Optimizing Users,Groups,Role Management with Access Control and Work Flow

Term Id: NM2025TMID17628

Term Members: 5

Term Leader: SARANYA S

Term Member 1: KEERTHIKA J

Term Member 2: JANANI V

Term Member 3: SYED ALI FATHIMA A

Term Member 4: EGASTHIYA R V

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.

Objective:

Step 1: Define Roles and Responsibilities

Objective: Clearly define the roles of Project Manager (Alice) and Team Member (Bob) with specific responsibilities and access levels.

Outcome: Well-defined roles and responsibilities to avoid confusion and overlapping work.

Step 2: Implement Access Control

Objective: Set up access controls to ensure that each role has the necessary permissions to perform their tasks without compromising sensitive information.

Outcome: Access controls in place to prevent unauthorized access and ensure data security.

Step 3: Design a Structured Workflow

Objective: Create a structured workflow that outlines the project lifecycle, including task assignments, progress tracking, and completion.

Outcome: A clear and efficient workflow that ensures accountability and transparency throughout the project.

Step 4: Assign Tasks and Track Progress

Objective: Use the workflow to assign tasks to team members and track progress in real-time.

Outcome: Effective task management and progress tracking to ensure project timelines are met.

Step 5: Monitor and Evaluate

Objective: Continuously monitor the workflow and access controls to identify areas for improvement and ensure accountability.

Outcome: Ongoing evaluation and improvement of the workflow and access controls to optimize project management.

Skills: Users,Groups,Roles,Table,Access Control List, Flow designer.

TASK INITIATION

Milestone 1: Users

Activity 1: Create User

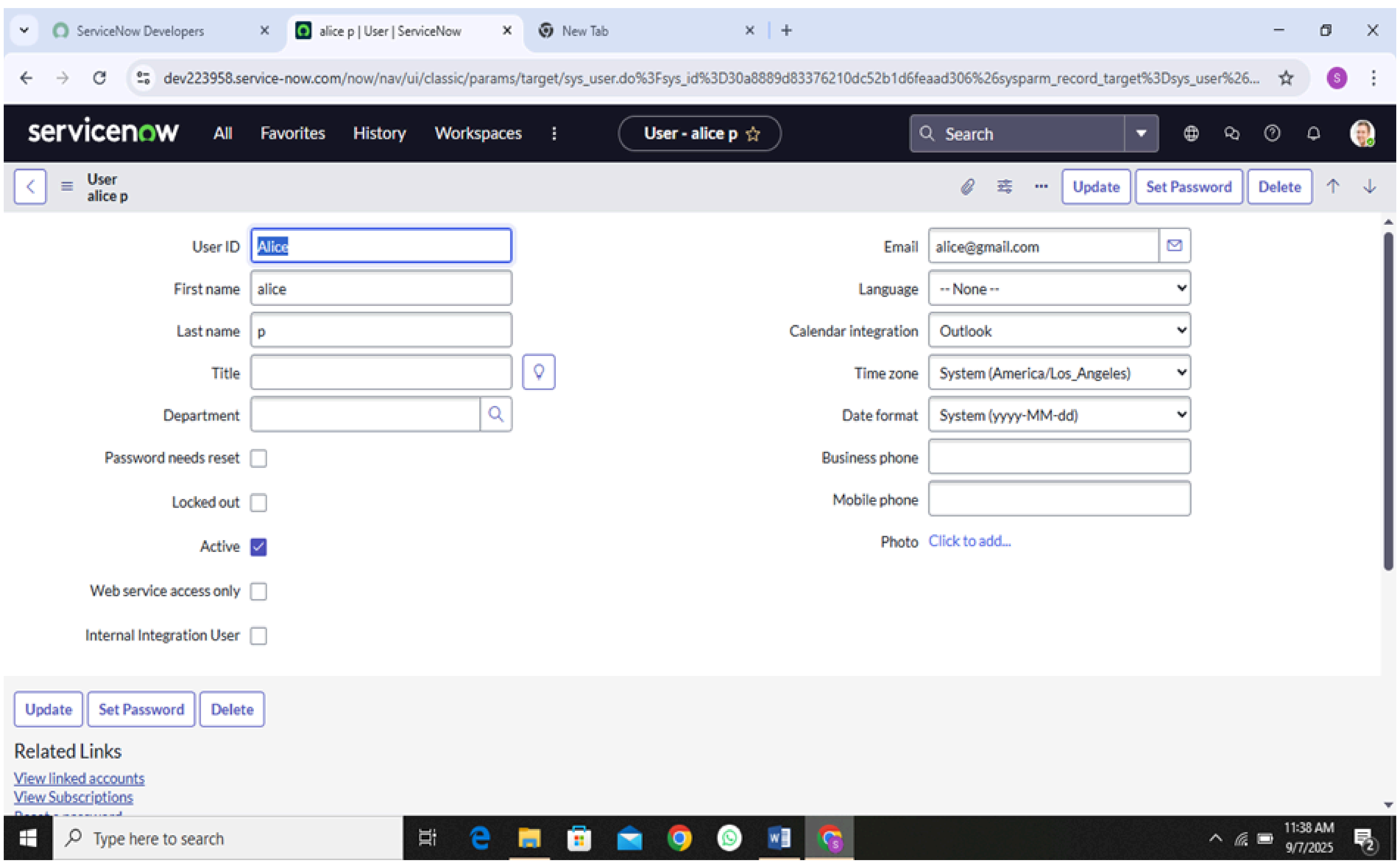
1. Open service now
2. Click on All >>search for users

3. Select Users under system security

4. Click on new

5. Fill the following details to create a new user

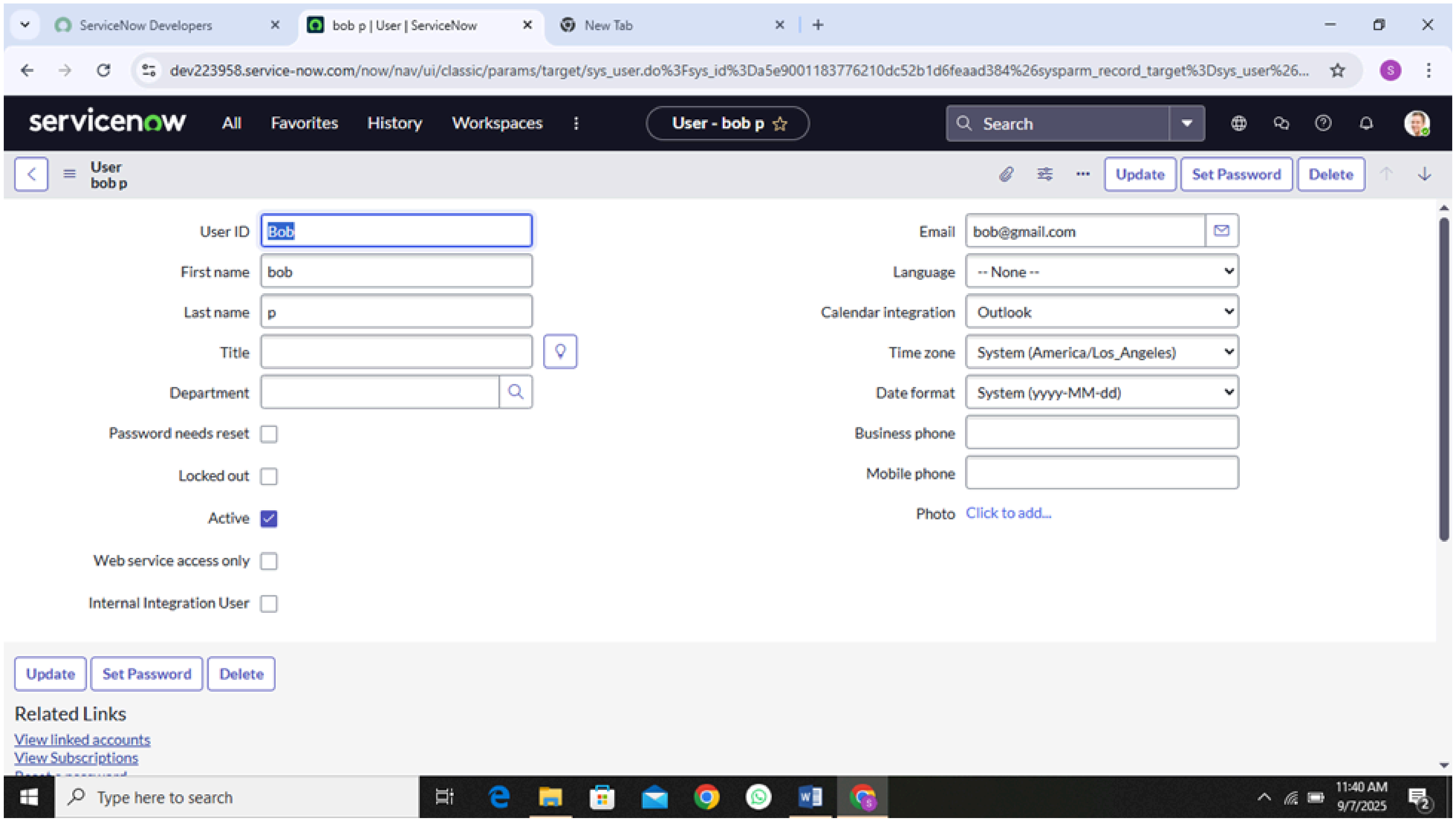
6. Click on submit



Create one more user:

