

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

1. Creating User

Alice p:

The screenshot displays the ServiceNow user management interface for a user named 'alice p'. The interface is divided into several sections:

- Header:** Includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces, Admin), a search bar, and user profile information (User - alice p).
- Form Fields:**
 - User ID:** Text input field containing 'alice'.
 - First name:** Text input field containing 'alice'.
 - Last name:** Text input field containing 'p'.
 - Title:** Text input field with a location pin icon.
 - Department:** Text input field with a search icon.
 - Email:** Text input field containing 'alice@gmail.com' with an email icon.
 - Language:** Dropdown menu set to '-- None --'.
 - Calendar integration:** Dropdown menu set to 'Outlook'.
 - Time zone:** Dropdown menu set to 'System (America/Los_Angeles)'.
 - Date format:** Dropdown menu set to 'System (yyyy-MM-dd)'.
 - Business phone:** Text input field.
 - Mobile phone:** Text input field.
 - Photo:** Link to 'Click to add...'.
- Checkboxes:**
 - Password needs reset:** ☐
 - Locked out:** ☐
 - Active:** ☒
 - Web service access only:** ☐
 - Internal Integration User:** ☐
- Buttons:** 'Update', 'Set Password', and 'Delete' buttons are located at the top right and bottom left of the form area.
- Related Links:** A section with links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'.
- Footer:** Includes a tabbed interface for 'Entitled Custom Tables', 'Roles', 'Groups (1)', 'Delegates', 'Subscriptions', and 'User Client Certificates'. A message states 'No templates are available' with a link to 'Create A New One?'.

- **Bob User:**

The screenshot shows the ServiceNow user management interface for a user named 'Bob p'. The page is titled 'User - Bob p' and includes a search bar and navigation tabs (All, Favorites, History, Workspaces, Admin). The user profile is displayed with the following details:

- User ID:** bob
- First name:** Bob
- Last name:** p
- Title:** (empty)
- Department:** (empty)
- Email:** bob@gmail.com
- Language:** -- None --
- Calendar integration:** Outlook
- Time zone:** System (America/Los Angeles)
- Date format:** System (yyyy-MM-dd)
- Business phone:** (empty)
- Mobile phone:** (empty)
- Photo:** Click to add...

Below the profile information, there are several checkboxes for user status and access:

- Password needs reset:** ☐
- Locked out:** ☐
- Active:** ☒
- Web service access only:** ☐
- Internal Integration User:** ☐

At the bottom of the page, there are buttons for 'Update', 'Set Password', and 'Delete'. Below these buttons, there is a 'Related Links' section with links to 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the very bottom, there is a tabbed interface for 'Entitled Custom Tables', 'Roles', 'Groups (1)', 'Delegates', 'Subscriptions', and 'User Client Certificates'. The 'Groups (1)' tab is currently selected, and it shows 'No templates are available' with a link to 'Create A New One?'.

2. Creating Groups:

servicenow All Favorites History Workspaces Admin Group - project team ☆ Search

< Group project team Update Delete

① Job to add or remove role(s) from user(s) of group has been queued

Name project team Group email Group email
Manager Manager Parent Parent
Description

Update Delete

Roles Group Members (2) Groups

≡ User Search Actions on selected rows... New Edit...

