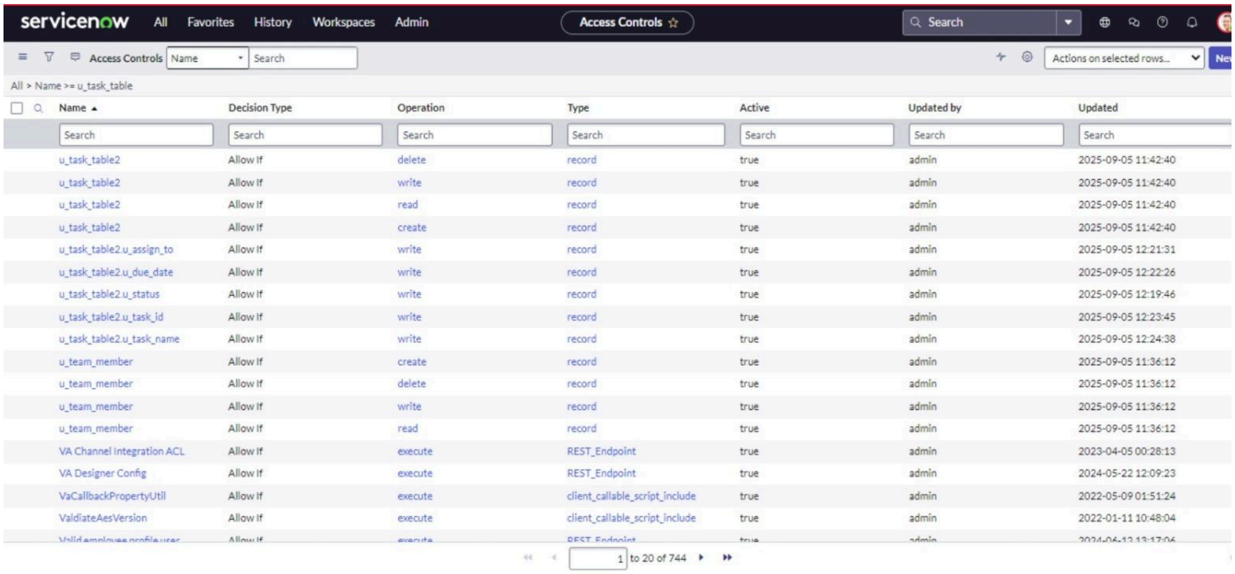

7. Scroll down to the Requires Role section.

8. Double-click to insert a new row.

9. Assign the Task Table and Team Member role.

10. Click Submit to save the ACL.

11. Repeat the process to create four additional ACLs for the specified fields.



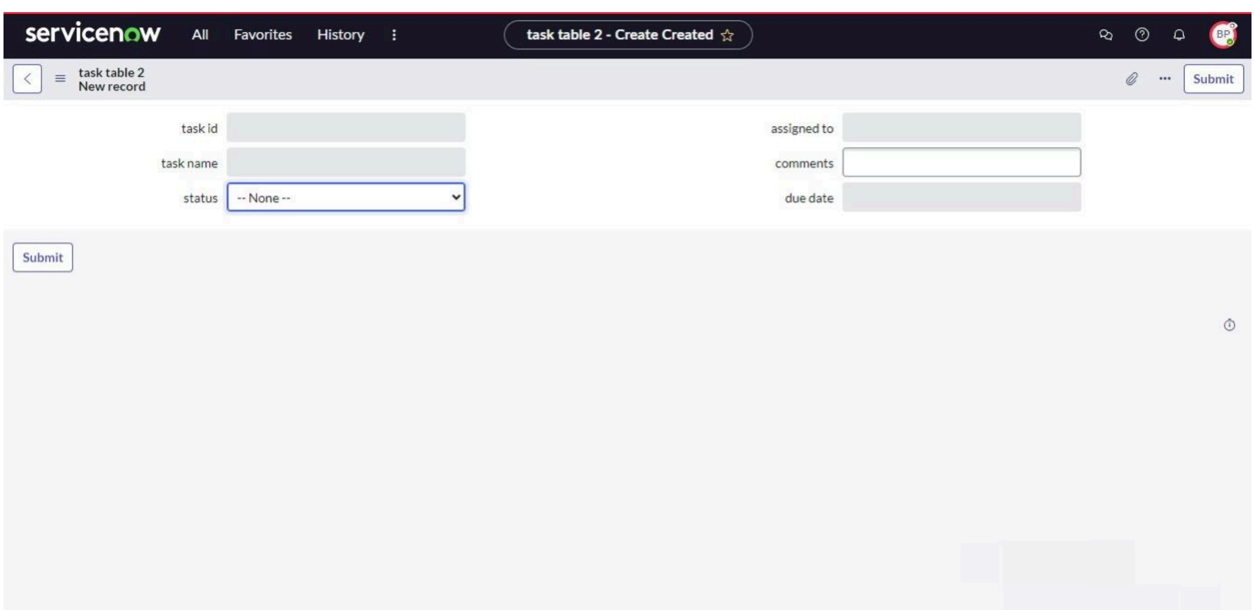

12. Click the profile icon at the top right corner.

