Streamlining Ticket Assignment for Efficient Support Operations

1.Introduction

The objective of this initiative is to implement an automated system for ticket routing at ABC Corporation, aimed at improving operational efficiency by accurately assigning support tickets to the appropriate teams.

This solution will:

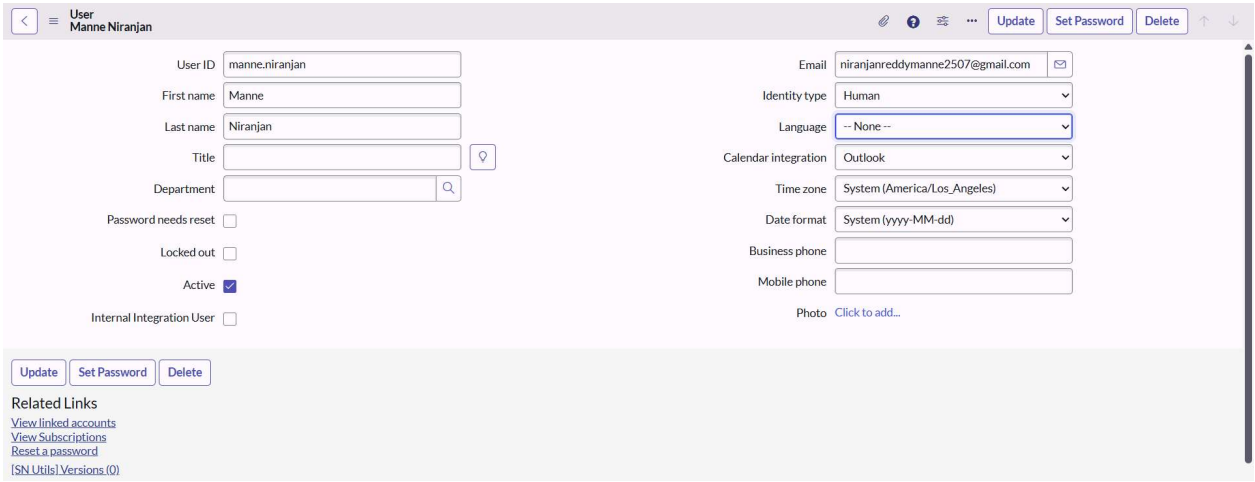
- Reduce delays in issue resolution
- Enhance customer satisfaction
- Optimize resource utilization within the support department

2. System Setup and Configuration

2.1 Create Users

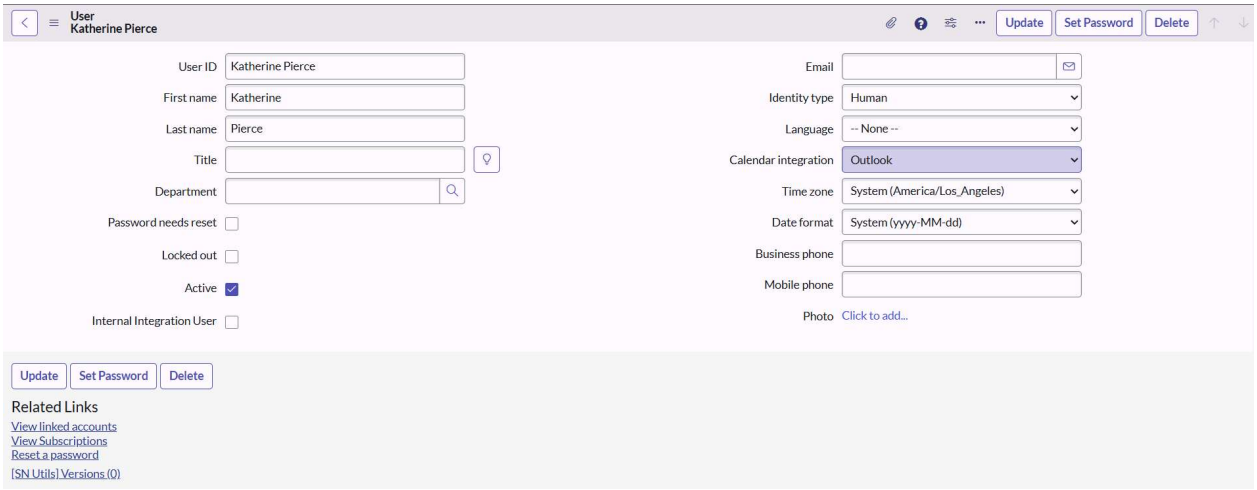
1. **Log in to ServiceNow**

   Open your ServiceNow instance and sign in with the appropriate admin credentials
2. **Navigate to the User Module**
   - Go to the left-hand navigation panel.
   - Click All (or the search bar).
   - Type Users in the filter navigator.
   - Select Users under the System Security section.
3. **Create the First User**
   - Click New to open the user creation form.
   - Fill in the required fields:
     - First Name as Manne
     - Last Name as Niranjan
     - User ID as manne.niranjan
     - Email as niranjanreddymanne2507@gmail.com
     - Password (if required)
     - Roles (if needed)
   - After entering all details, click Submit to save.