Group = project team

☐ User

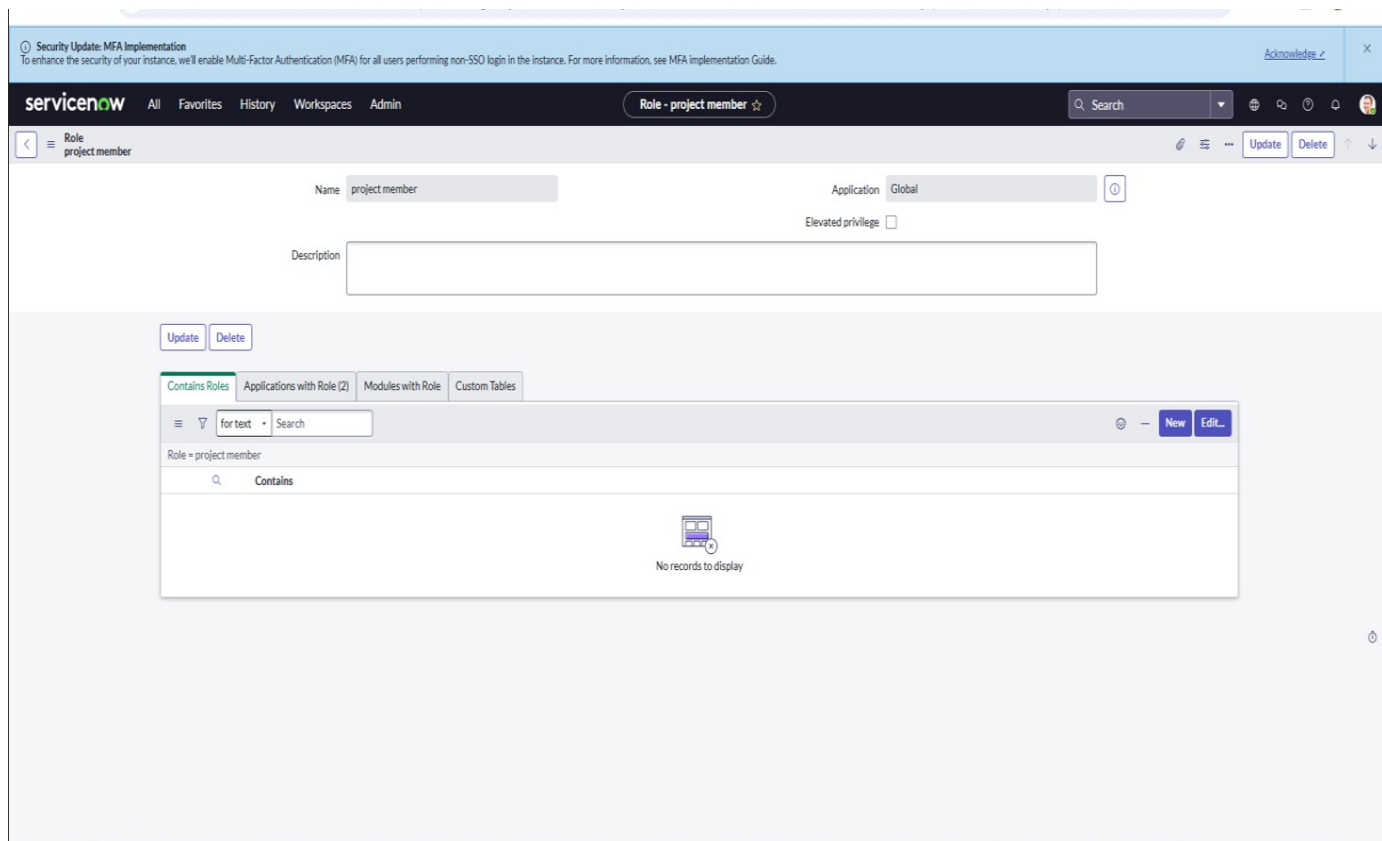
Bob p
alice p

1 to 2 of 2

No templates are available [Create A New One?](#)