7. Create another user with the following details

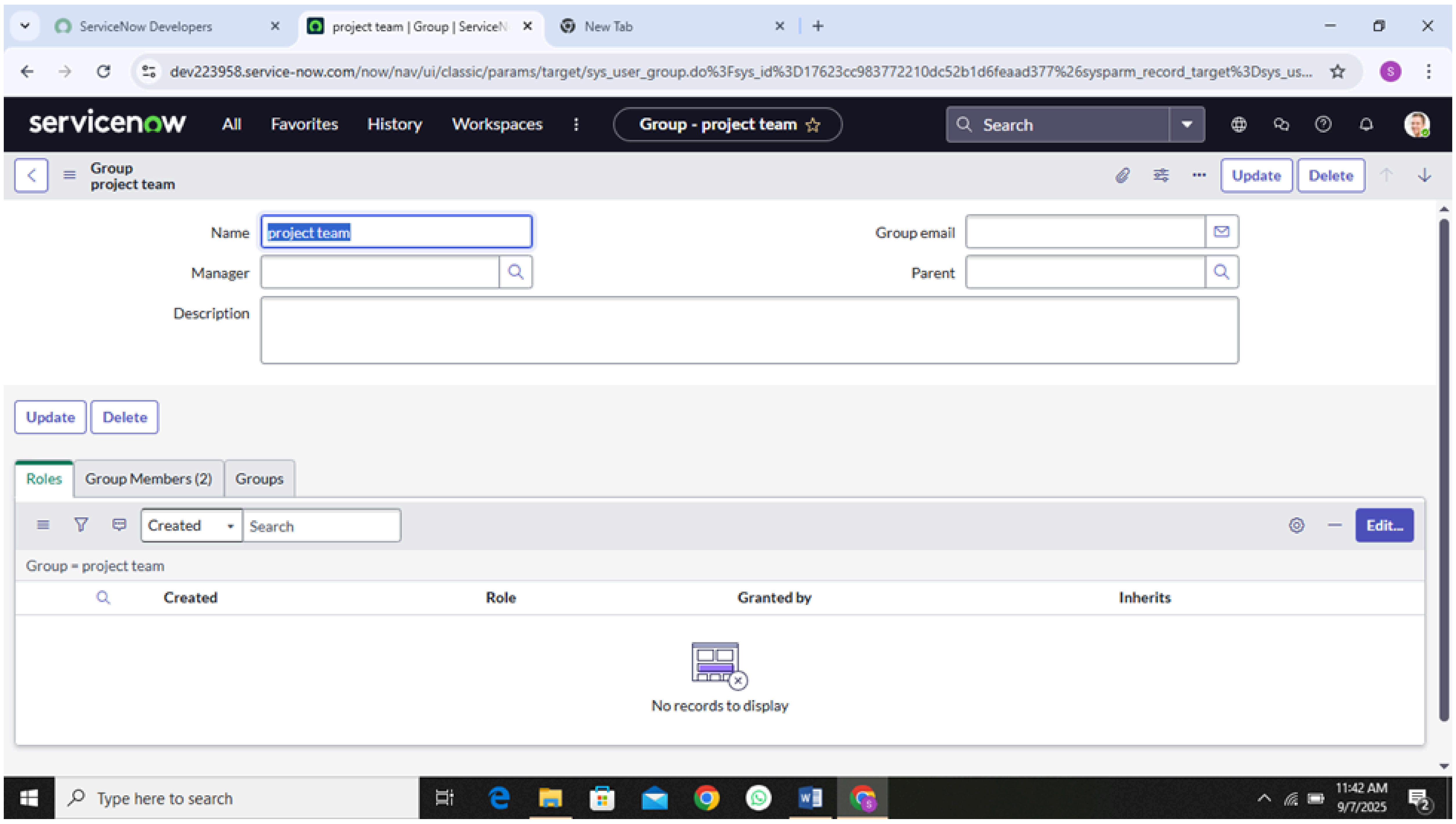
8. Click on submit



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



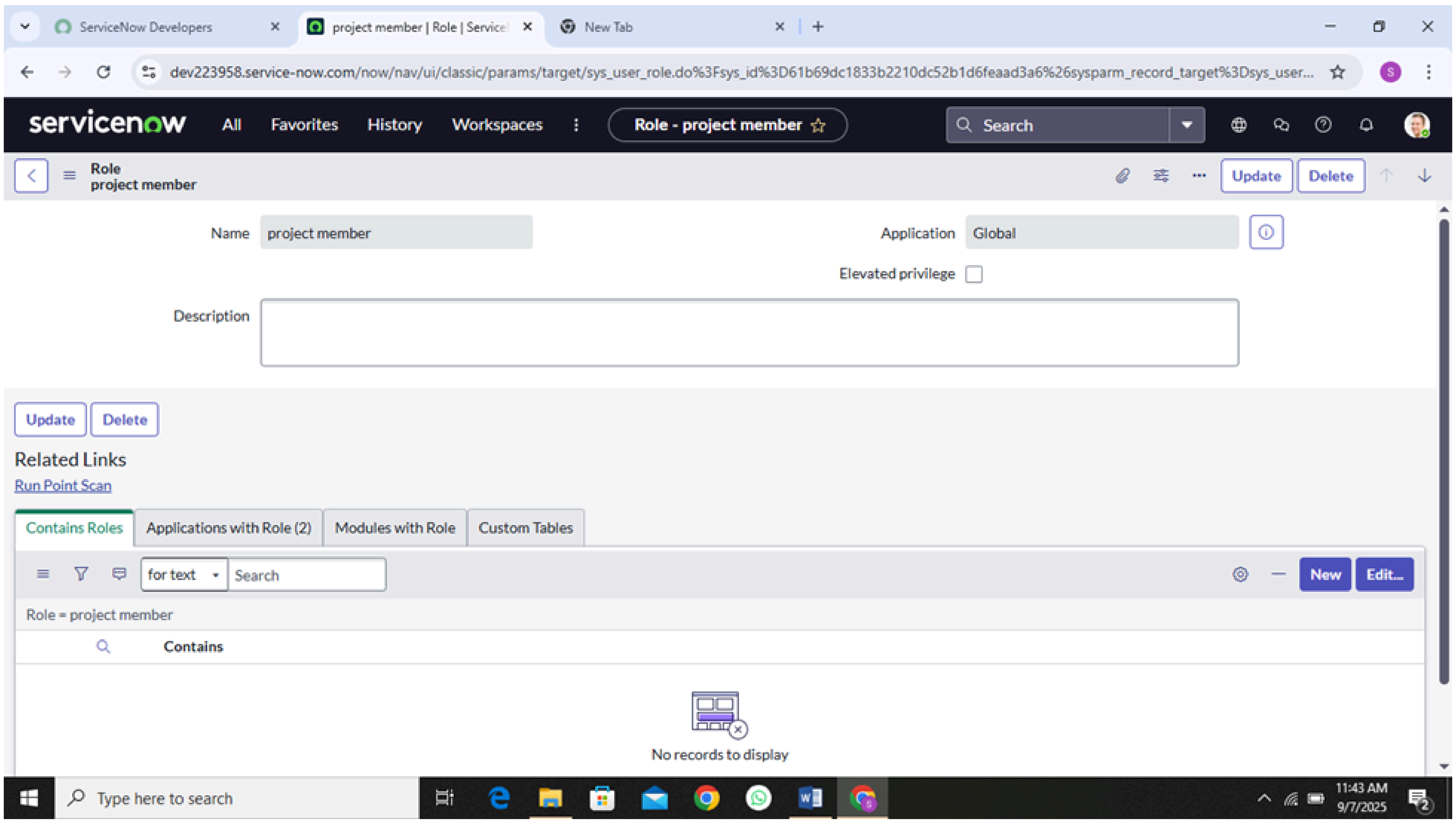
Milestone 3: Roles

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

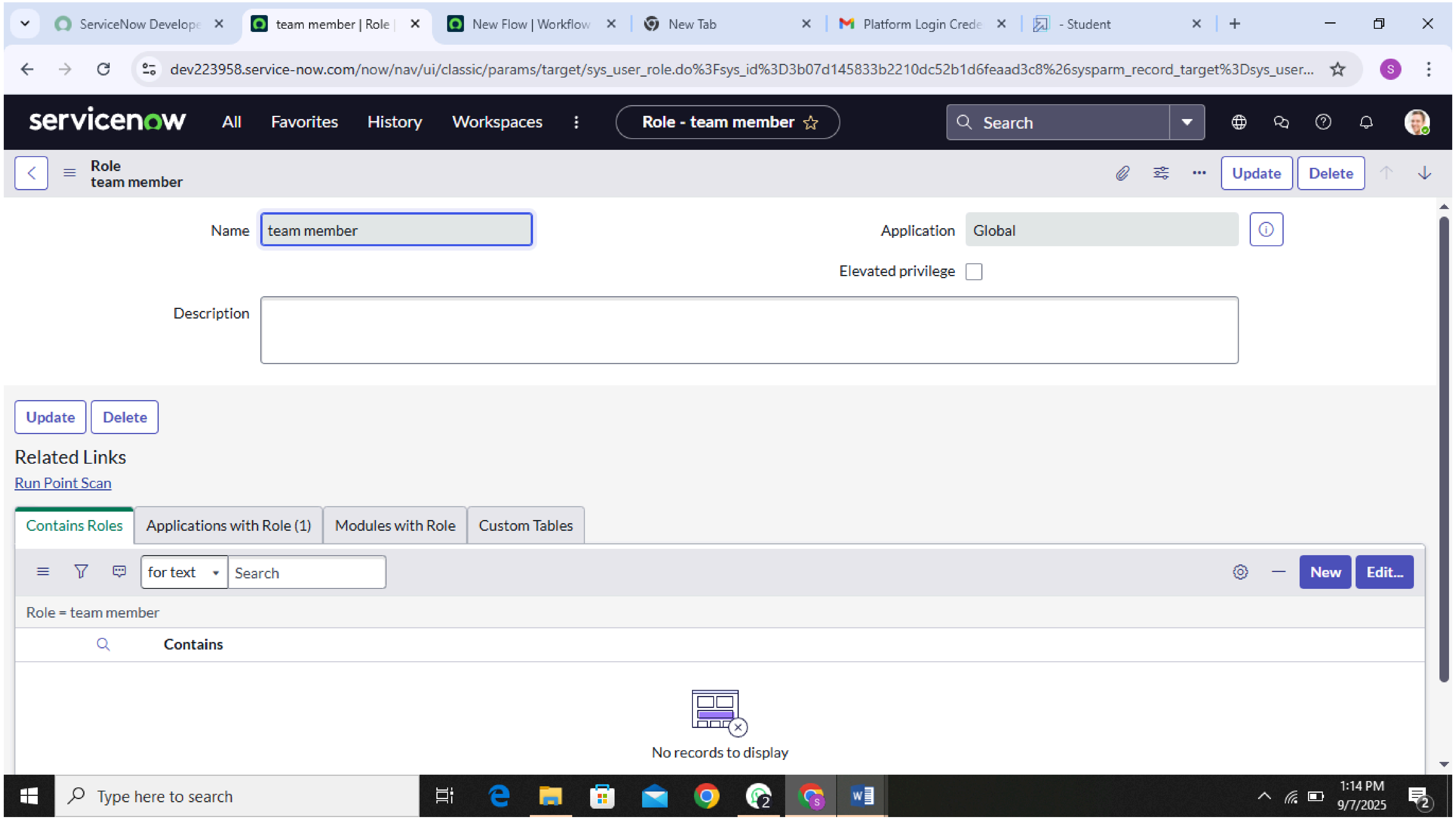
6. Click on submit



Create one more role:

7. Create another role with the following details: Team member

8. Click on submit



Milestone 4: Table

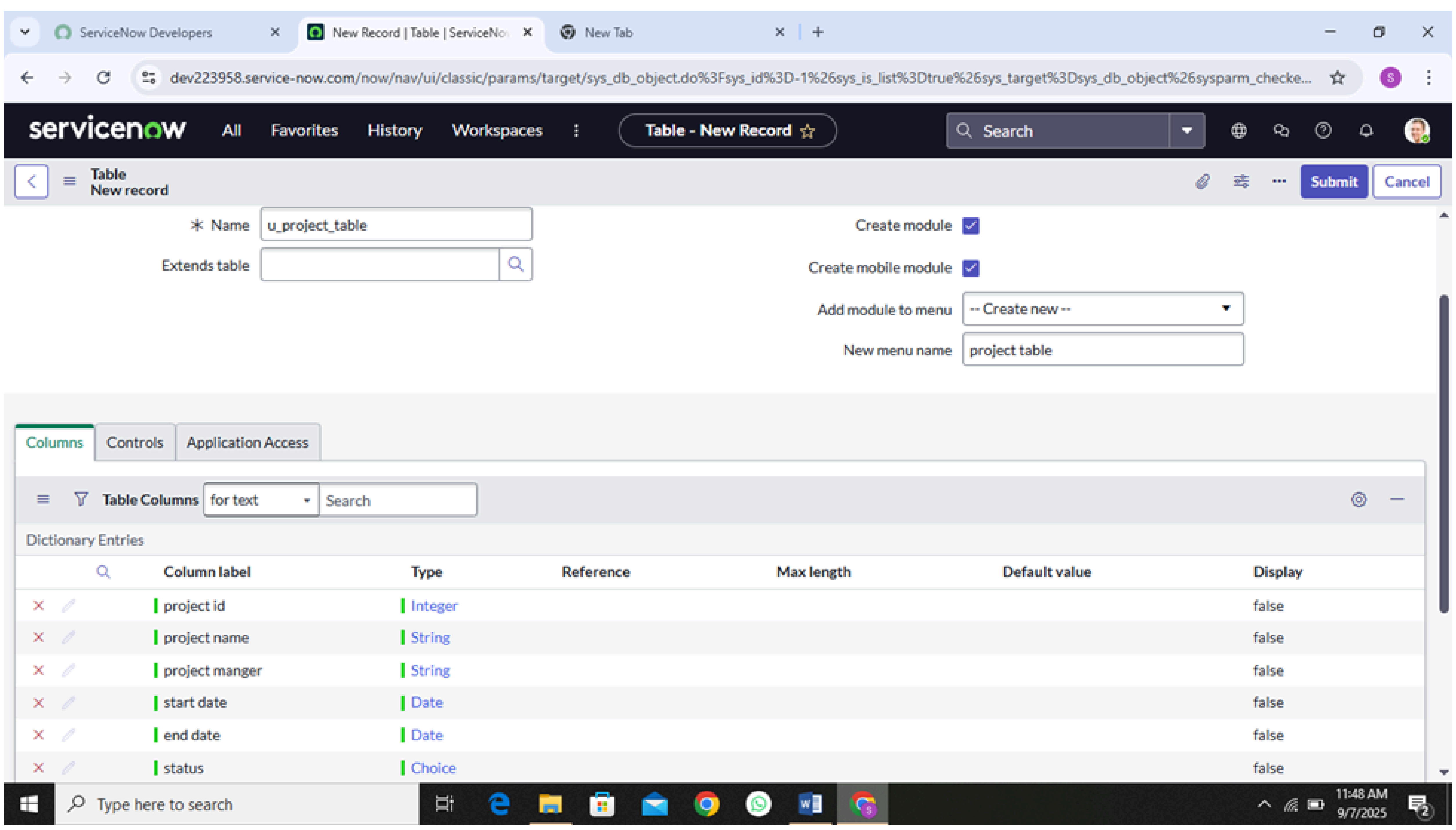
Activity 1: Create Table

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

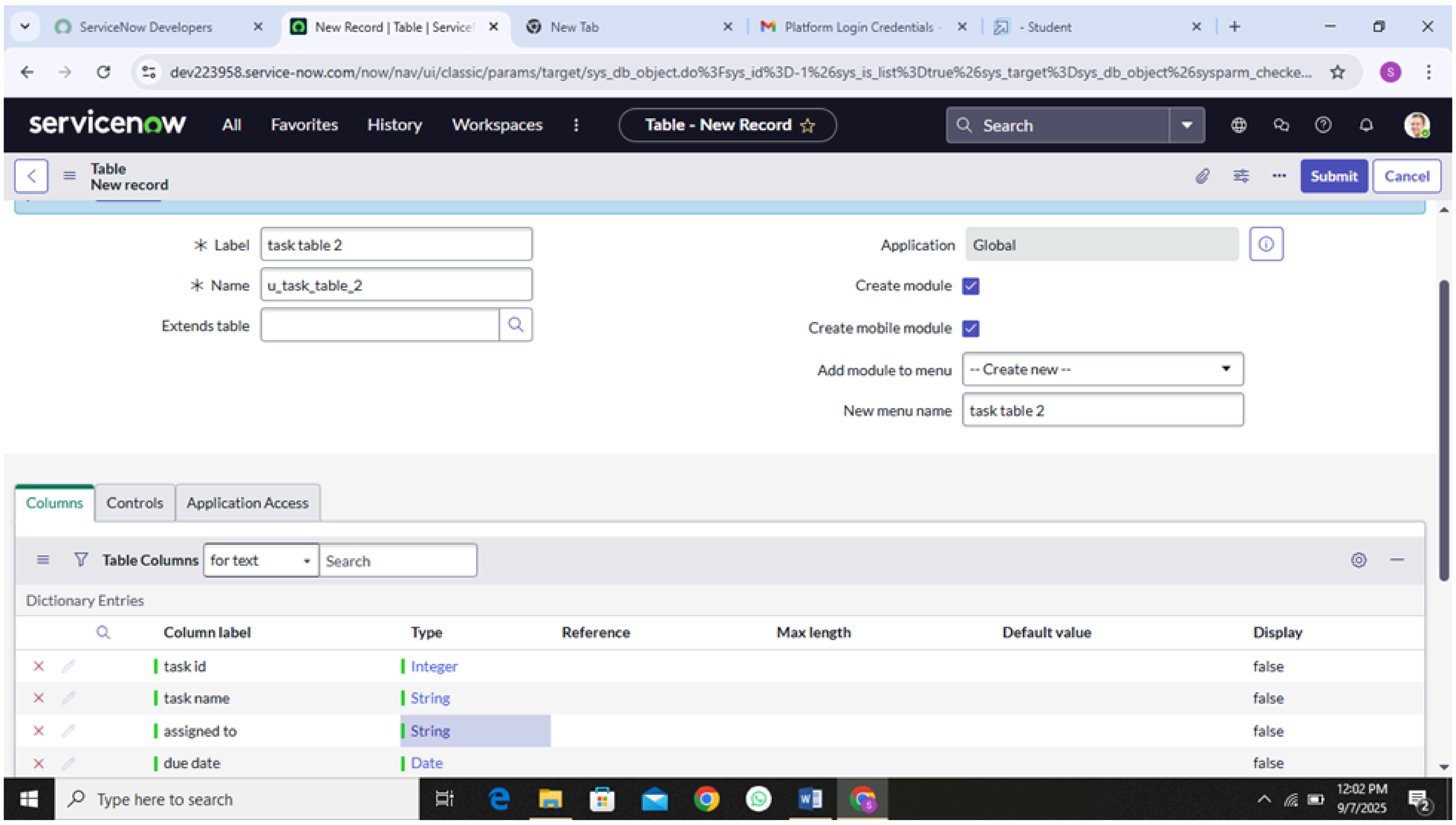
6. Under new menu name: project table
7. Under table columns give the columns
8. Click on submit



Create one more table:

9. Create another table as: task table 2 and fill with following details.

10. Click on submit.

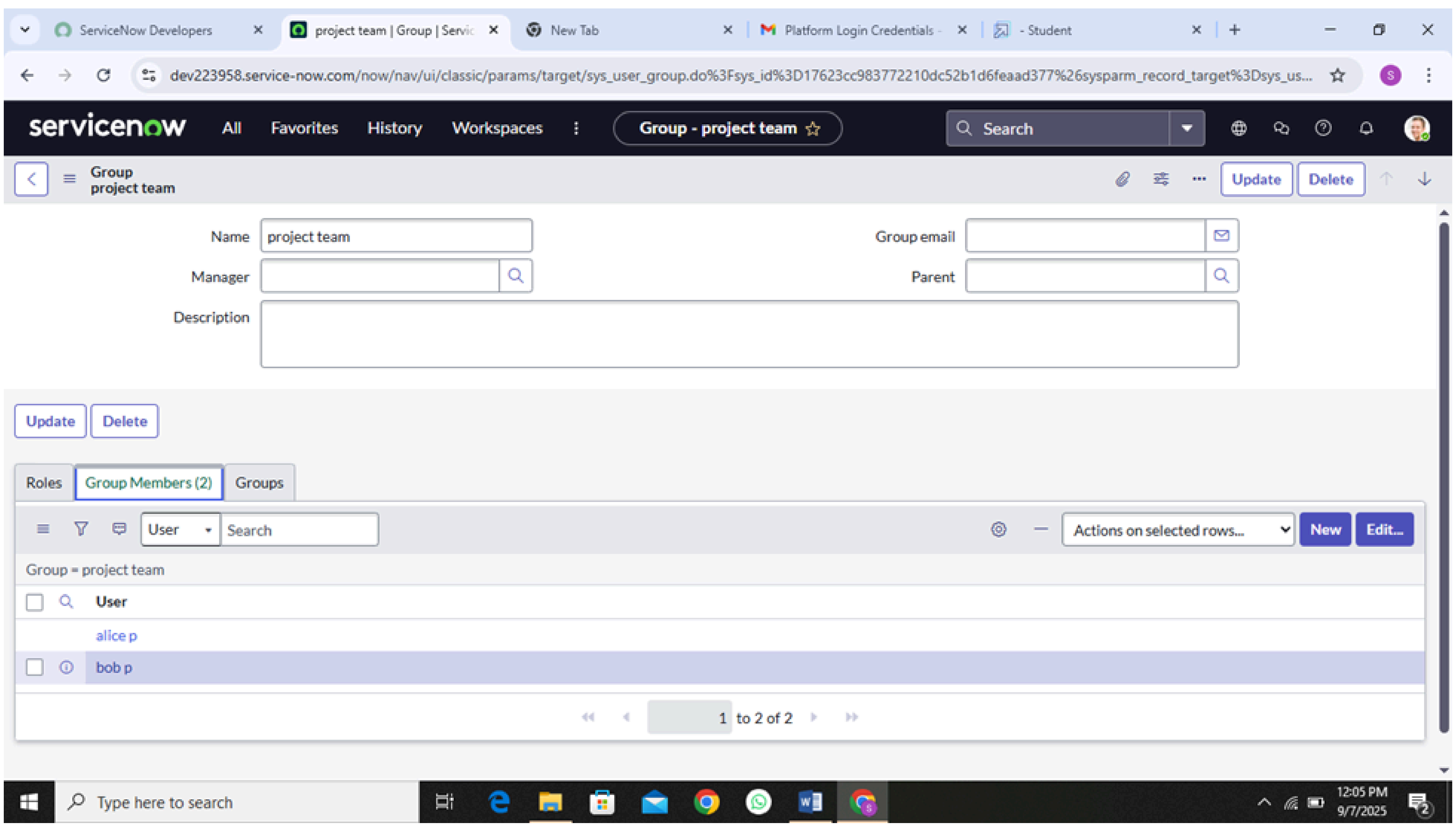


Milestone 5: Assign users to groups

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 service now. Click on All >> search for user

