OPTIMIZINGUSER,GROUP,ANDROLEMANAGEMENT WITH ACCESS CONTROL AND WORKFLOWS

Team Id:NM2025TMID08799

Team Members:4

Team Leader: VINOTHA V

Team Member1: VIYASHINI J

Team Member 2: YUVARAJ M

Team Member3: AKASH J

ProblemContext:

In a smallproject environment, aProject Manager(Alice) and aTeamMember (Bob) areresponsible for deliveringtasks. However,theabsence ofwell-defined roles, access restrictions, and structured workflows often creates confusion in responsibilities, accountability, and progress monitoring.

Objectives:

1. RoleDefinition: ClearlyoutlinethedutiesofAliceasProject ManagerandBobasTeam Member, ensuring both responsibility and access boundaries are transparent.

2. AccessControl: Introducemechanismsthat limit Bob'sabilityto createoredit projects beyond hisassigned tasks, while stillallowing himto view and update hisresponsibilities.

3. WorkflowOrganization: Establishastructuredprocessthat enablesAliceto assignwork, track task progress, and oversee completion in a timely and efficient manner.

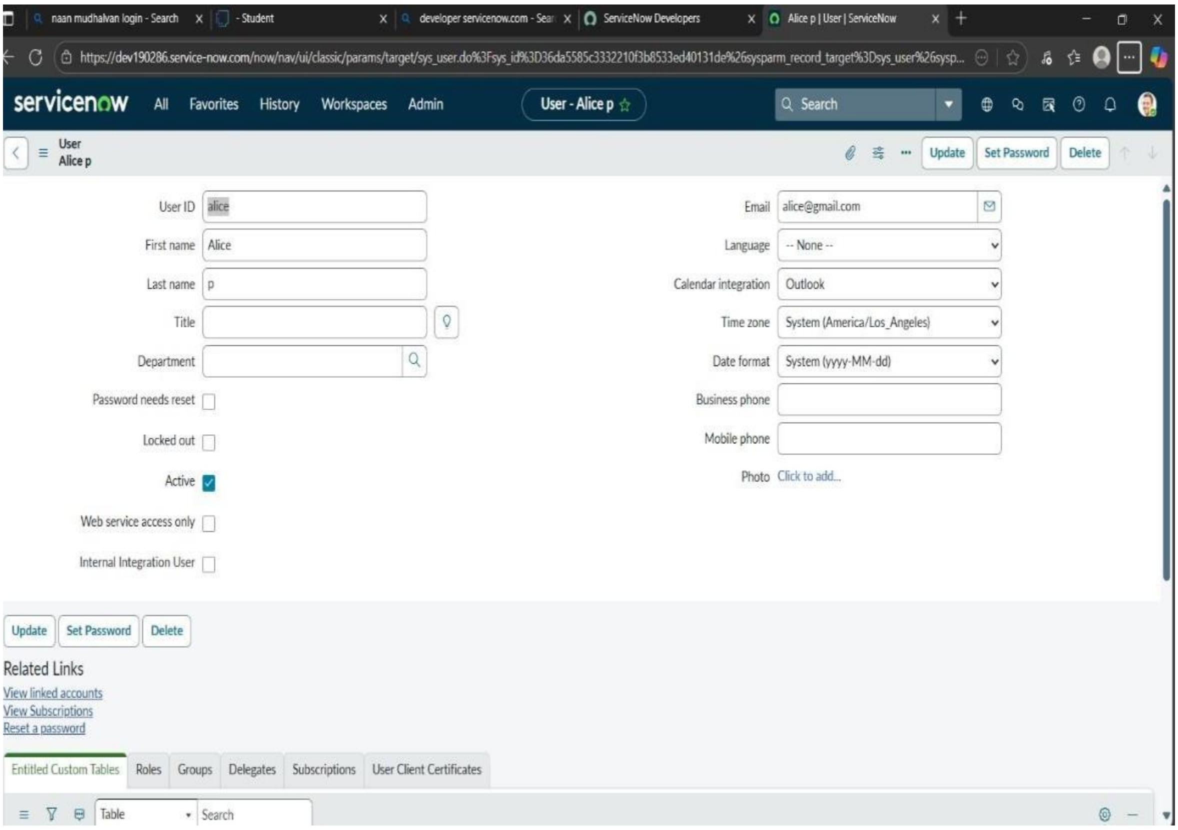
KeySkills/Tools: Users,Groups,Roles,Tables,AccessControlLists(ACL), Workflow/Flow Designer.

TASKINITIATION

Milestone1:Users

Activity1:CreateUsers

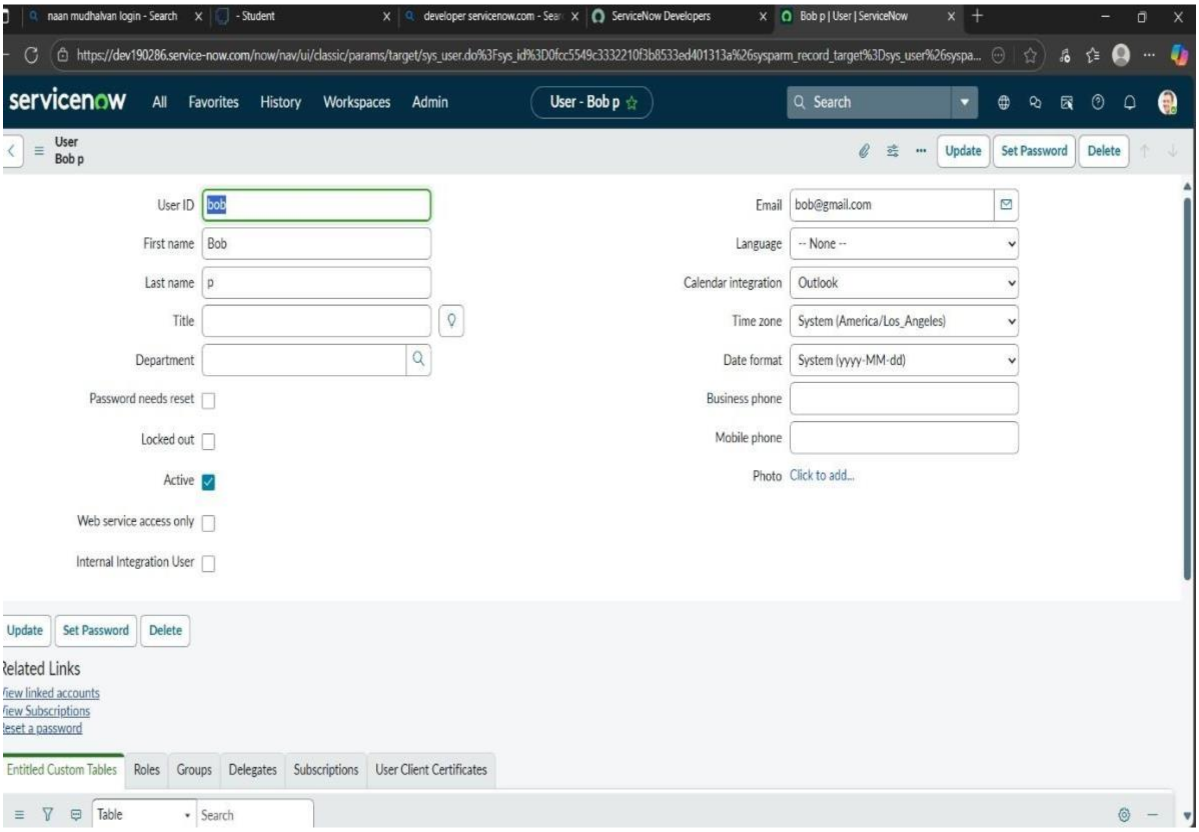
1. Openservicenow
2. ClickonAll>>search forusers
3. SelectUsersunder systemsecurity
4. Click onnew
5. Fillthefollowingdetailsto createanewuser
6. Click onsubmit