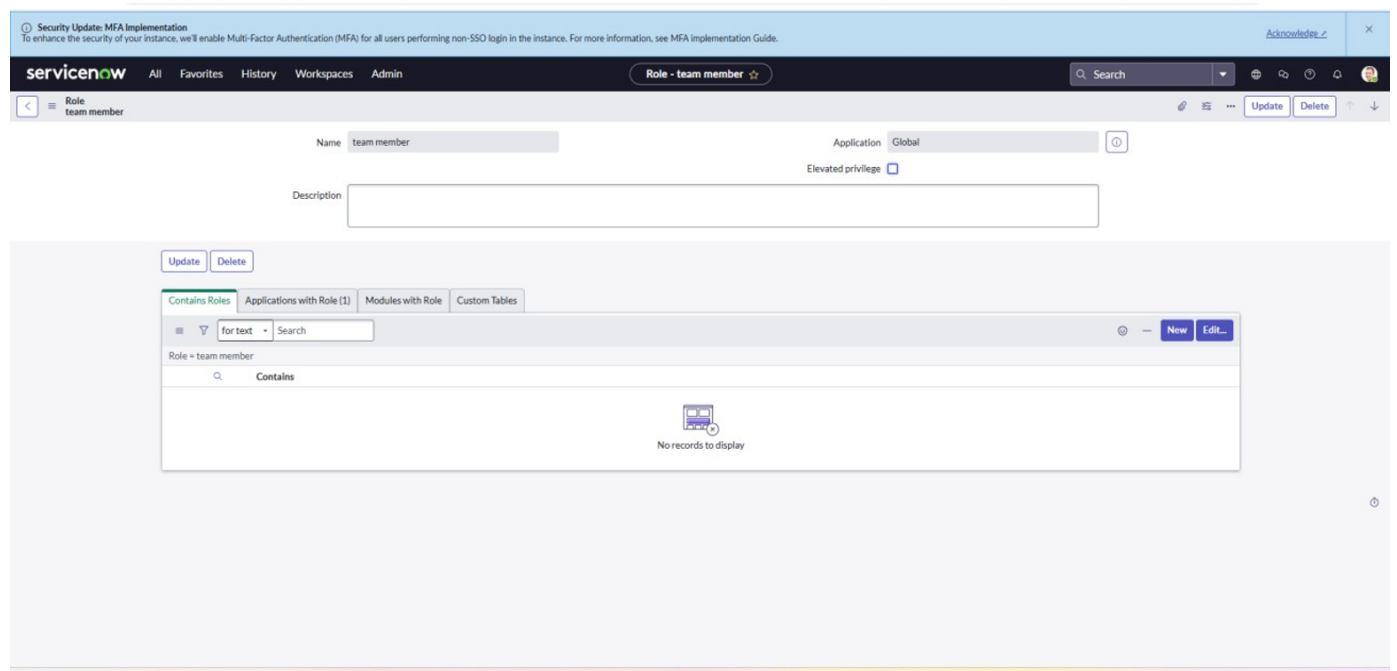
3. Creating Roles

Project member:



- **Creating one more role**

Team member:



4. Creating tables

- **Project table:**

servicenow

AllFavoritesHistoryWorkspacesAdmin

Group - project team

Search

<

≡

Group
project team

Update

Delete

① Job to add or remove role(s) from user(s) of group has been queued

x

Name

project team

Group email

Manager

Parent

Description

Update

Delete

Roles

Group Members (2)

Groups

≡

▽

User

Search

⚙

—

Actions on selected rows...

▼

New

Edit...

Group = project team

☐

Q

User

▼

Bob

p

alice

p

«

◀

1 to 2 of 2

▶

»

No templates are available

Create A New One?

6. Assigning Roles to Users

- Alice:

servicenow

AllFavoritesHistoryWorkspacesAdmin

User - alice p

Search

UpdateSet PasswordDelete

User IDalice

First namealice

Last namep

Title

Department

Password needs reset

Locked out

Active

Web service access only

Internal Integration User

Emailalice@gmail.com

Language-- None --

Calendar integrationOutlook

Time zoneSystem (America/Los Angeles)

Date formatSystem (yyyy-MM-dd)

Business phone

Mobile phone

PhotoClick to add...

UpdateSet PasswordDelete

Related Links

[View linked accounts](#)

[View Subscriptions](#)

[Reset a password](#)

Entitled Custom TablesRoles (3)GroupsDelegatesSubscriptionsUser Client Certificates

RoleSearch

Actions on selected rows...Edit...

User - alice p

Role	State	Inherited	Inheritance Count
u_u_project_table_user	Active	false	
u_task_table_2_user	Active	false	
project member	Active	false	

- **Bob User:**

servicenow

AllFavoritesHistoryWorkspacesAdmin

User - Bob p

Search

UserBob p

UpdateSet PasswordDelete

User ID

bob

First name

Bob

Last name

p

Title

Department

Password needs reset

Locked out

Active

Web service access only

Internal Integration User

Email

bob@gmail.com

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...

UpdateSet PasswordDelete

Related Links

View linked accounts

View Subscriptions

Reset a password

Entitled Custom Tables

Roles (2)

Groups

Delegates

Subscriptions

User Client Certificates

Role

Search

Actions on selected rows...

Edit...

User - Bob p

Role	State	Inherited	Inheritance Count
u_task_table_2_user	Active	false	
team member	Active	false	

1 to 2 of 2

7.Assigning Table Access to Application

- Project table:

servicenow

AllFavoritesHistoryWorkspacesAdmin

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](#)

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

UpdateDelete

Modules

Order

Search

Actions on selected rows...