2. Select tables under system definition

3. Select the project manager user

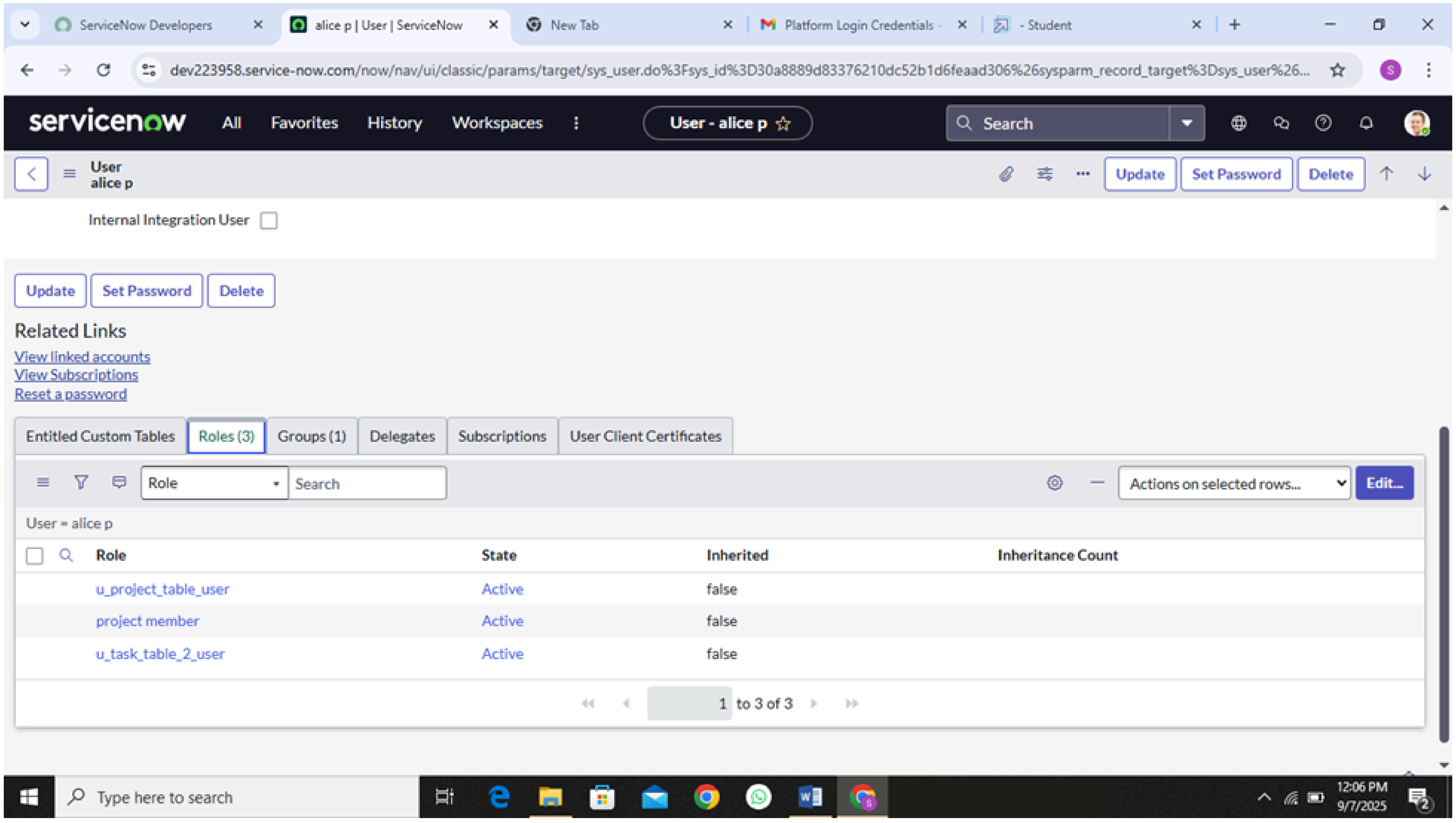
4. Under project manager

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



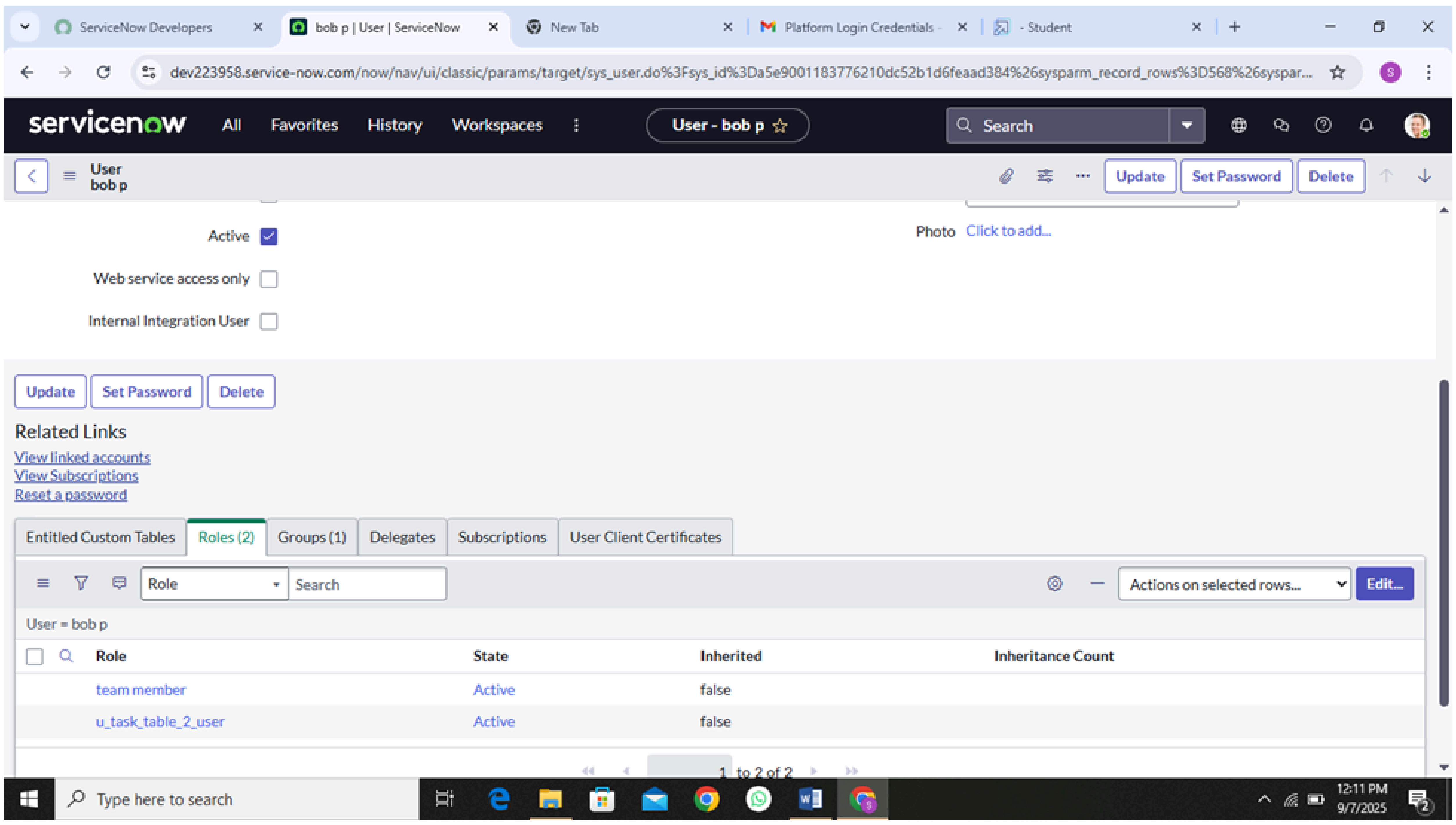
Activity 2: Assign roles to bob user

1. Open Service Now. 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

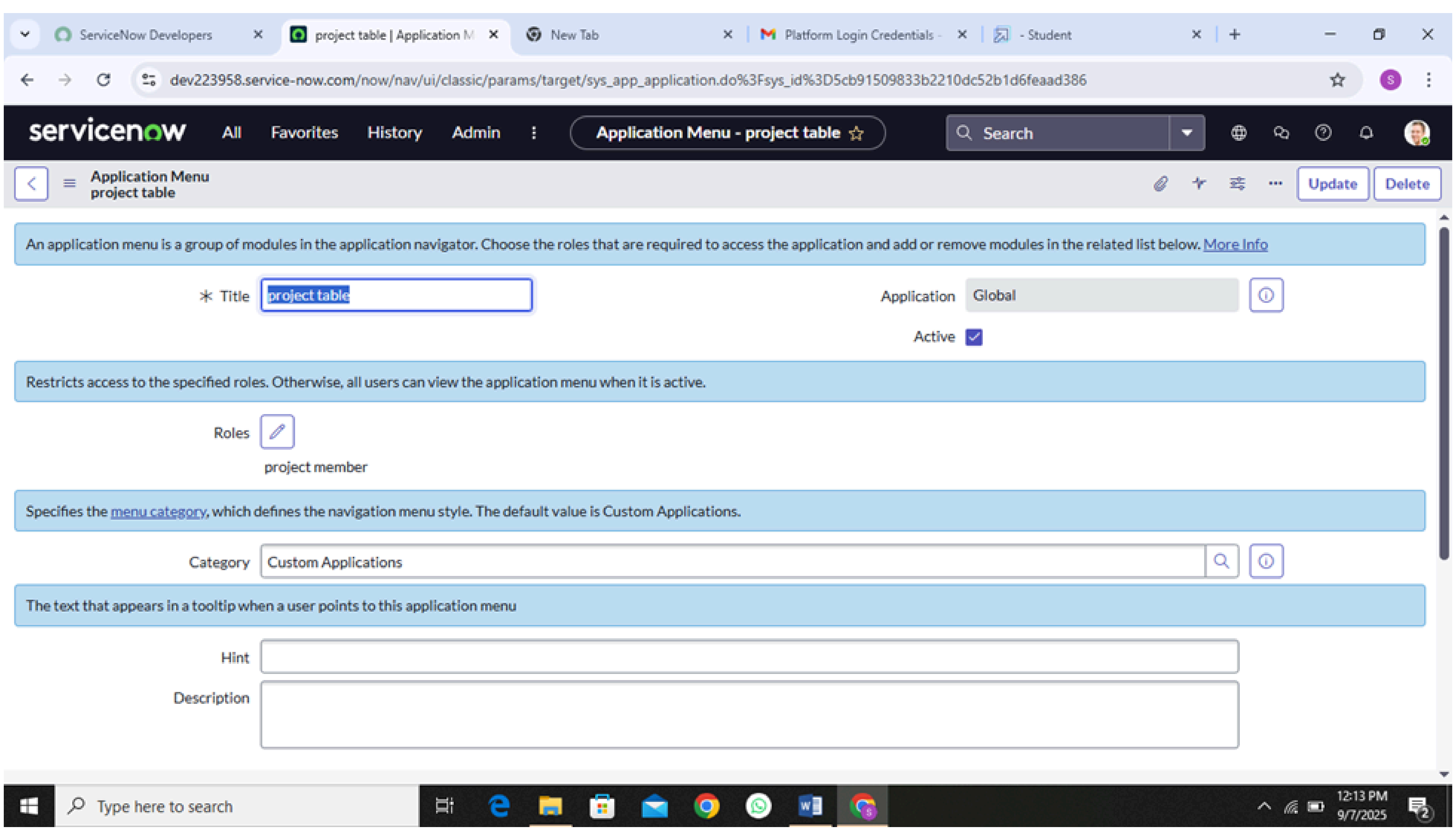
2. Go to application navigator search for search project table application