13. Select Impersonate User.

14. Choose the Bob user.

15. From the navigation pane, go to All and open Task Table 2 under the application menu.

16. Verify that the Comment and Status fields have edit access.

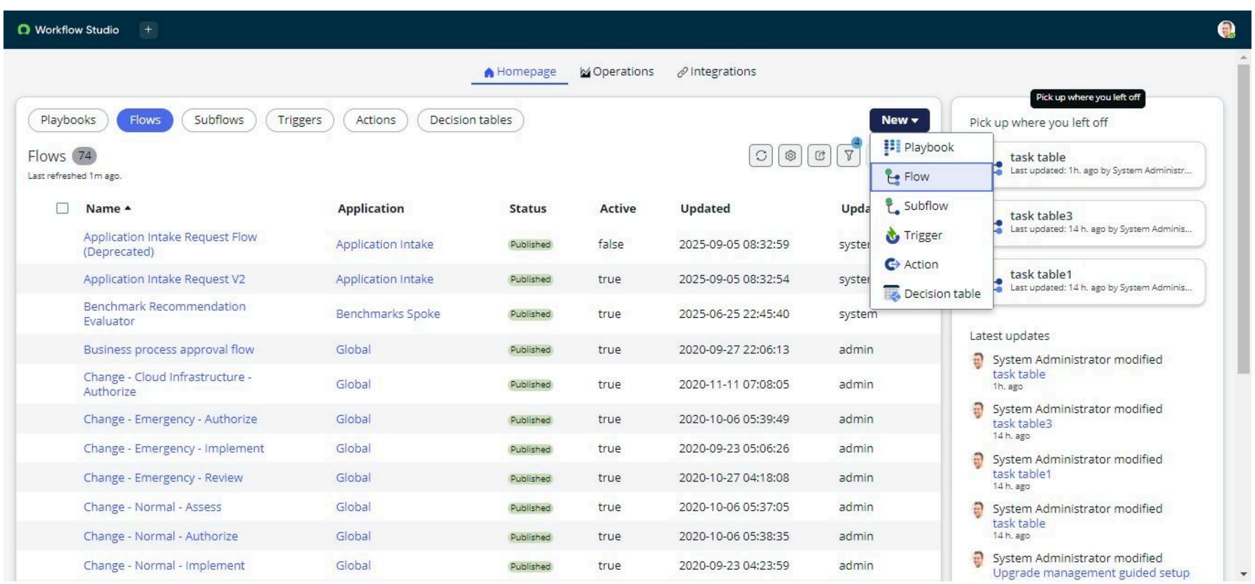


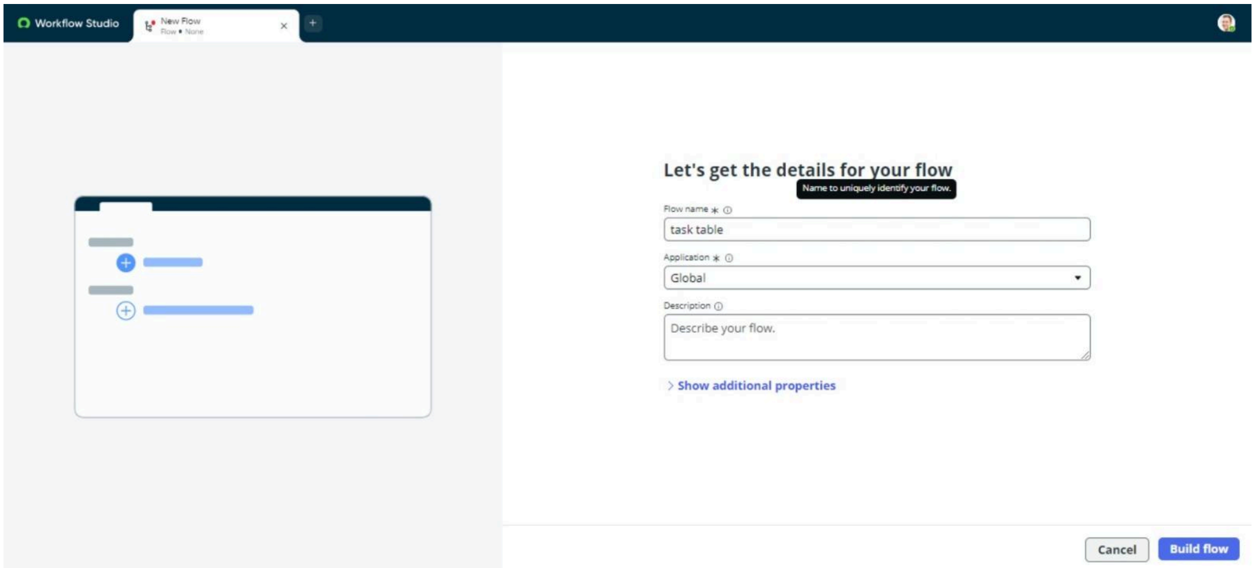
## Milestone 9: Flow

### Create a Flow To Assign Operation Tickets To Group

### Activity 1:

1. Open **ServiceNow** and log in to your account.
2. From the navigation pane, click on **All** and search for **Flow Designer**.
3. Under **Process Automation**, select **Flow Designer**.
4. Once Flow Designer opens, click **New** and choose **Flow**.
5. In the **Flow Properties**, enter the **Flow Name** as *Task Table*.
6. Set the **Application** to *Global*.
7. Click **Build Flow** to start designing the flow.