Createonemoreuser:

7. Createanotheruserwiththefollowingdetails

8. Click onsubmit



Milestone 2: Groups

Activity1:CreateGroups

1. Openservicenow.

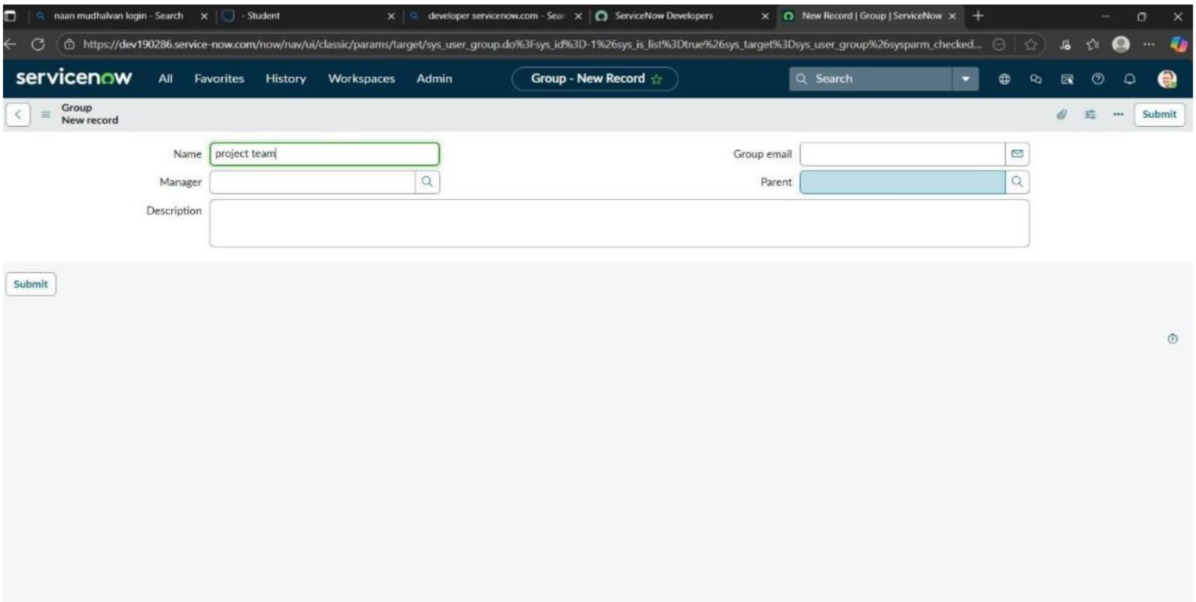
2. ClickonAll>>search forgroups

3. Selectgroupsundersystemsecurity

4. Click onnew

5. Fillthefollowingdetailsto createanewgroup

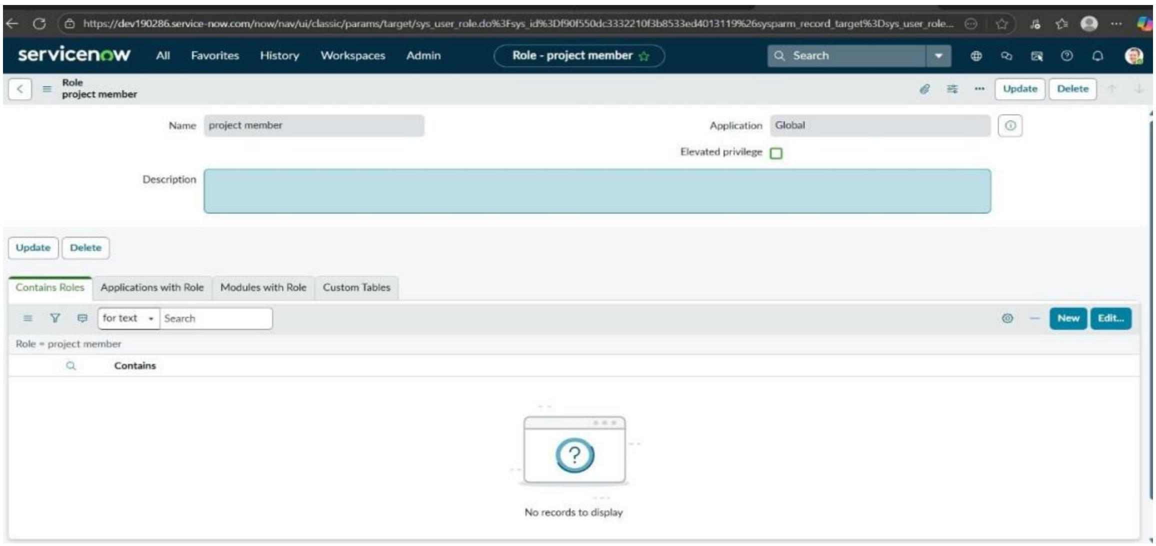
6. Click onsubmit.