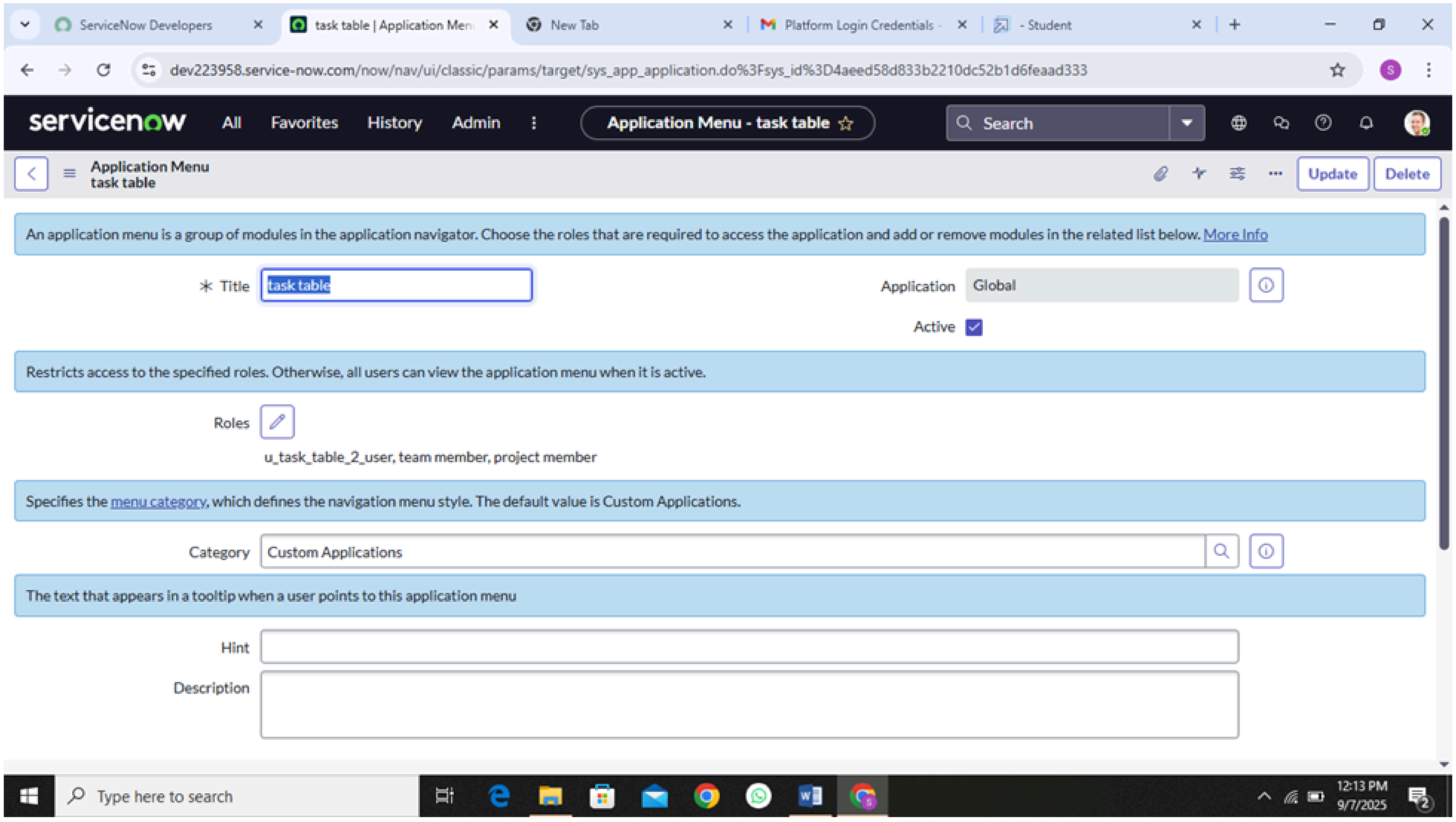
3. Click on edit module

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





Milestone 8: Access control list

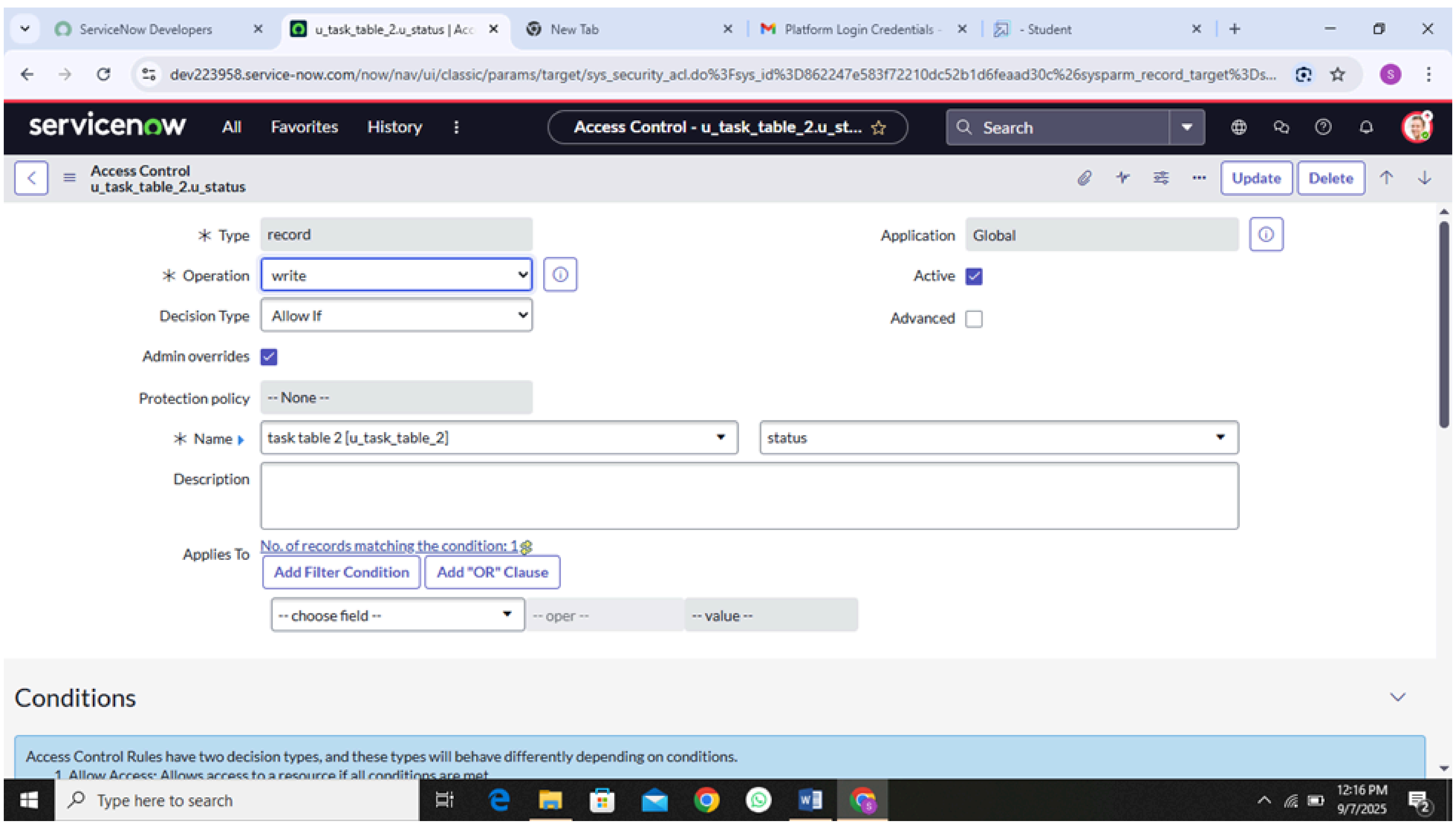
Activity 1: Create ACL

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

6. Fill the following details to create a new ACL

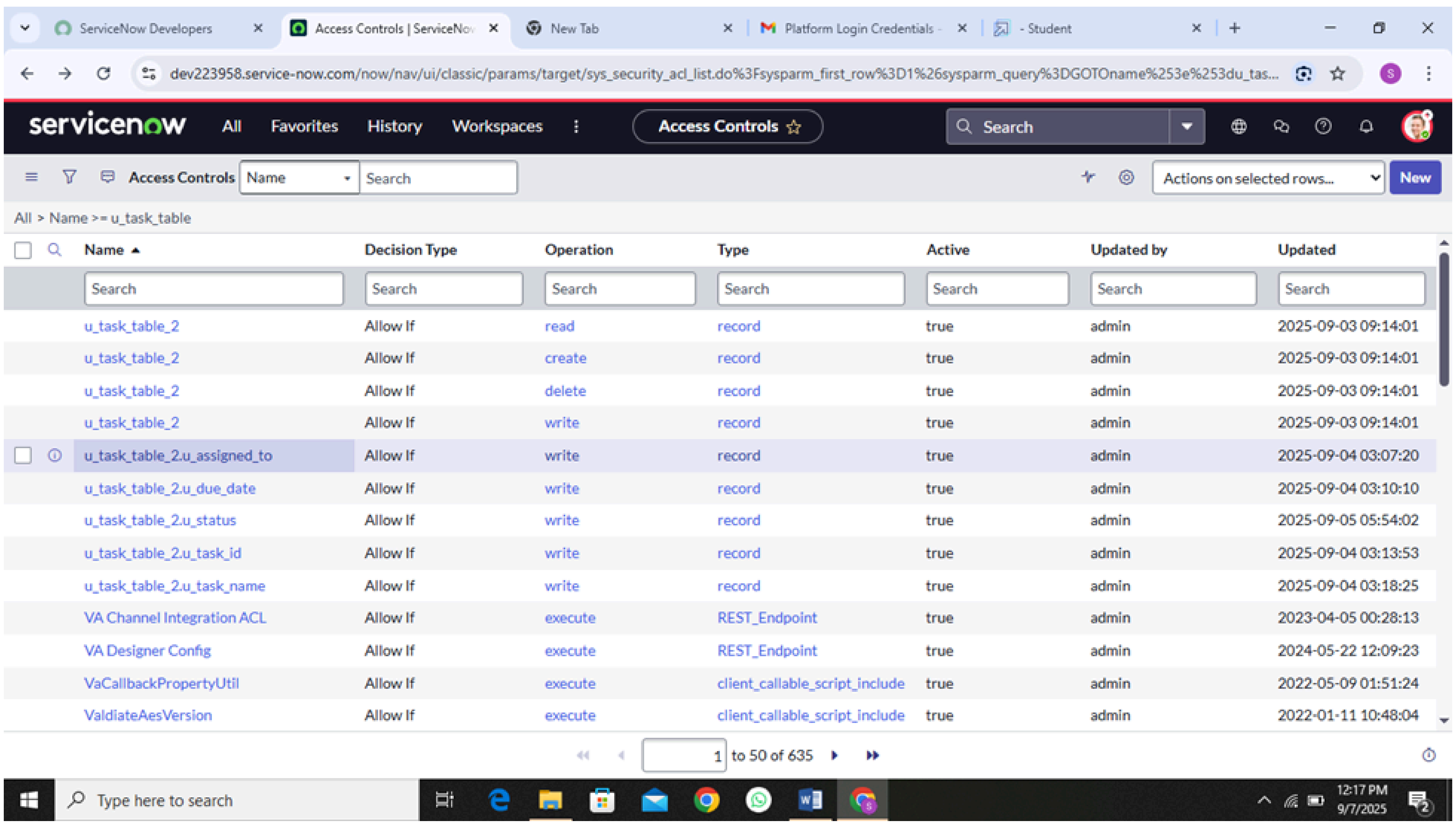


7. Scroll down under requires role

8. Double click on insert a new row

9. Give task table and team member role

10. Click on submit
11. Similarly create 4 acl for the following fields

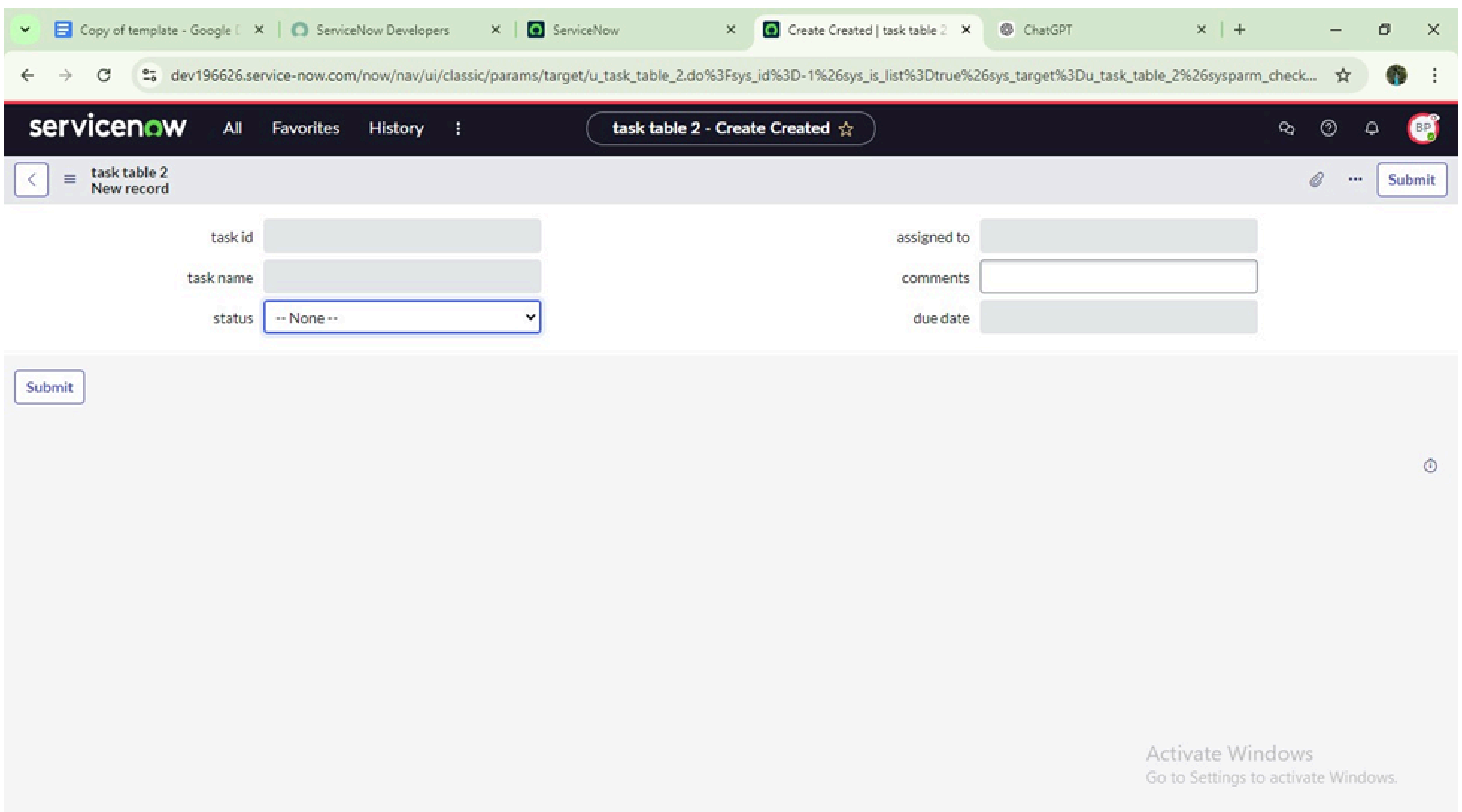


Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_task_table_2	Allow If	read	record	true	admin	2025-09-03 09:14:01
u_task_table_2	Allow If	create	record	true	admin	2025-09-03 09:14:01
u_task_table_2	Allow If	delete	record	true	admin	2025-09-03 09:14:01
u_task_table_2	Allow If	write	record	true	admin	2025-09-03 09:14:01
u_task_table_2.u_assigned_to	Allow If	write	record	true	admin	2025-09-04 03:07:20
u_task_table_2.u_due_date	Allow If	write	record	true	admin	2025-09-04 03:10:10
u_task_table_2.u_status	Allow If	write	record	true	admin	2025-09-05 05:54:02
u_task_table_2.u_task_id	Allow If	write	record	true	admin	2025-09-04 03:13:53
u_task_table_2.u_task_name	Allow If	write	record	true	admin	2025-09-04 03:18:25
VA Channel Integration ACL	Allow If	execute	REST_Endpoint	true	admin	2023-04-05 00:28:13