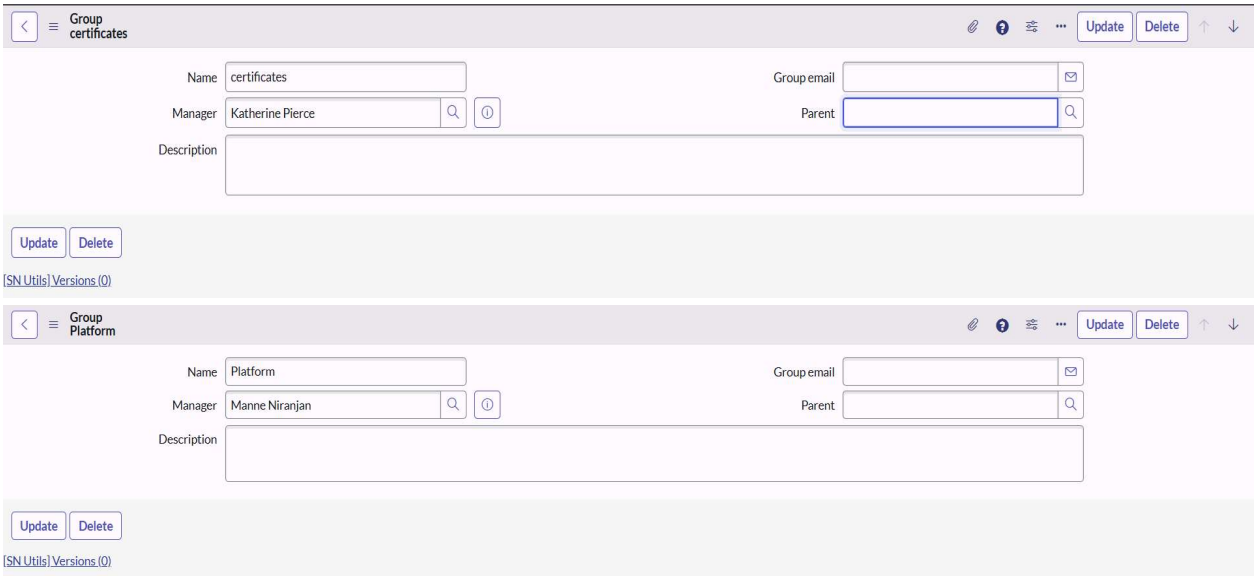
4. Create the Second User

- Once the first user is created, click New again.
- Enter the details of second user
    - First Name as Katherine
    - Last name as Pierce
    - User ID as Katherine Pierce
    - Click Submit to Save



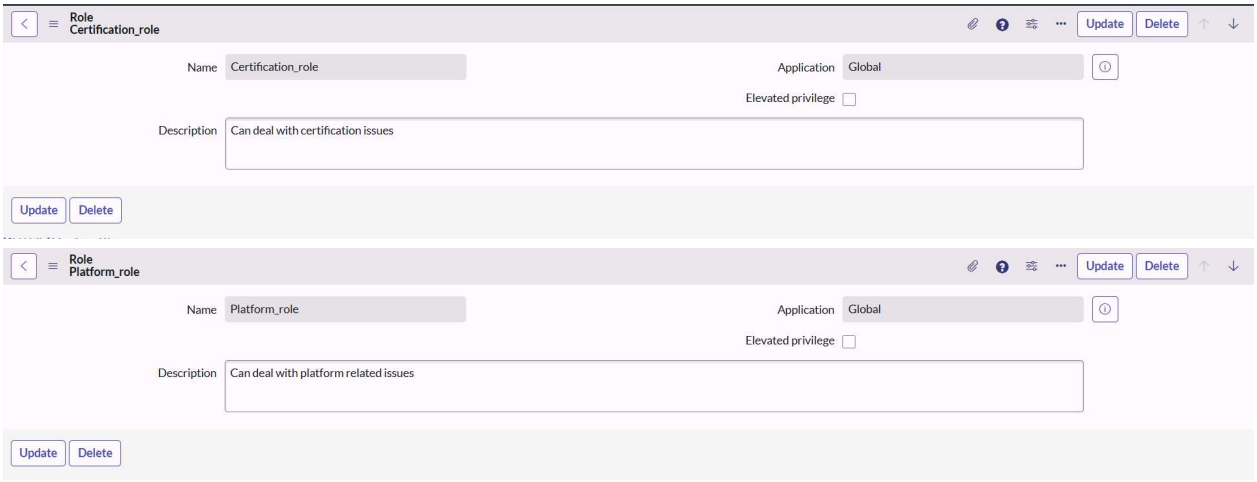
2.2 Create Groups

1. Open ServiceNow.
2. Click on All --> serach for Groups
3. Select Groups under System Security.
4. Click on New.
5. Create two Groups named Certificates and Platform.
6. Enter group details (Name, Manager, Description, etc) as shown in the below image.
7. Click on Submit.



2.3 Create Roles

1. Open ServiceNow and log in.
2. Click All → search for Roles.
3. Select Roles under System Security.
4. Click New.
5. Create two roles Certification_role and Platforn_role.
6. Enter the role details (Name, Description, etc.) as shown in the below image.
7. Click Submit.