### Activity 2:

1. In the Flow Designer, click **Add a Trigger**.

2. From the available options, search for **Create Record** and select it.

3. Set the **Table Name** to *Task Table*.

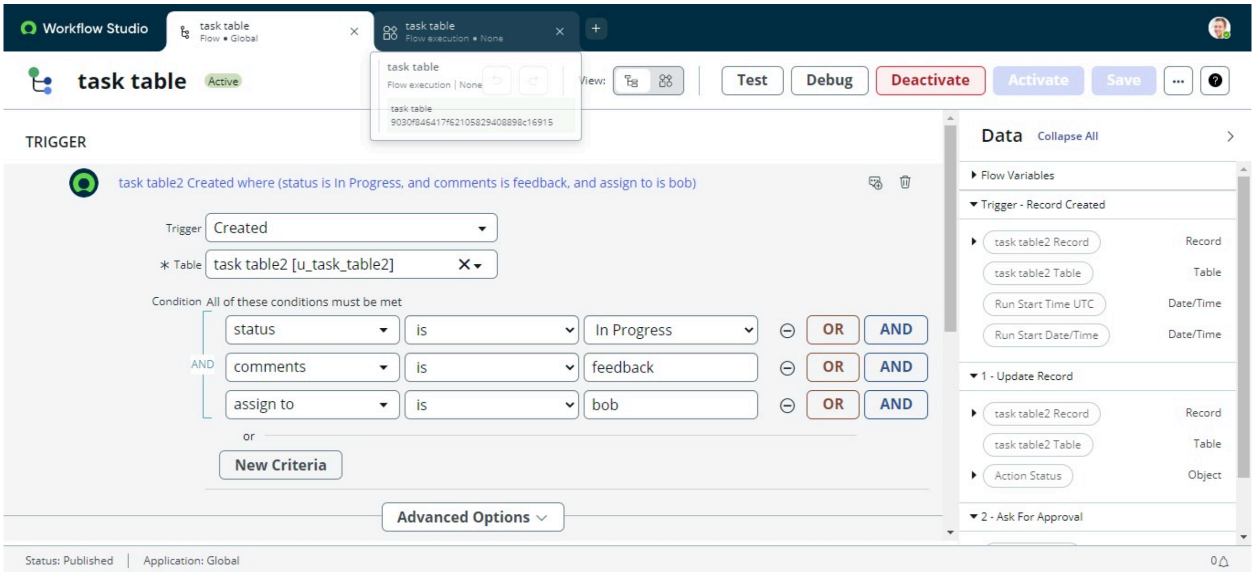
4. Define the conditions as follows:

- **Field:** Status → **Operator:** Is → **Value:** In Progress

- **Field:** Comments → **Operator:** Is → **Value:** Feedback

- **Field:** Assigned To → **Operator:** Is → **Value:** Bob

5.Once all conditions are set, click **Done** to save the trigger.




## Activity 3:

1. In the Flow Designer, click **Add an Action**.

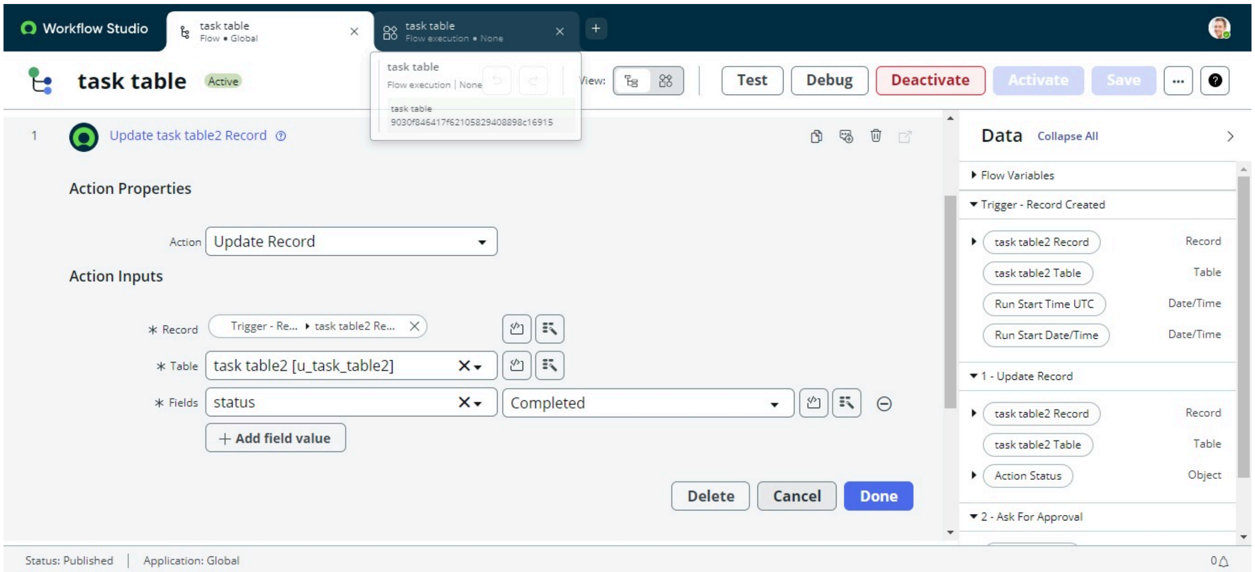
2. From the options, search for **Update Records** and select it.