VA Designer Config	Allow If	execute	REST_Endpoint	true	admin	2024-05-22 12:09:23
VaCallbackPropertyUtil	Allow If	execute	client_callable_script_include	true	admin	2022-05-09 01:51:24
ValdiateAesVersion	Allow If	execute	client_callable_script_include	true	admin	2022-01-11 10:48:04

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

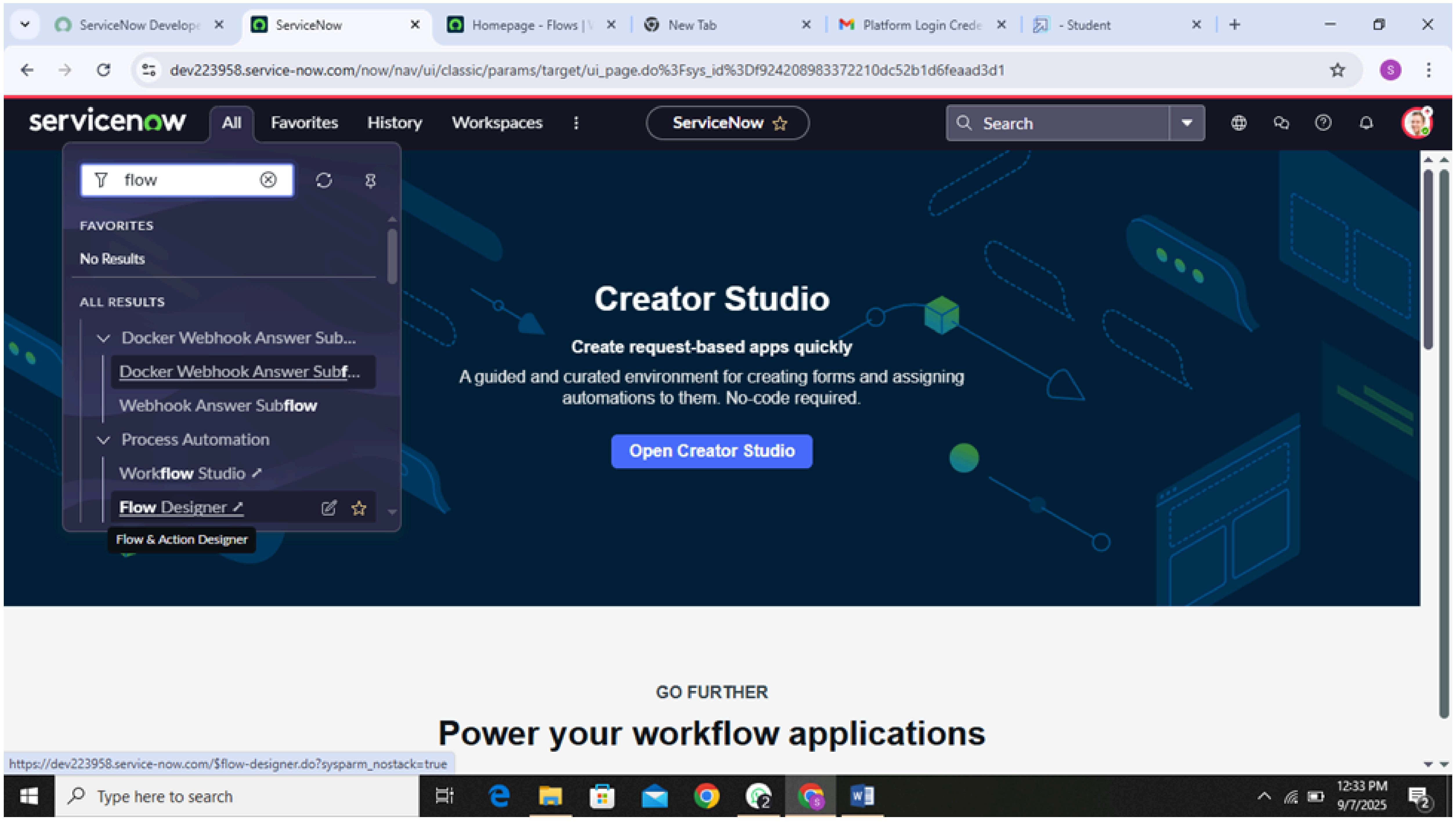
16. Comment and status fields are have the edit access



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.


ServiceNow Develop
ServiceNow
Homepage - Flows
New Tab
Platform Login Crede
- Student
dev223958.service-now.com/now/nav/ui/classic/params/target/ui_page.do%3Fsys_id%3Df924208983372210dc52b1d6feaad3d1
servicenow
All
Favorites
History
Workspaces
ServiceNow
Search
flow
FAVORITES
No Results
ALL RESULTS
Docker Webhook Answer Sub...
Docker Webhook Answer Subf...
Webhook Answer Subflow
Process Automation
Workflow Studio
Flow Designer
Flow & Action Designer
Creator Studio
Create request-based apps quickly
A guided and curated environment for creating forms and assigning automations to them. No-code required.
Open Creator Studio
GO FURTHER
Power your workflow applications
https://dev223958.service-now.com/$flow-designer.do?sysparm_nostack=true
Type here to search
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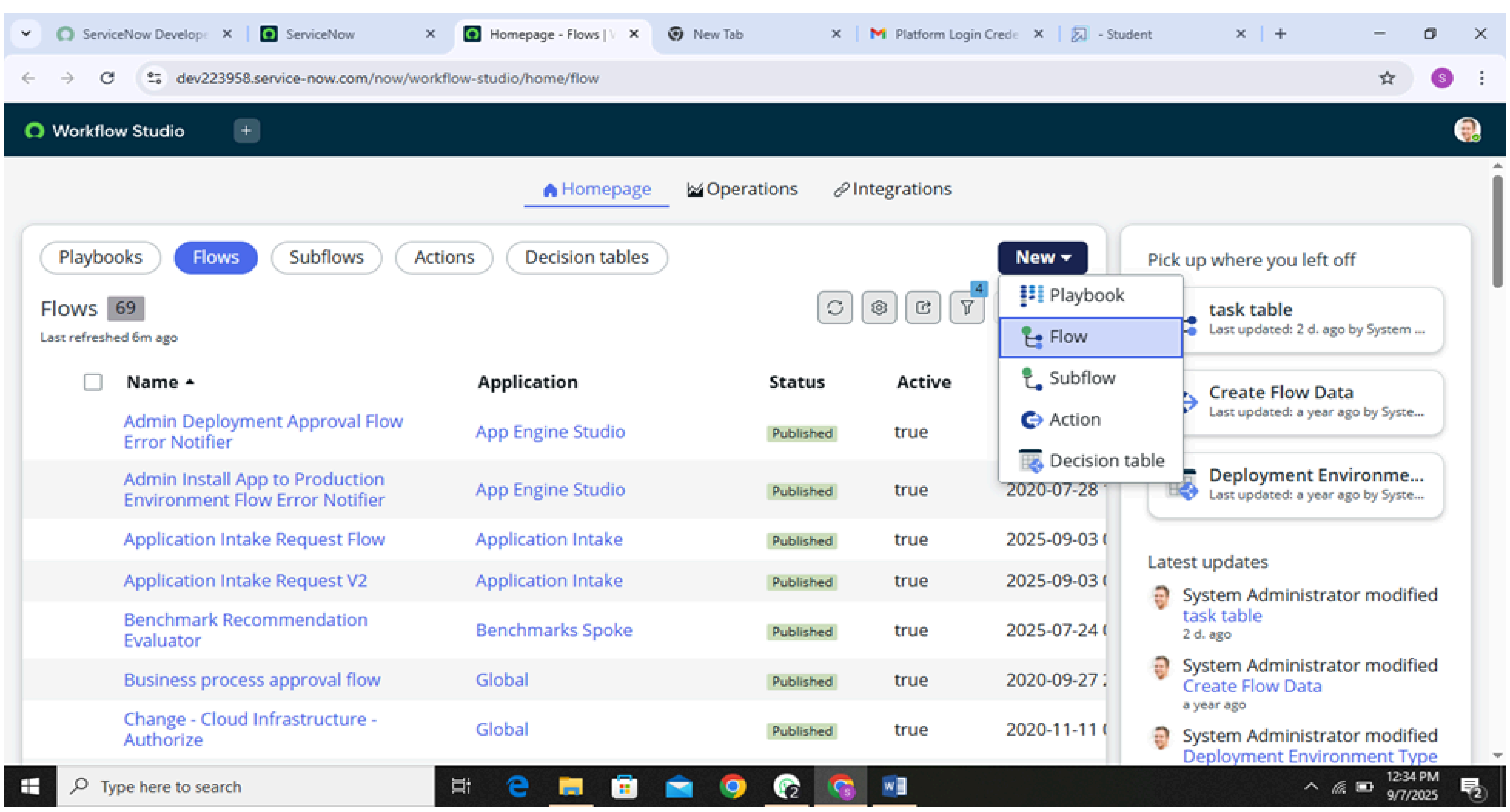
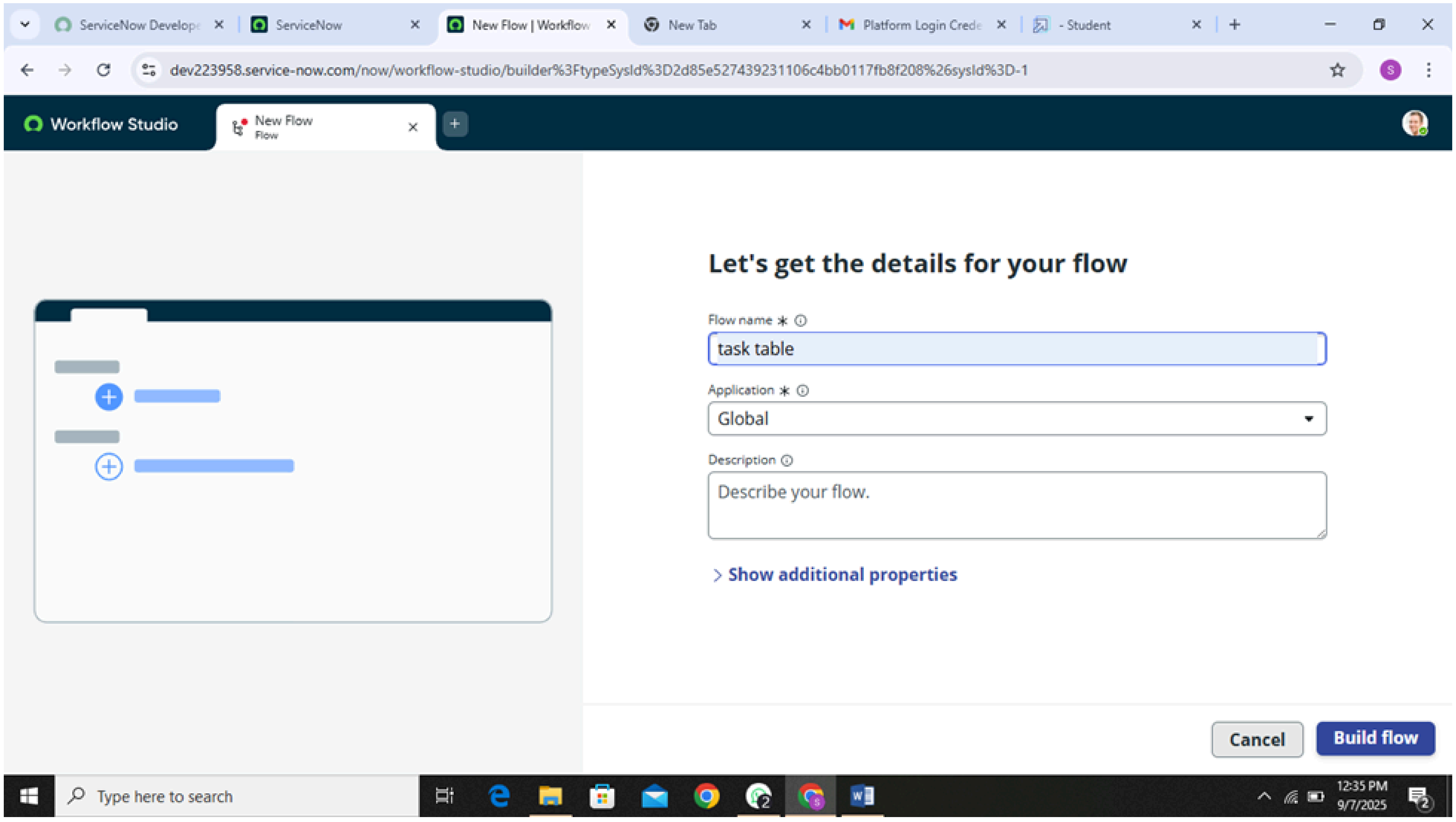
9/7/2025