Milestone 3: Roles

Activity1:Createroles

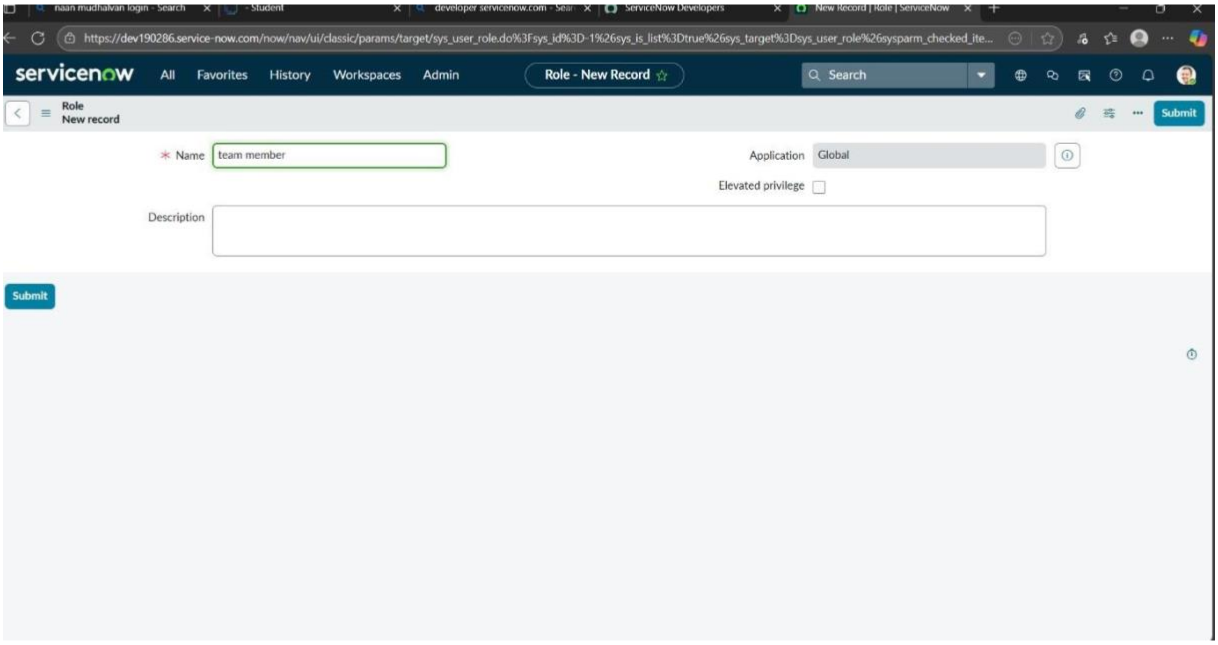
1. Openservicenow.
2. ClickonAll>>search forroles
3. Selectrolesundersystemsecurity
4. Click onnew
5. Fillthefollowingdetailstocreateanewrole
6. Click onsubmit.



Createonemorerole:

7. Createanotherrolewiththefollowingdetails

8. Click onsubmit



Milestone 4: Table

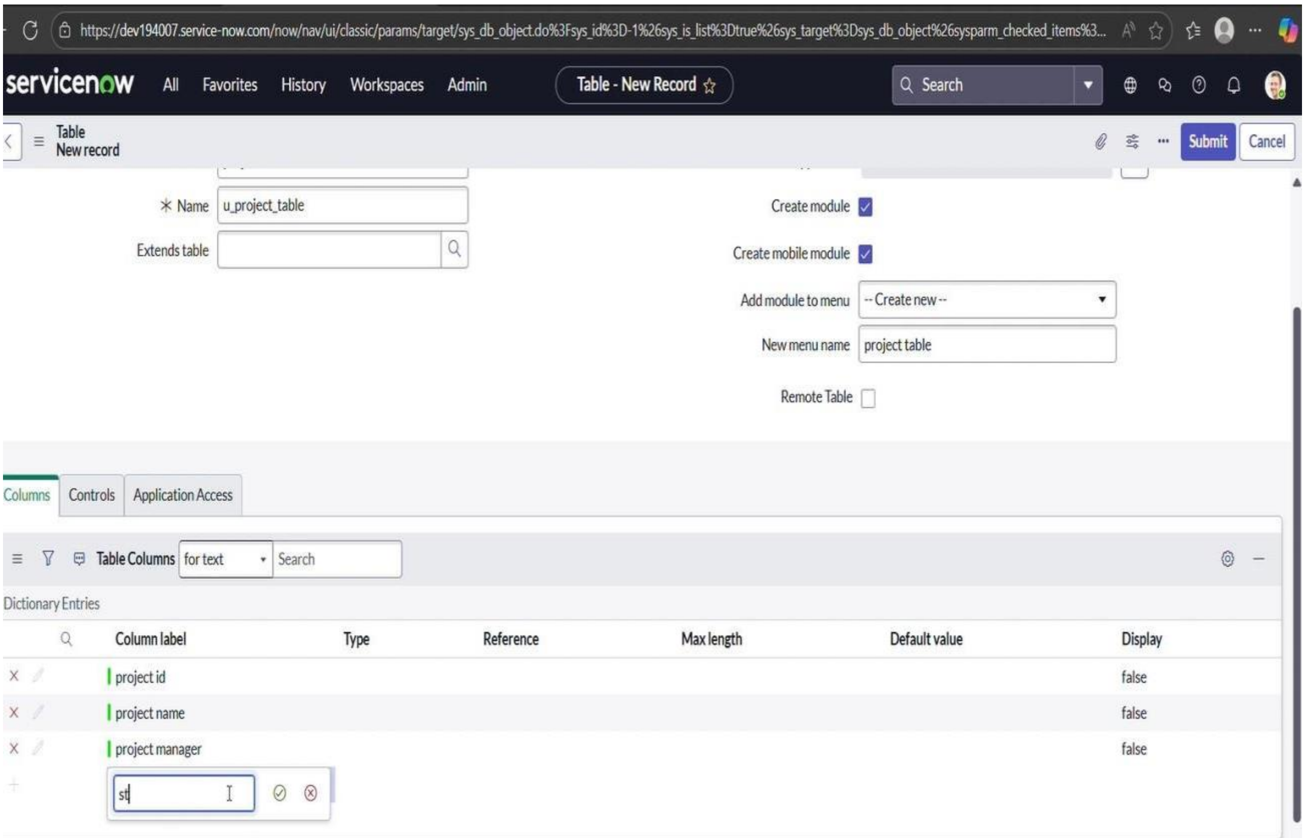
Activity1:CreateTable

1. Openservicenow.
2. ClickonAll>>search fortables
3. Selecttablesunder systemdefinition
4. Click onnew
5. Fillthefollowingdetailstocreateanewtable