2.4 Create Table

1. Open ServiceNow and log in.
2. Click All → search for Tables.
3. Select Tables under System Definition.
4. Click New.
5. Fill the details
    - Label: Operations related
    - Check Create module and Create mobile module
    - New menu name: Operations related
5. Under Table Columns, add the required columns.
6. Click Submit to create the table.

Create Choices for "Issue" Field

1. Open the newly created table record.
2. Click Form Design.
3. Select the Issue field.
4. Add the following choices:
    - unable to login to platform
    - 404 error
    - regarding certificates
    - regarding user expired
5. Save the form.

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Table
Operations related

Delete | Update | Delete All Records

* Label: Operations related
* Name: u_operations_related
Application: Global
Remote Table:

Columns | Controls | Application Access

Table Columns | for text | Search | 1 to 14 of 14 | New

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Updated	Date/Time	(empty)	40		false
Priority	String	(empty)	40		false
Issue	String	(empty)	40	regarding user expired	false
Comment	String	(empty)	40		false
Service request No	String	(empty)	40		false
Ticket raised Date	Date/Time	(empty)	40		false
Assigned to group	Reference	Group	32		false
Name	String	(empty)	40		false
Assigned to user	Reference	User	32		false
Created by	String	(empty)	40		false
Created	Date/Time	(empty)	40		false
Sys ID	Sys ID (GUID)	(empty)	32		false

Properties

Label: Issue
Name: u_issue
Type: String
Default: regarding user expired
Mandatory
Read Only
Dependent:

Choices

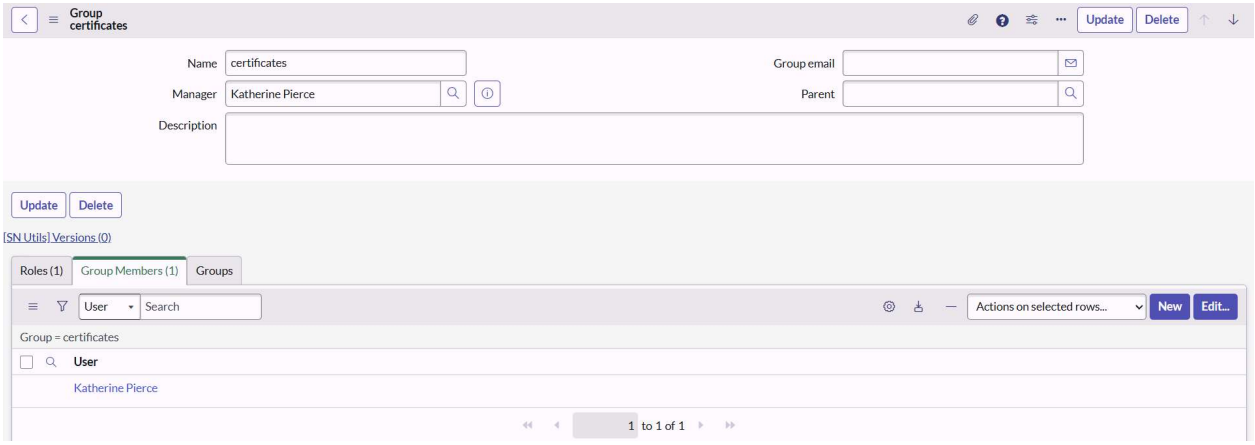
Choice type: Dropdown with none

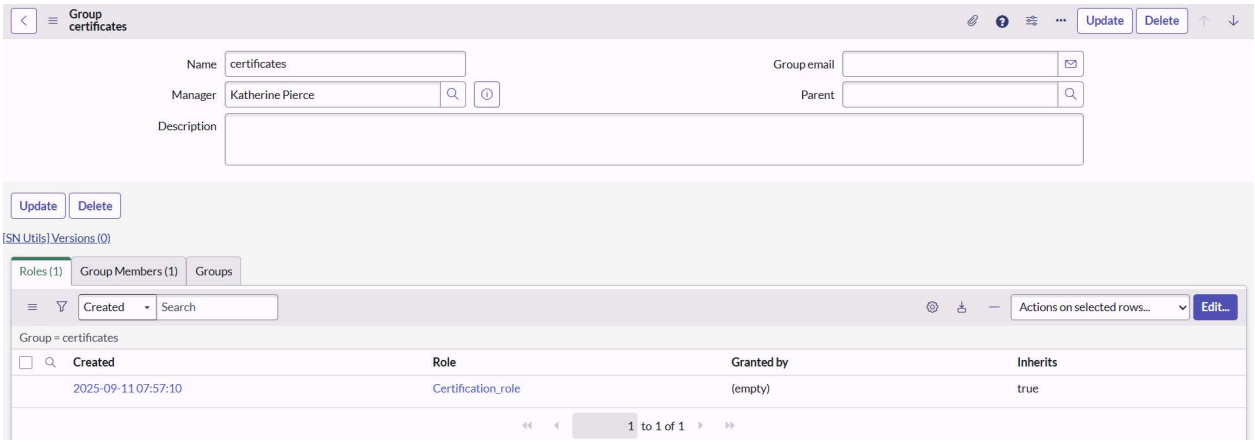
unable to login to platform	unable to login to platform	
404 error	404 error	
regarding certificates	regarding certificates	
regarding user expired	regarding user expired	