New

Application menu - project table

Title	Table	Active	Filter	Order	Link type	Device type	Roles	Updated
u_project_tables	Project Table [u_project_table]	true			List of Records		u_u_project_table_user	2025-06-22 00:19:22

1 to 1 of 1

- Task table 2:

- **Creating ACL:**

The screenshot shows the 'Access Control - New Record' form in the ServiceNow interface. The top navigation bar includes the ServiceNow logo, 'All', 'Favorites', 'History', 'Admin', and a search bar. The breadcrumb trail shows 'Access Control' > 'New record'. A warning message at the top states: 'Warning: A role, security attribute, data condition, or script is required to properly secure access with this ACL.' The form fields are as follows:

- * Type: record (dropdown)
- * Operation: write (dropdown)
- Decision Type: Allow If (dropdown)
- Application: Global (dropdown)
- Active: ☒
- Advanced: ☐
- Admin overrides: ☒
- Protection policy: -- None -- (dropdown)
- * Name: task table 2 [u_task_table_2] (dropdown)
- status (dropdown)
- Description: (text area)
- Applies To: [No. of records matching the condition: 1](#)
- Buttons: Add Filter Condition, Add "OR" Clause
- Footer: -- choose field -- (dropdown), -- oper -- (dropdown), -- value -- (dropdown)

- **Assigning ACL Bob user:**

Task table 2:

servicenow

AllFavoritesHistory

task table 2 - Create Created

BP

<

task table 2
New record

...

Submit

task id

assigned to

task name

comments

status

-- None --

due date

Submit

9.Creating Flow:

- Adding a Trigger

Workflow Studio task table Flow • Global

task table Active

View: Test Debug Deactivate Activate Save

TRIGGER

task table 2 Created where (status is in progress, and comments is feedback, and assigned is bob)

Trigger Created

* Table task table 2 [u_task_table_2]

Condition All of these conditions must be met

AND

status is []

OR AND

comments is feedback

OR AND

assigned is bob

OR

New Criteria

Advanced Options

Delete Cancel Done

Data Collapse All

Flow Variables

Trigger - Record Created

task table 2 Record Record

task table 2 Table Table

Run Start Time UTC Date/Time

Run Start Date/Time Date/Time

1 - Update Record

task table 2 Record Record

task table 2 Table Table

Action Status Object

2 - Ask For Approval

Approval State Choice

Action Status Object

- **Adding an Action:**

Workflow Studio task table Flow: None

task table Active

Test Debug Deactivate Activate Save

ACTIONS Select multiple

1 Update task table 2 Record

Action Properties

Action: Update Record

Action Inputs

* Record: Trigger - Re... task table 2 R... X

* Table: task table 2 [u_task_table_2] X

* Fields: status X Select a choice

+ Add field value

Delete Cancel Done

2 Ask For Approval

Status: Published Application: Global

Data Collapse All

Flow Variables

Trigger - Record Created

task table 2 Record Record

task table 2 Table Table

Run Start Time UTC Date/Time

Run Start Date/Time Date/Time

1 - Update Record

task table 2 Record Record

task table 2 Table Table

Action Status Object

2 - Ask For Approval

Approval State Choice

Action Status Object

- Asking for Approval:

Workflow Studio

task table
Flow • None

X

+

task table
k1.e

V1<v<!g 8&

Test

Debug

Deactivate

Activate

Save

...

?

Action Properties

Ask For Approval

Action Inputs

* Record Trigger-Re- ▶ tas1:table2R.. X

Table(tasktable2[u_task_table_2]

ApprOY Reason

Appr<WalRe _status

JournalRe _Select a field

* Rules

[Approve

(Allusersapprove • J _[alicep

DueDate _None

Data Collapse/IT

flow Variables

Trigger- RecordCreated

tas1:table2Record
tasktable2Table
Record
Table

Run StartTimeUTC
Date/time

RunStart Date/Time
Date/time

1-UpdateRecord

tasktaWe2Record
tasktaWe2Table
Record
Table

A<tKlllItatus
Object

2-1.skf(Ap>prOYal

ApprovalState
Oloiee

A.ctiooStatus
Oliject