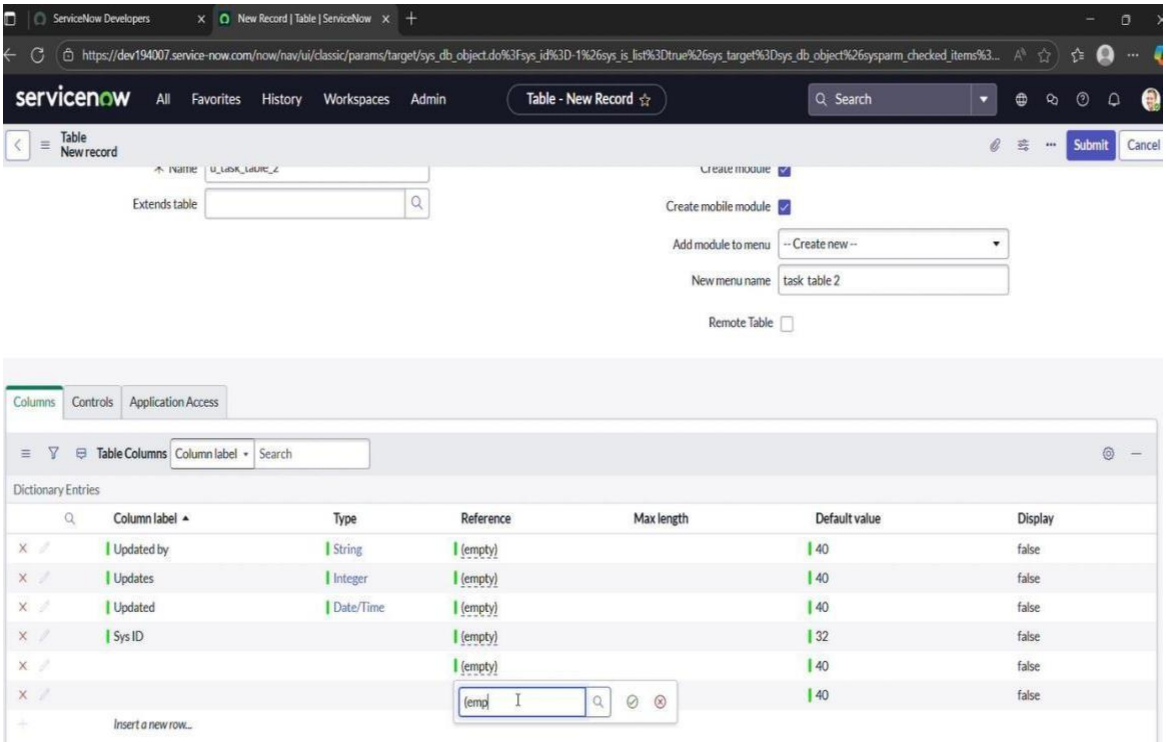
Label: project table

ChecktheboxesCreatemodule &Createmobilemodule

6. Undernew menuname:projecttable
7. Undertablecolumnsgivethecolumns



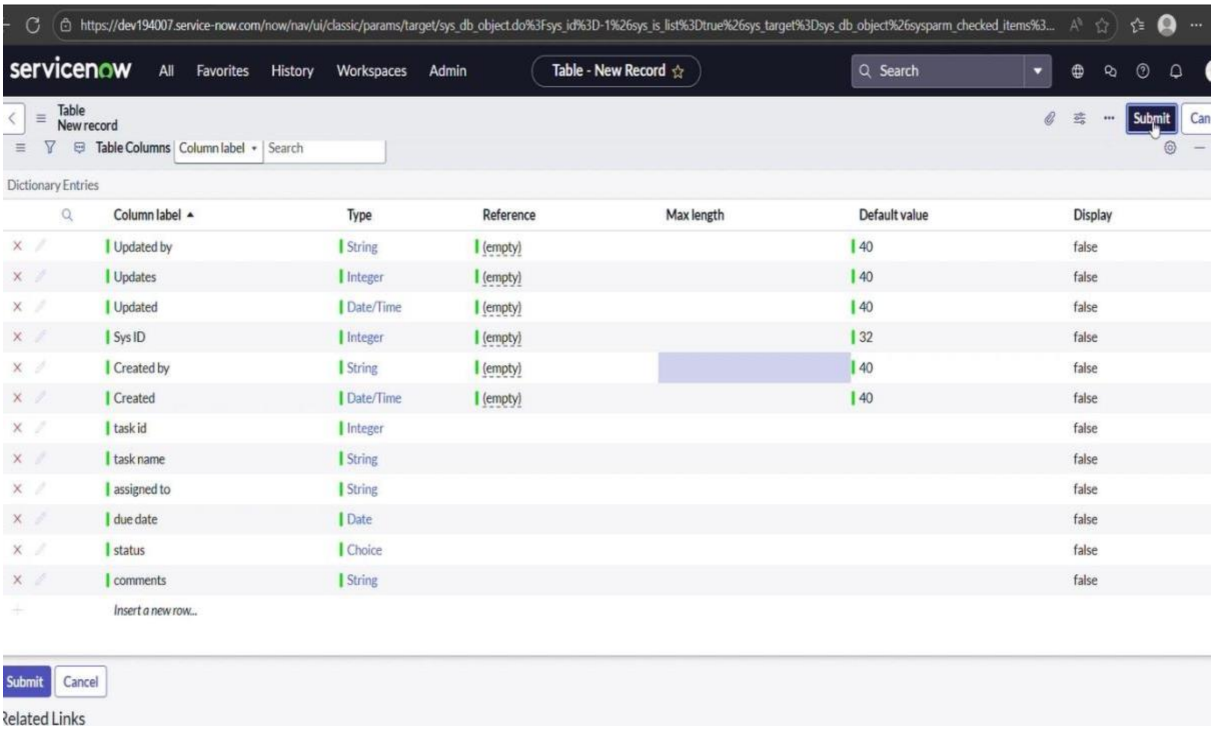
8. Click onsubmit



Createonemoretable:

9. Createanothertableas:tasktable2andfillwithfollowingdetails.

10. Clickonsubmit.



Milestone5:Assignuserstogroups

Activity1:Assignuserstoprojectteamgroup

1. Openservicenow.

2. ClickonAll>>search forgroups

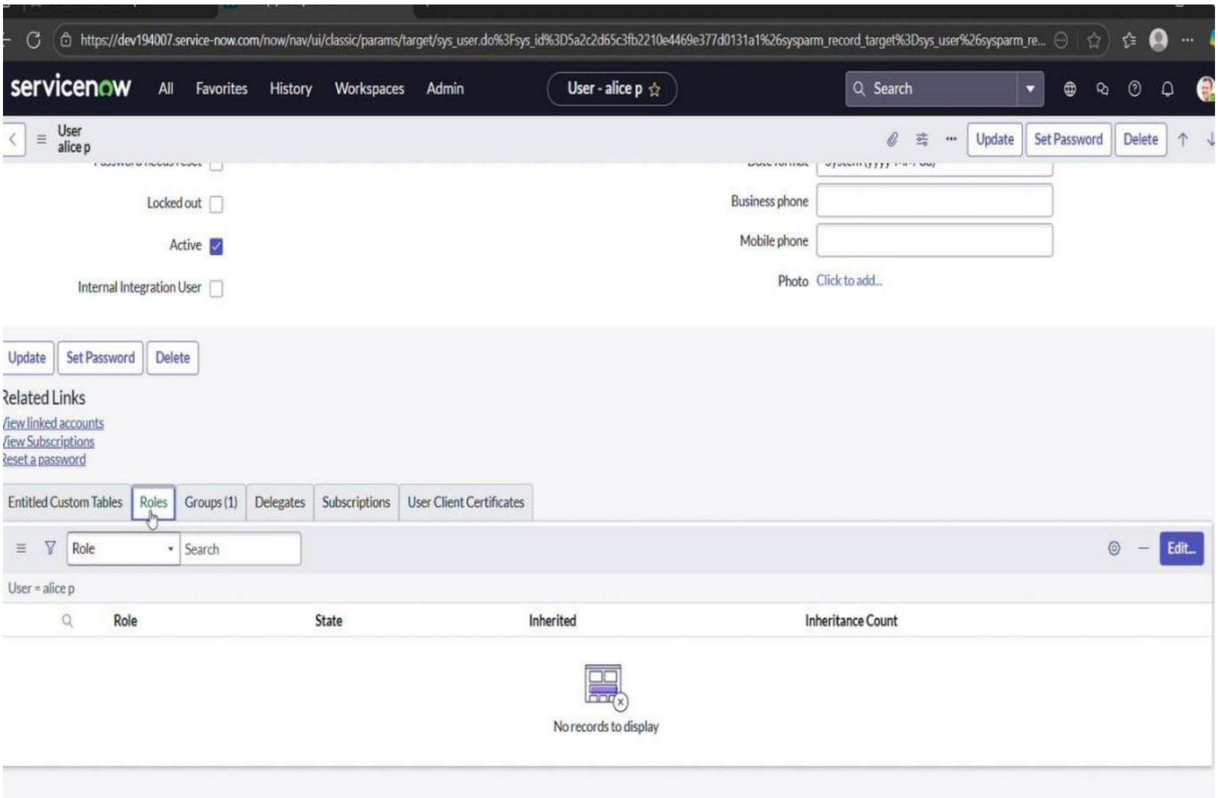
3. Selecttablesunder systemdefinition

4. Selecttheprojectteamgroup

5. Undergroupmembers

6. Clickonedit

7. Selectalicepandbobpandsave



Milestone 6: Assign roles to users

Activity1:Assignrolestoaliceuser

1. Openservicenow.ClickonAll>>searchforuser

2. Selecttablesunder systemdefinition

3. Selecttheproject manageruser