3. Roles and Group Assignments

3.1 Assign Roles & Users To Certificate Group

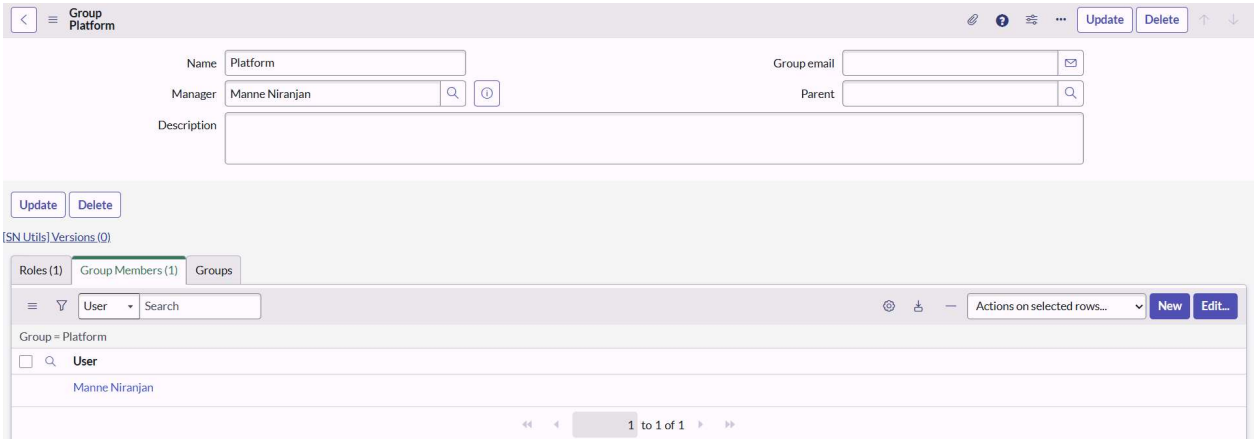
1. Open ServiceNow and log in.
2. Click All → search for Groups.
3. Select Groups under System Security.
4. Open the Certificates group.
5. Scroll to group members → Click Edit
6. Select Katherine Pierce from the list and save.
7. Go to the Roles tab.
8. Add Certification_role and save.