ServiceNow Develop
ServiceNow
Homepage - Flows
New Tab
Platform Login Crede
- Student
dev223958.service-now.com/now/workflow-studio/home/flow
Workflow Studio
Homepage
Operations
Integrations
Playbooks
Flows
Subflows
Actions
Decision tables
New
Flows 69
Last refreshed 6m ago
Name
Application
Status
Active
Playbook
Flow
Subflow
Action
Decision table
Admin Deployment Approval Flow Error Notifier
App Engine Studio
Published
true
Admin Install App to Production Environment Flow Error Notifier
App Engine Studio
Published
true
2020-07-28
Application Intake Request Flow
Application Intake
Published
true
2025-09-03
Application Intake Request V2
Application Intake
Published
true
2025-09-03
Benchmark Recommendation Evaluator
Benchmarks Spoke
Published
true
2025-07-24
Business process approval flow
Global
Published
true
2020-09-27
Change - Cloud Infrastructure - Authorize
Global
Published
true
2020-11-11
Pick up where you left off
task table
Last updated: 2 d. ago by System ...
Create Flow Data
Last updated: a year ago by Syste...
Deployment Environme...
Last updated: a year ago by Syste...
Latest updates
System Administrator modified
task table
2 d. ago
System Administrator modified
Create Flow Data
a year ago
System Administrator modified
Deployment Environment Type
Type here to search
12:34 PM
9/7/2025



Next step:

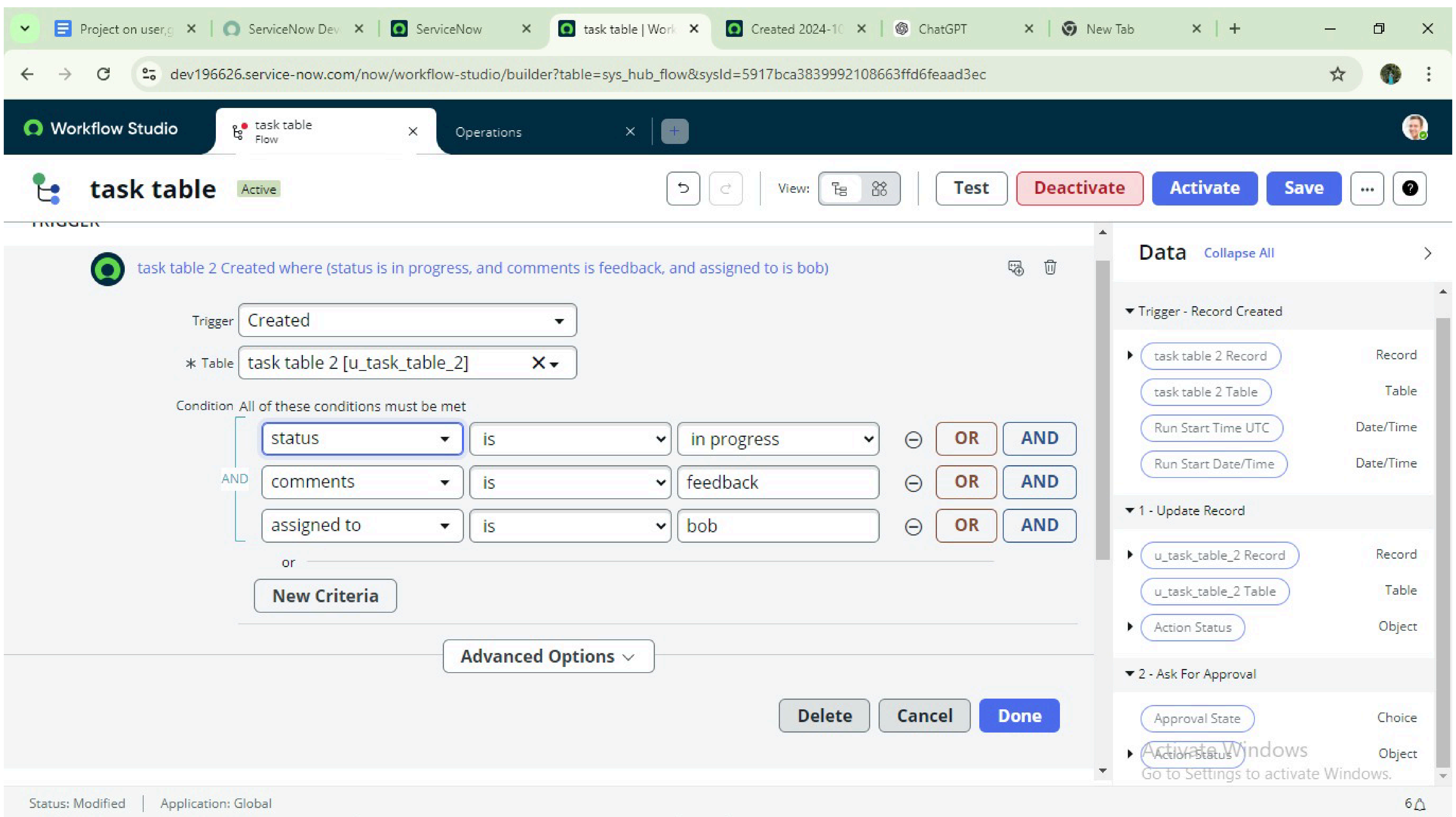
1. Click on Add a trigger
2. Select the trigger in that Search for "create record" and select that.
3. Give the table name as "task table" .
4. Give the Condition as

   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.

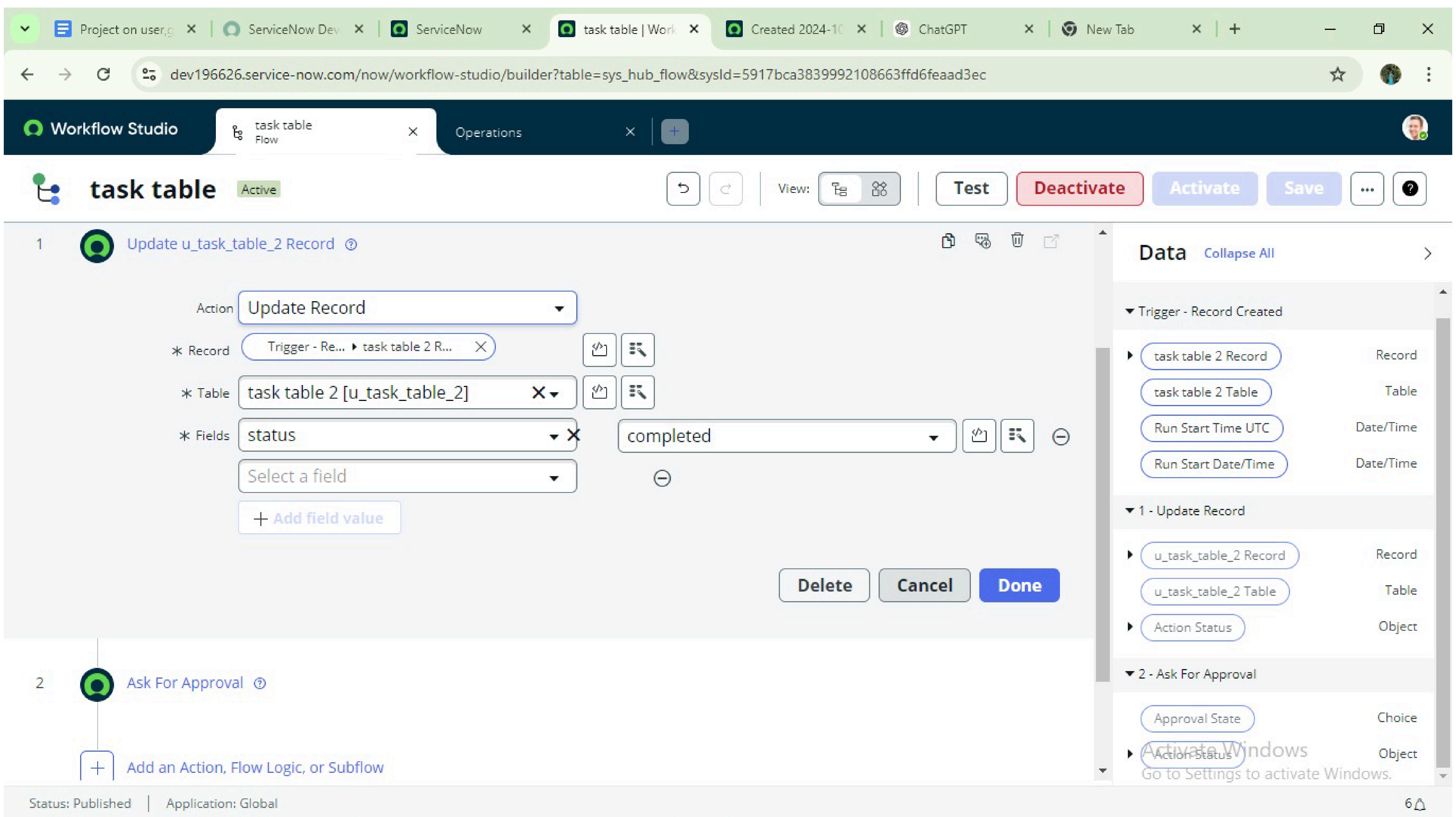
2. Select action in that, search for “update records” .