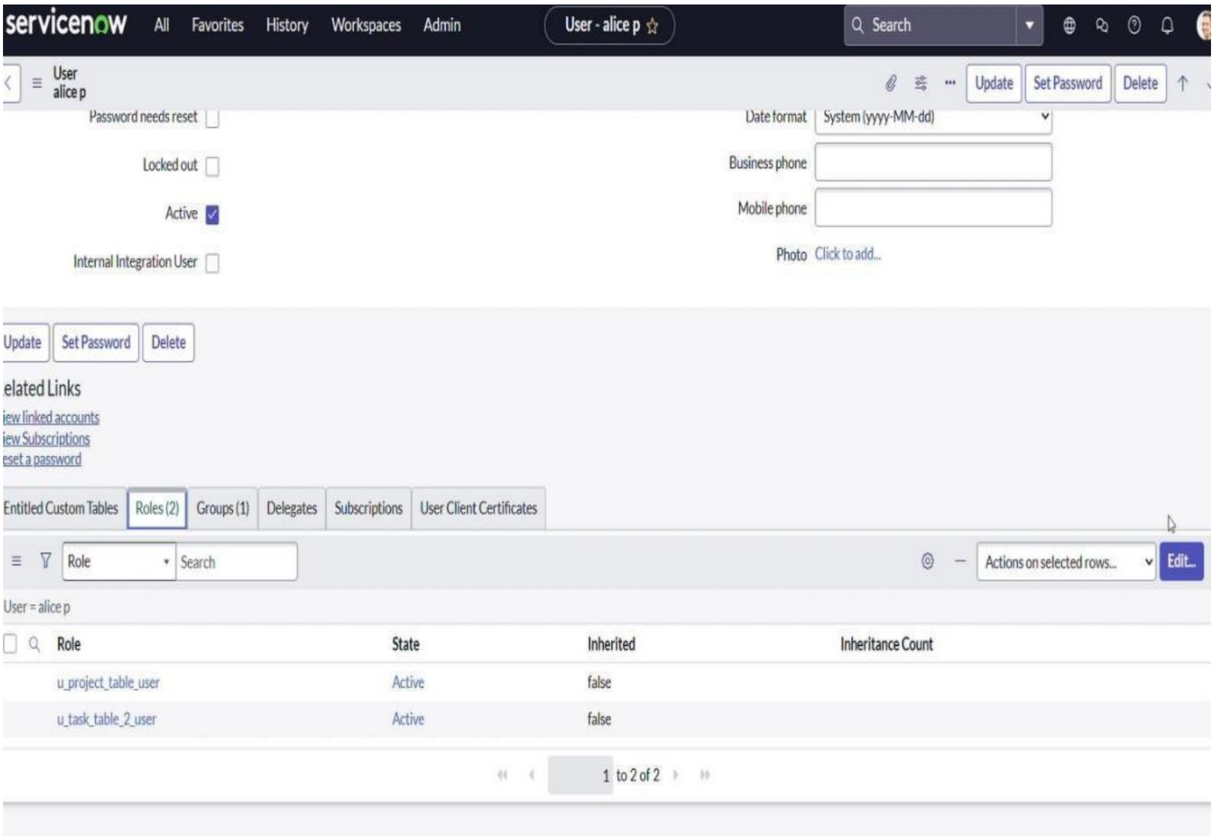
4. Underprojectmanager

5. Clickonedit

6. Selectprojectmemberandsave

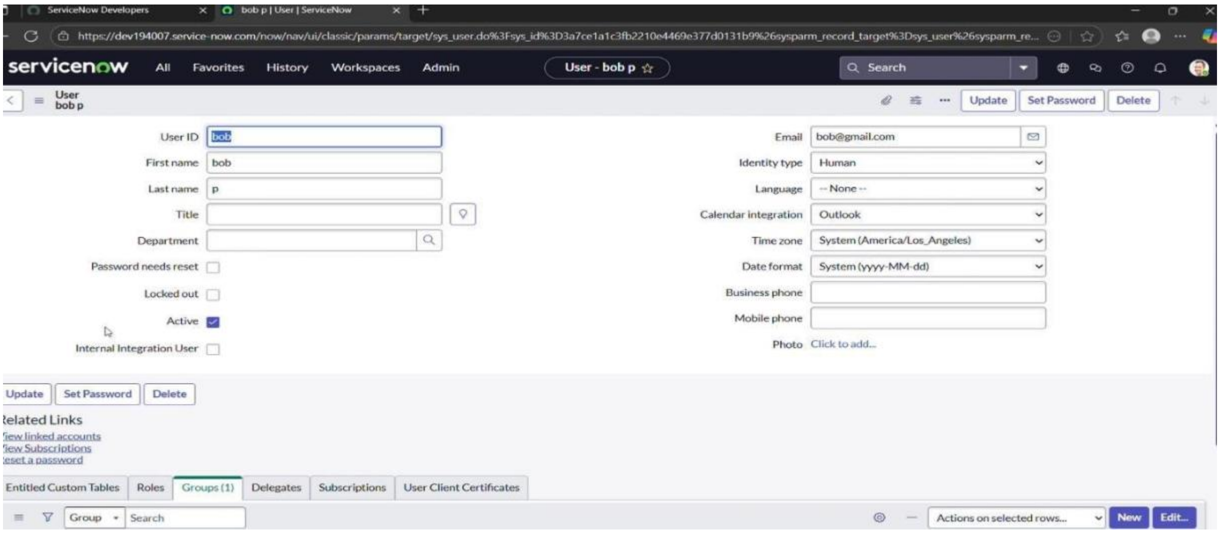
7. clickoneditaddu_project_tableroleandu_task_tablerole

8. clickonsaveandupdatetheform.



Activity2:Assignrolestobobuser

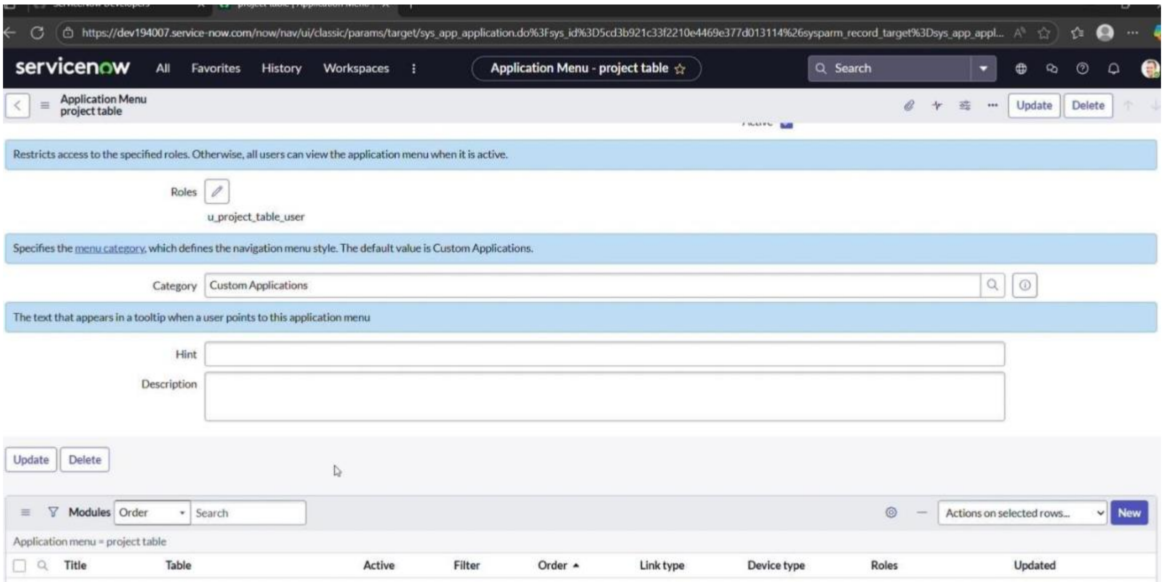
1. Openservicenow.ClickonAll>>searchforuser
2. Selecttablesunder systemdefinition
3. Selectthebobp user
4. Underteammember
5. Clickonedit
6. Selectteammemberandgivetableroleandsave
7. ClickonprofileiconImpersonate usertobob
8. We cansee the tasktable2.