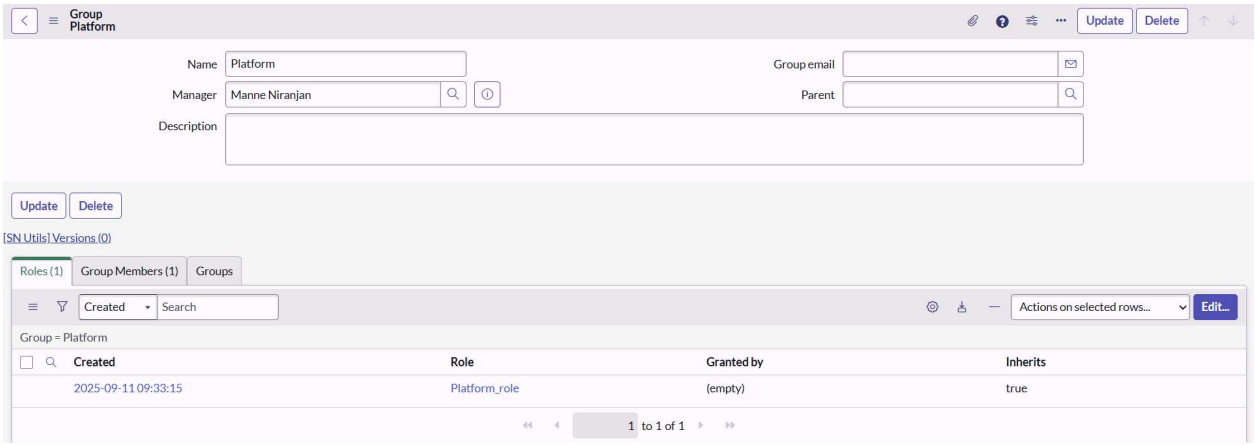




3.2 Assign Users & Roles to Platform Group

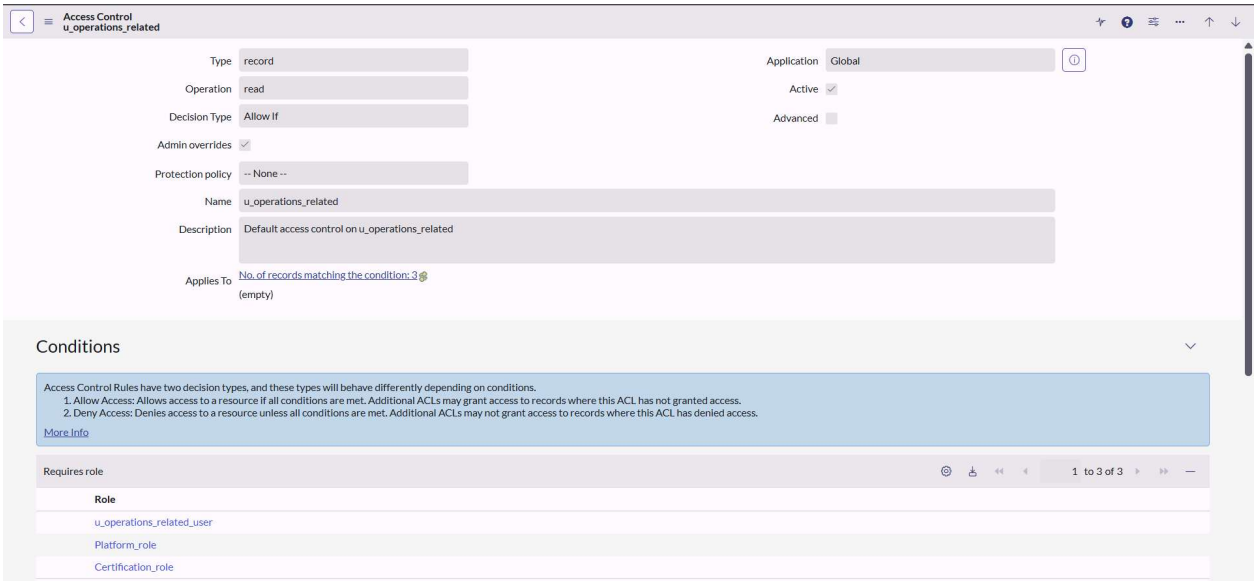
1. Open ServiceNow and log in.
2. Click All → search for Groups.
3. Select Groups under System Security.
4. Open the Platform group.
5. Under Group Members, click Edit.
6. Select Manne Niranjan from the list and save.
7. Go to the Roles tab.
8. Add Platform_role and save.



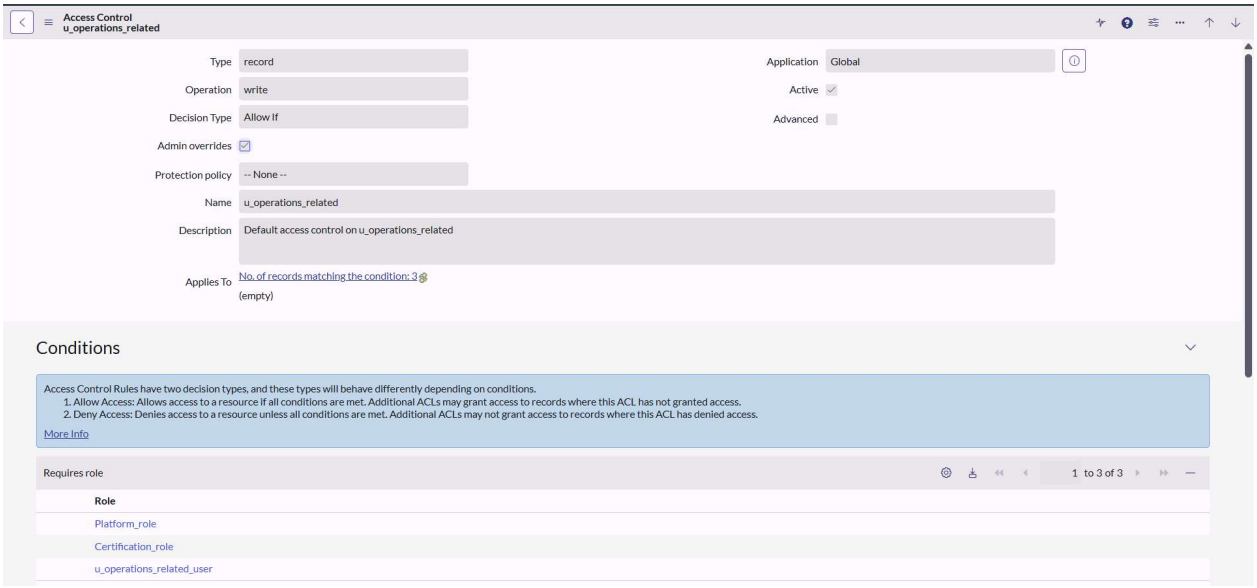


3.3 Assign Roles to a Table in ServiceNow

1. Open ServiceNow and log in.
2. Click All → search for Tables.
3. Select Tables under System Definition.
4. Open the Operations related table.
5. Go to Application Access.
6. Click on u_operations_related – Read operation.
7. Click your profile icon (top-right) → choose Elevate Role.
8. Select security_admin and click Update.
9. In Requires role, double-click Insert a new row.
10. Add Platform_role.
11. Add Certificate_role
12. Click Update to save.