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"

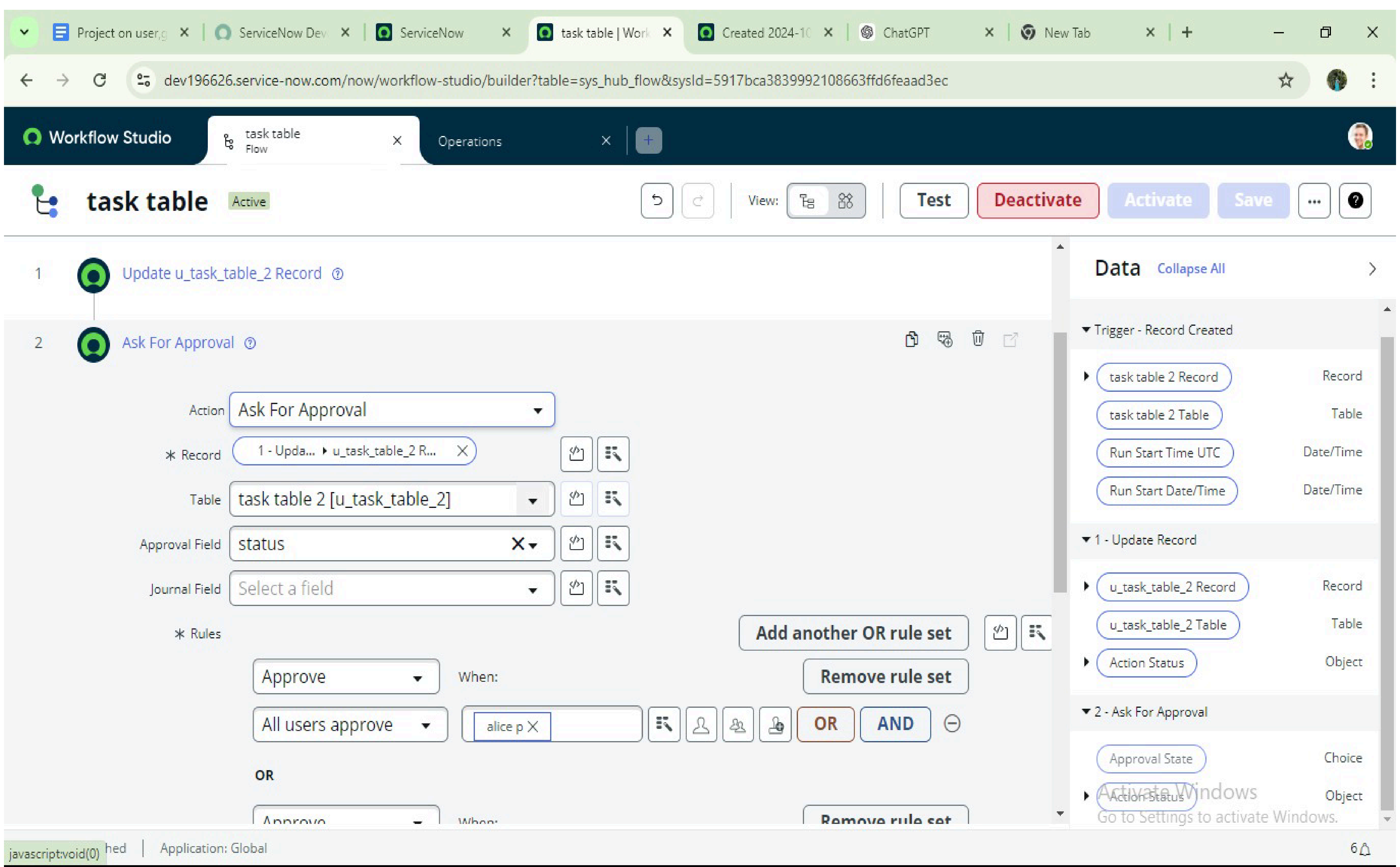
6. Click on Done.



Next step:

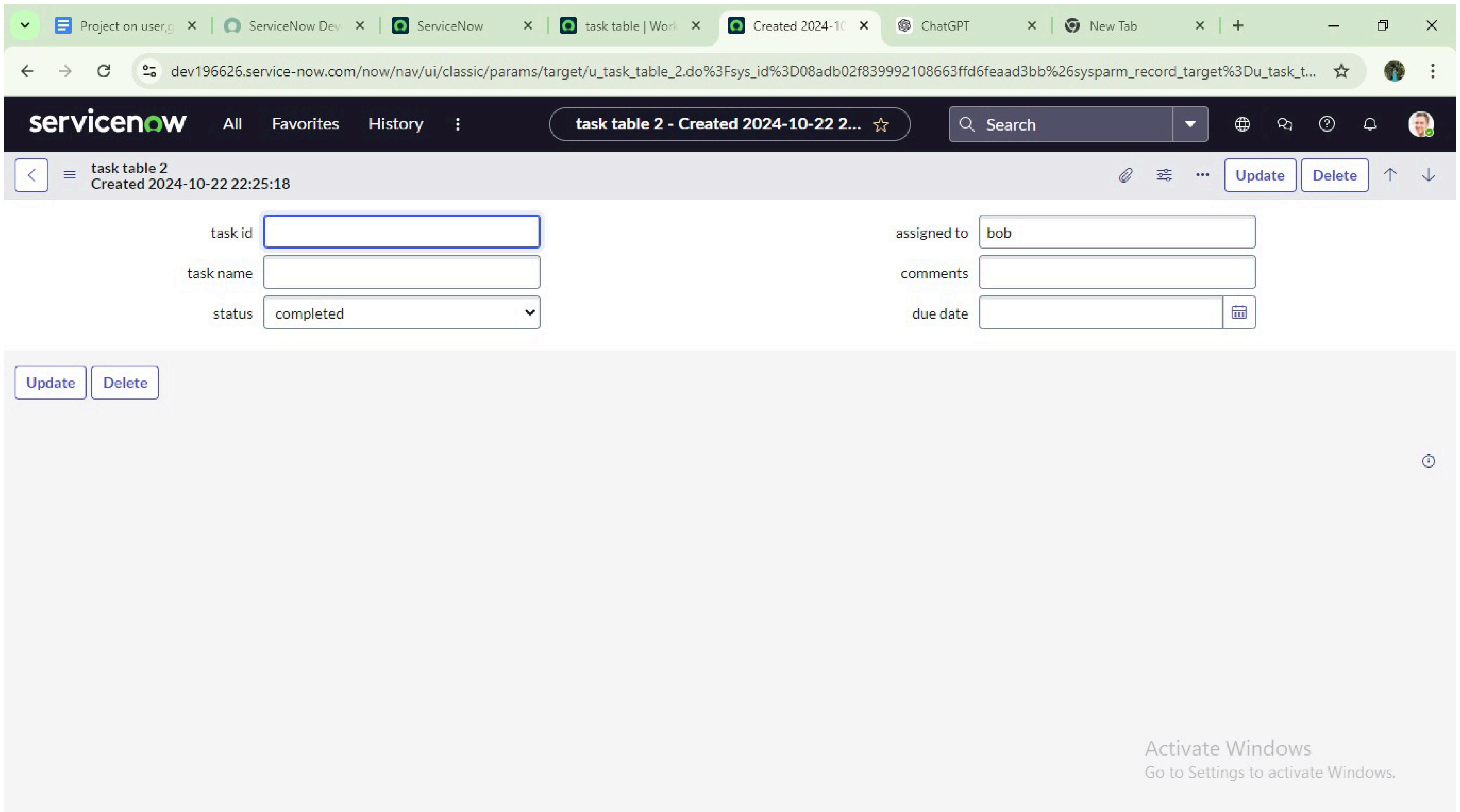
1. Now under Actions.
2. Click on Add an action.
3. Select action in that, search for "ask for approval" .

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.

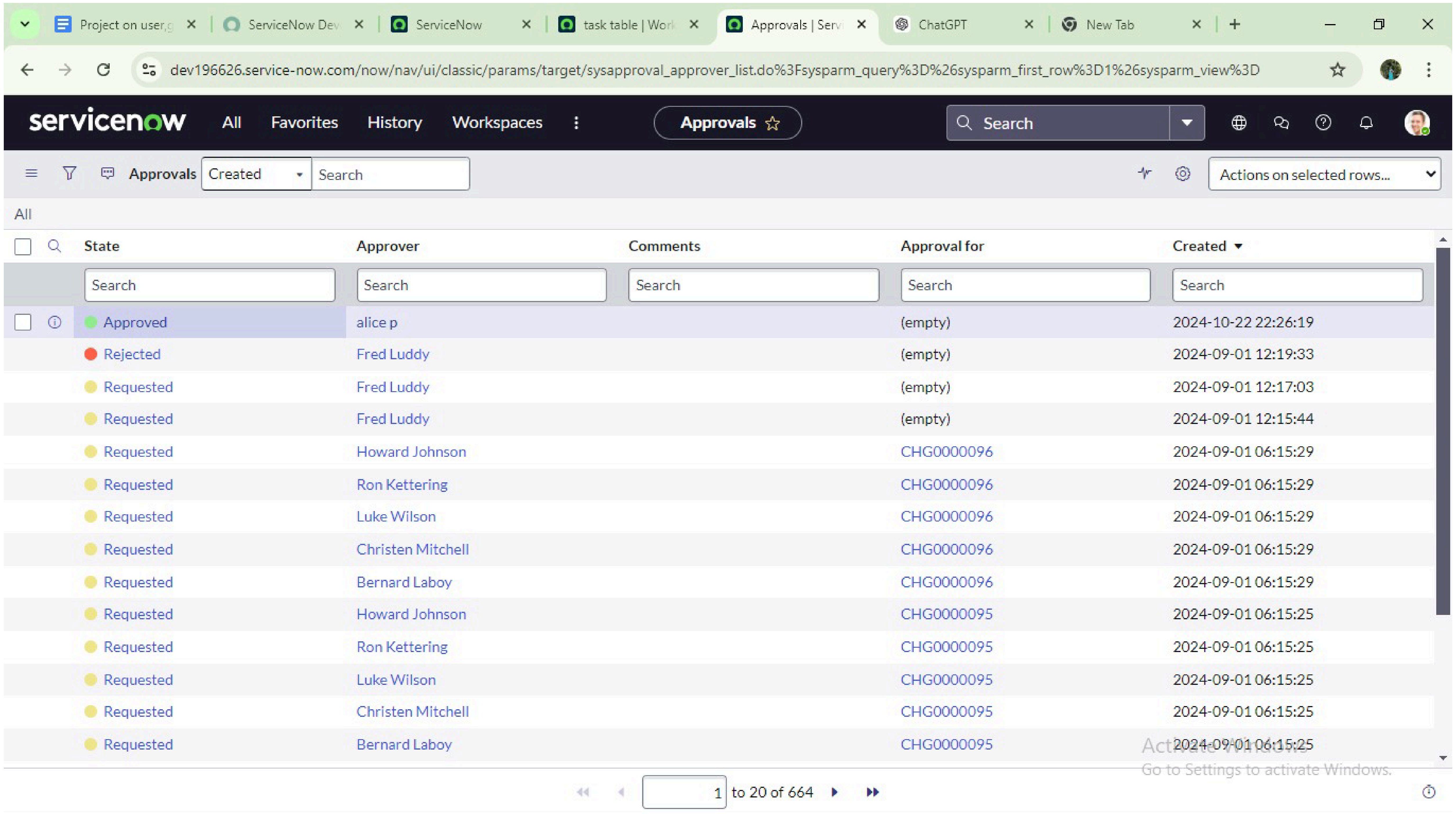
10. It status field is updated to completed



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



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

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.