Milestone7:Applicationaccess

Activity1:Assigntableaccesstoapplication

1. whilecreatingatableitautomaticallycreateapplicationandmoduleforthattable
2. Gotoapplicationnavigatorsearchforsearchprojecttableapplication
3. Clickoneditmodule
4. Giveprojectmemberrolestothatapplication
5. Searchfortasktable2and click oneditapplication.
6. Givetheprojectmemberandteammemberrolefortasktable2 application



Milestone8:Accesscontrollist Activity

1: Create ACL

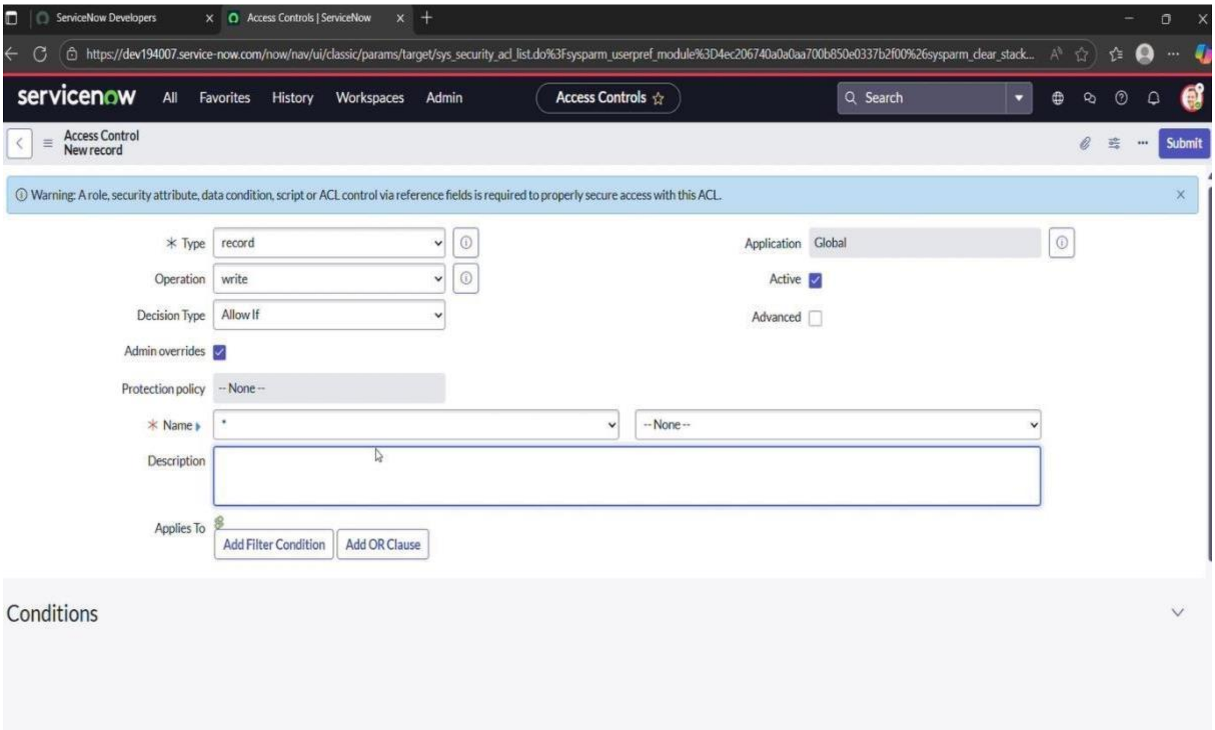
1. Openservicenow.

2. ClickonAll>>search forACL

3. SelectAccessControl(ACL) undersystemsecurity

4. Clickonelevaterole

5. Click onnew



6. Fillthefollowingdetailsto createanewACL

7. Scrolldownunderrequiresrole

8. Doubleclickoninsertanewrow

9. Givetasktableandteammemberrole

10. Clickonsubmit

11. Similarlycreate4 aclforthefollowingfields

12. Clickonprofile ontoprightside

13. Clickonimpersonateuser

14. Select bobuser

15. Gotoallandselecttasktable2intheapplication menubar

16. Commentandstatusfields havetheeditaccess

Milestone9:Flow

Activity1:CreateaFlowtoAssignoperationstickettogroup

1. Openservicenow.

2. Click onAll>>searchforFlow Designer

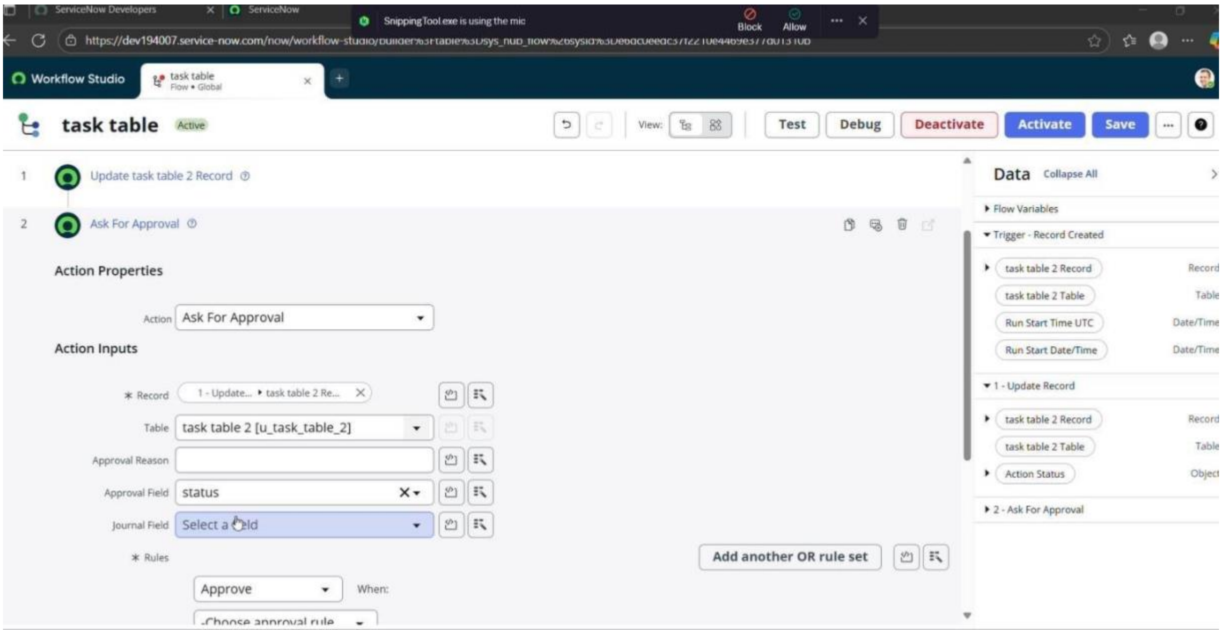
3. ClickonFlowDesignerunderProcessAutomation.