3. In the **Record** field, drag the fields from the **Data Pill** panel on the right side.

4. The **Table** will be automatically assigned after selecting the record.

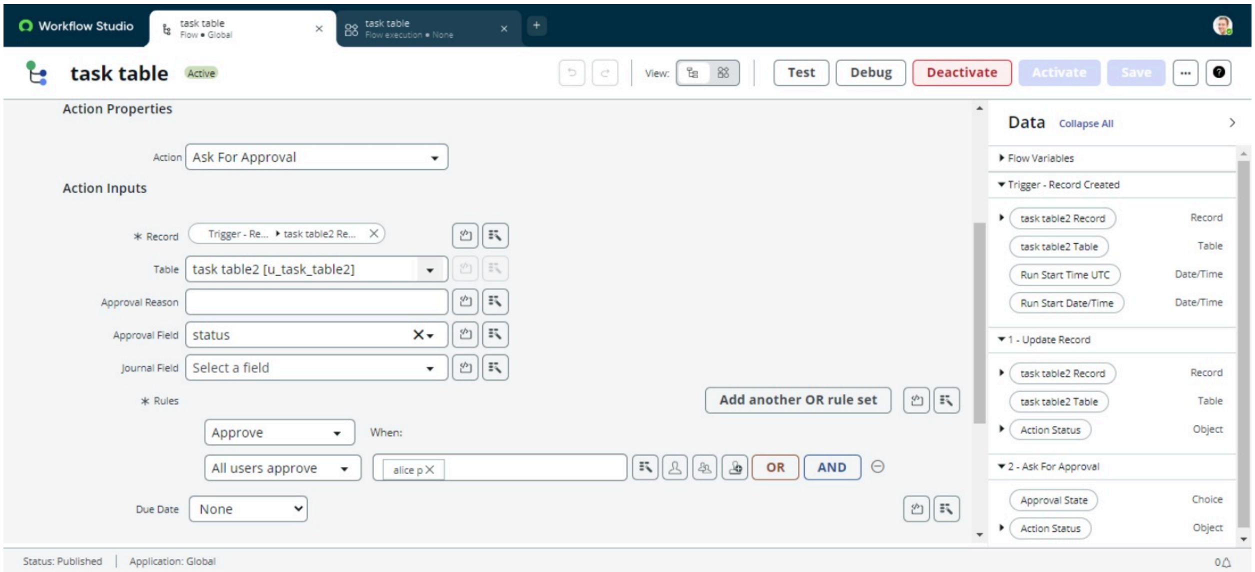
5. Add the field **Status** and set its value to *Completed*.

6. Click **Done** to save the action.




## Activity 4:

1. In the **Actions** section of Flow Designer, click **Add an Action**.
2. From the list of actions, search for **Ask for Approval** and select it.
3. In the **Record** field, drag the fields from the **Data Pill** panel on the right side.
4. The **Table** will be automatically assigned after selecting the record.
5. Set the **Approval Field** to *Status*.
6. Assign **Alice P** as the approver.
7. Click **Done** to save the action.




8. Go to the **Application Navigator** and search for the Task **Table**.

9. Verify that the **Status** field is updated to *Complete*.

10. Again in the **Application Navigator**, search for **My Approvals**.

11. Under **Service Desk**, click on **My Approvals**.

12. You will see an approval request assigned to **Alice P**.

13. Right-click on the request and select **Approve**.

## Conclusion:

This scenario demonstrates a structured approach to project management by clearly defining the roles of Alice and Bob within the workflow. With Alice providing oversight and Bob focusing on execution, the team collaborates effectively to drive progress. The use of tables organizes essential project data, making it easier to track tasks, monitor updates, and measure overall progress. This system not only promotes accountability but also enhances communication and transparency, ultimately supporting the successful completion of projects.