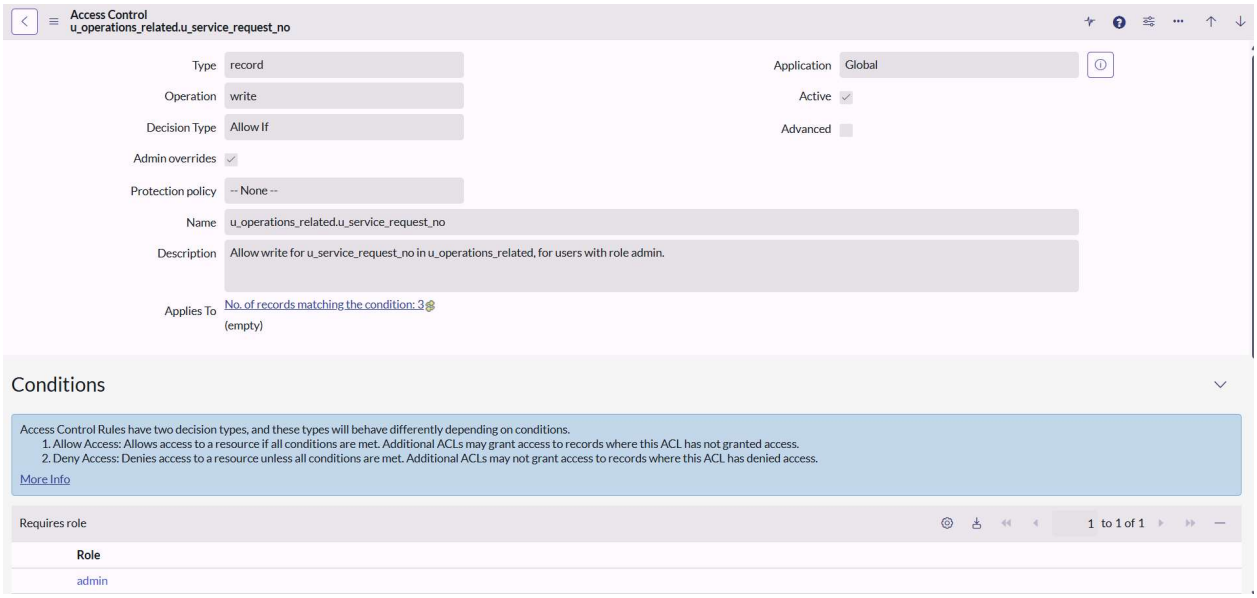


1. Click on u_operations_related write operation.
2. Under Requires role.
3. Double click on insert a new row.
4. Give platform role.
5. And add certification role and click update to save.

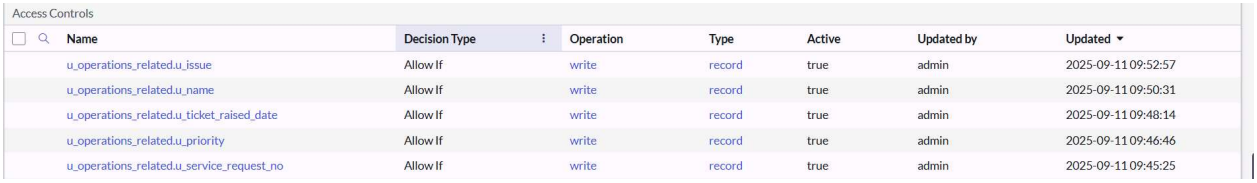


4. Access Control List (ACL) creation

1. Open ServiceNow and log in.
2. Click All → Search for ACL.
3. Select Access Control (ACL) under system security.
4. Fill the following details to create a new ACL.



5. Scroll down under requires role.
6. Double click on insert a new row and give admin role.
7. Click on submit.
8. Similary create 4 acl for the following fields.



Access Controls

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_operations_related.u_issue	Allow If	write	record	true	admin	2025-09-11 09:52:57
u_operations_related.u_name	Allow If	write	record	true	admin	2025-09-11 09:50:31
u_operations_related.u_ticket_raised_date	Allow If	write	record	true	admin	2025-09-11 09:48:14
u_operations_related.u_priority	Allow If	write	record	true	admin	2025-09-11 09:46:46
u_operations_related.u_service_request_no	Allow If	write	record	true	admin	2025-09-11 09:45:25

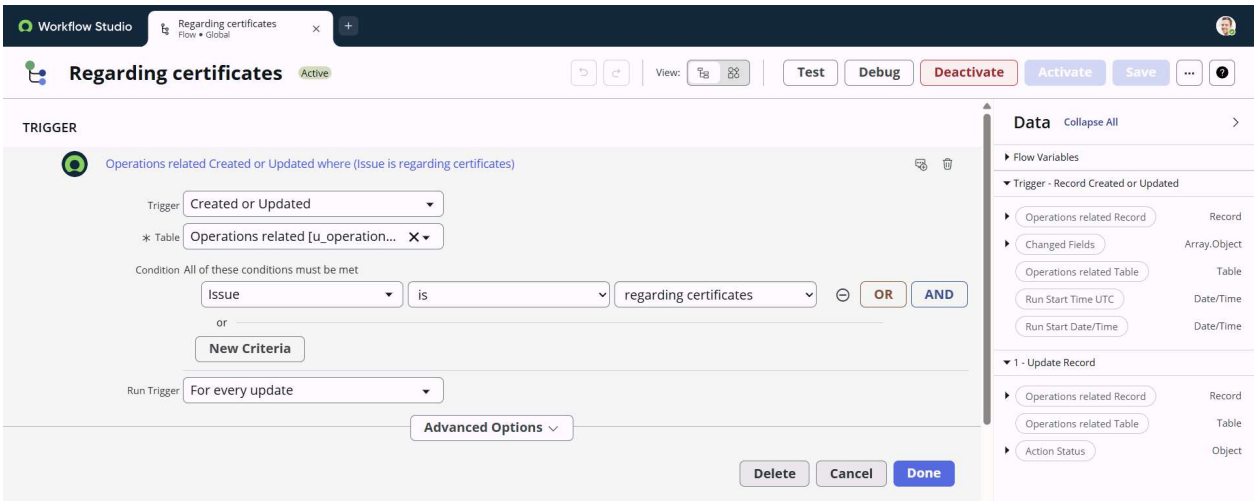
5. Flow Automation

5.1 Create a Flow to Assign Operations Ticket To Certificates Group

1. Open ServiceNow and log in.
2. Click All → search for Flow Designer.
3. Select Flow Designer under Process Automation
4. Click New → select Flow.
5. In Flow Properties:
    - Flow Name: Regarding Certificate
    - Application: Global
    - Run As: System User
6. Click Submit to save.