4. AfteropeningFlowDesignerClickonnewandselectFlow.

5. UnderFlowpropertiesGiveFlowNameas “tasktable”.

6. ApplicationshouldbeGlobal.

7. Clickbuildflow.



nextstep:

1. Click onAdda trigger

2. SelectthetriggerinthatSearchfor“createrecord”andselectthat.

3. Givethetablenameas“tasktable”.

4. GivetheConditionasField:statusOperator:isValue:inprogress

Field:commentsOperator:isValue:feedback Field:

assigned to Operator: is Value: bob

5. AfterthatclickonDone.

Nextstep:

1. ClickonAddanaction.

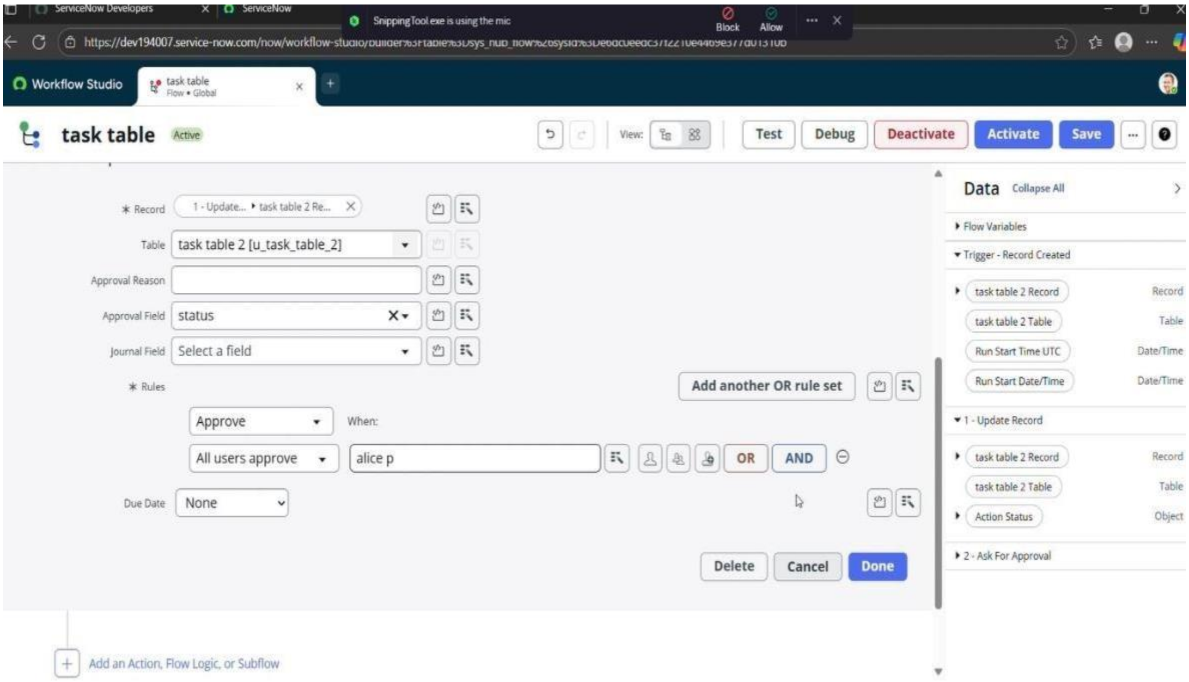
2. Selectactioninthat,searchfor“updaterecords”.

3. InRecordfield dragthefieldsfromthedatanavigation fromRightSide(Datapill)

4. Tablewillbeautoassignedafterthat

5. Addfieldsas“status”andvalueas“completed”

6. Click onDone.



Nextstep:

1. NowunderActions.

2. ClickonAddanaction.

3. Selectactioninthat,searchfor“askforapproval”.

4. InRecordfield dragthefieldsfromthedatanavigationfromRightside

5. Tablewillbeautoassignedafterthat

6. Givetheapprovefieldas“status”

7. Giveapproverasalicep

8. Click onDone.

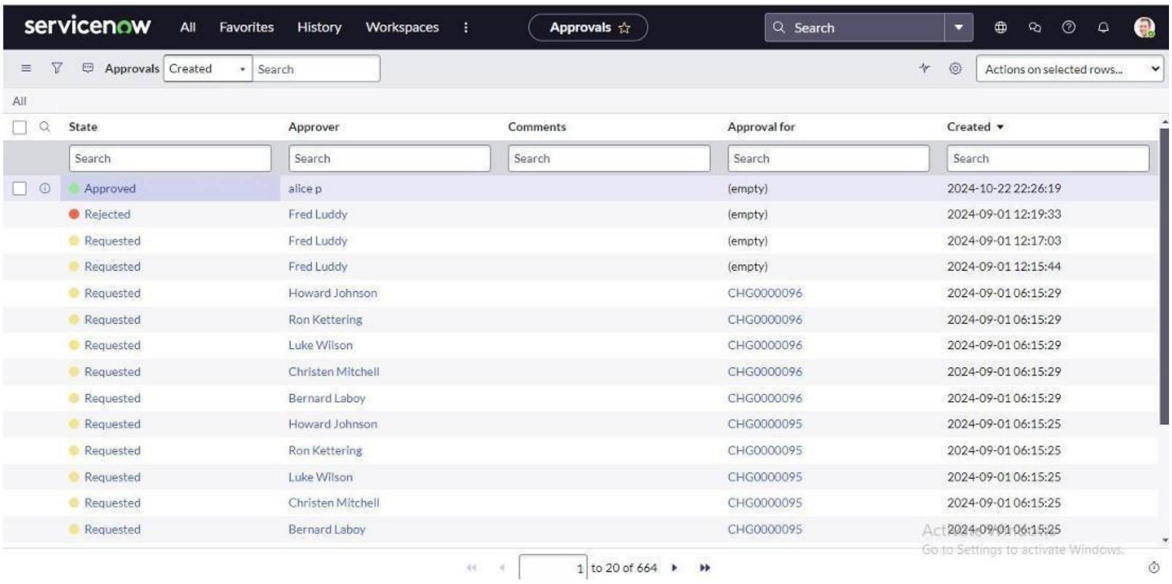
9. Gotoapplicationnavigatorsearchfortasktable.

10. Itstatusfieldisupdatedtocompleted

11. Gotoapplication navigatorandsearchfor myapproval

12. Clickonmyapprovalundertheservice desk.

13. Alicepgot approvalrequestthenrightclickonrequestedthenselectapproved



Conclusion:

This approachprovides a streamlined systemfor managing projects by defining roles, applying access restrictions, and organizing workflows. It helps the team collaborate effectively, improves accountability, simplifies task tracking, and ensures successful project delivery.