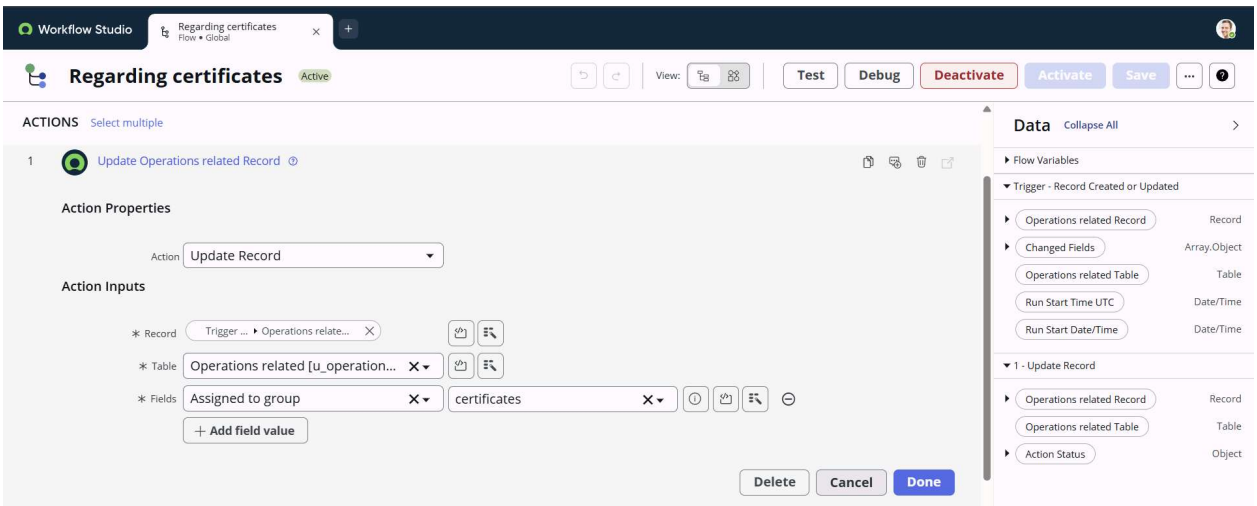
Add trigger in Flow Designer

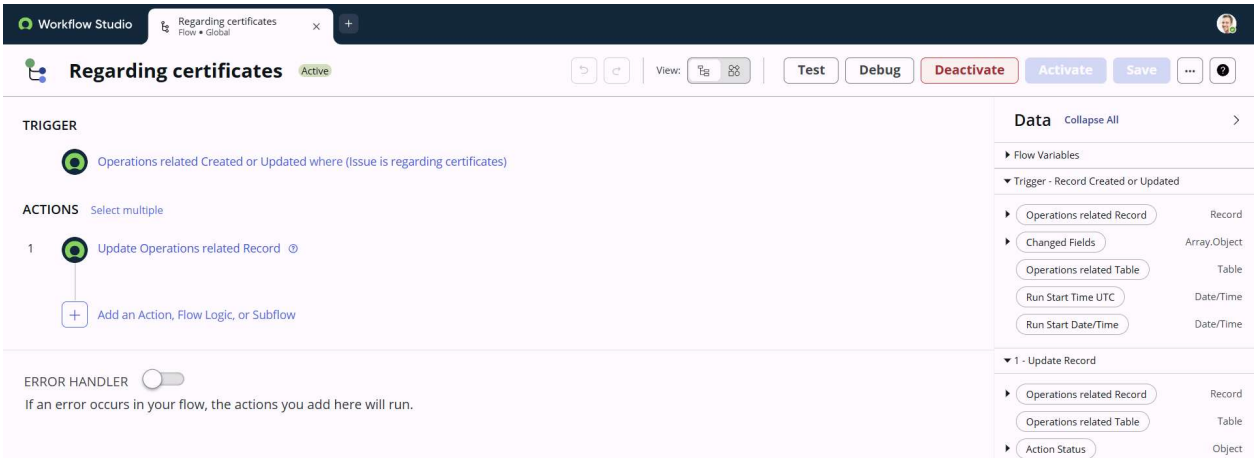
1. Inside the Regarding Certificate click on Add a Trigger.
2. Search for Create or Update a record and select it.
3. Set the table to Operations related.
4. Add a condition:
5. Click Done to save the trigger.
    - Field: Issue
    - Operator: is
    - Value: regarding certificates



Add an Action in Flow Designer

1. Go to the Actions section and click Add an Action.
2. Search for Update Record and select it and tablw will auto-fill.
3. Under field, select Assigned to group.
4. Set the Value to Certificates.
5. Click Done.
6. Cick Save to save the flow.
7. Click Activate to enable the flow.



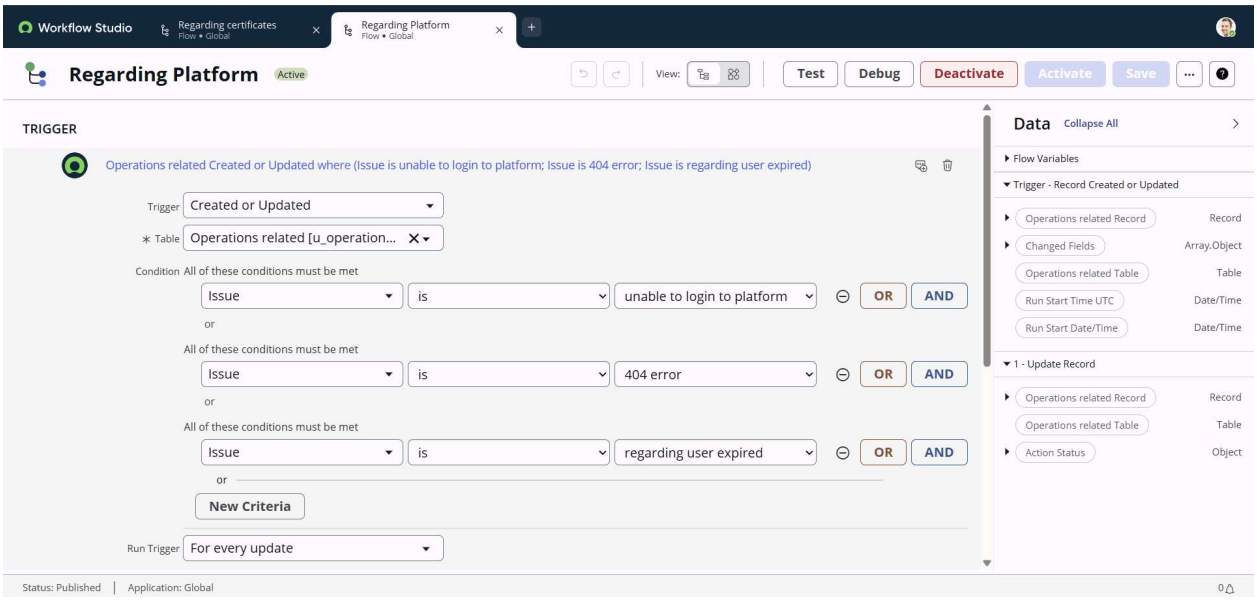


5.2 Create a Flow to Assign Operations Ticket To Platform Group

1. Open ServiceNow and search for Flow designer.
2. Click on New → select Flow.
3. In Flow Properties:
    - Flow Name: Regarding Platform
    - Application: Global
    - Run As: System User
4. Click Submit.

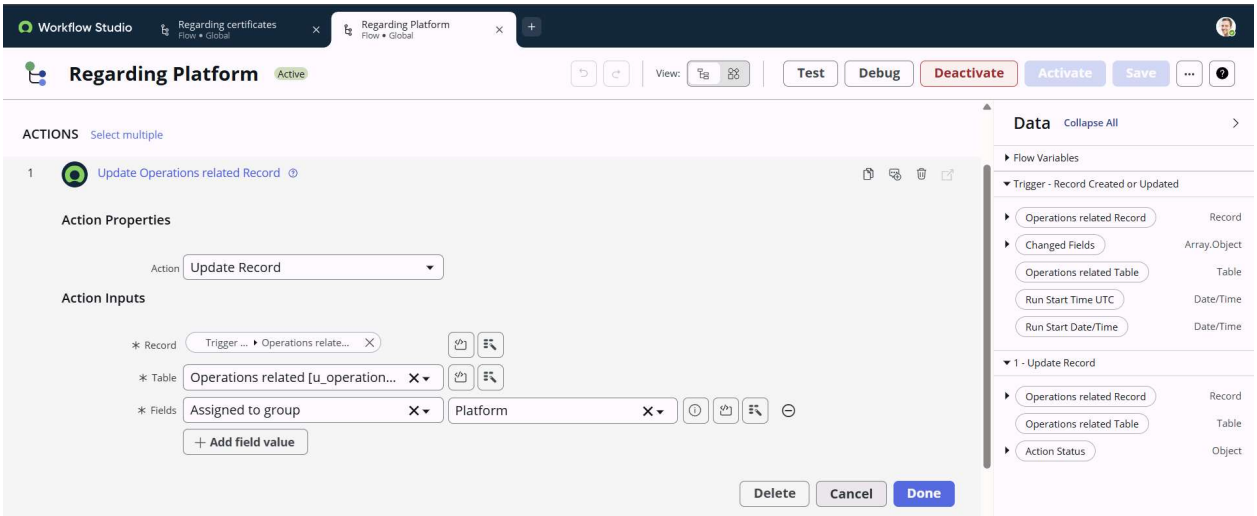
Add a Trigger

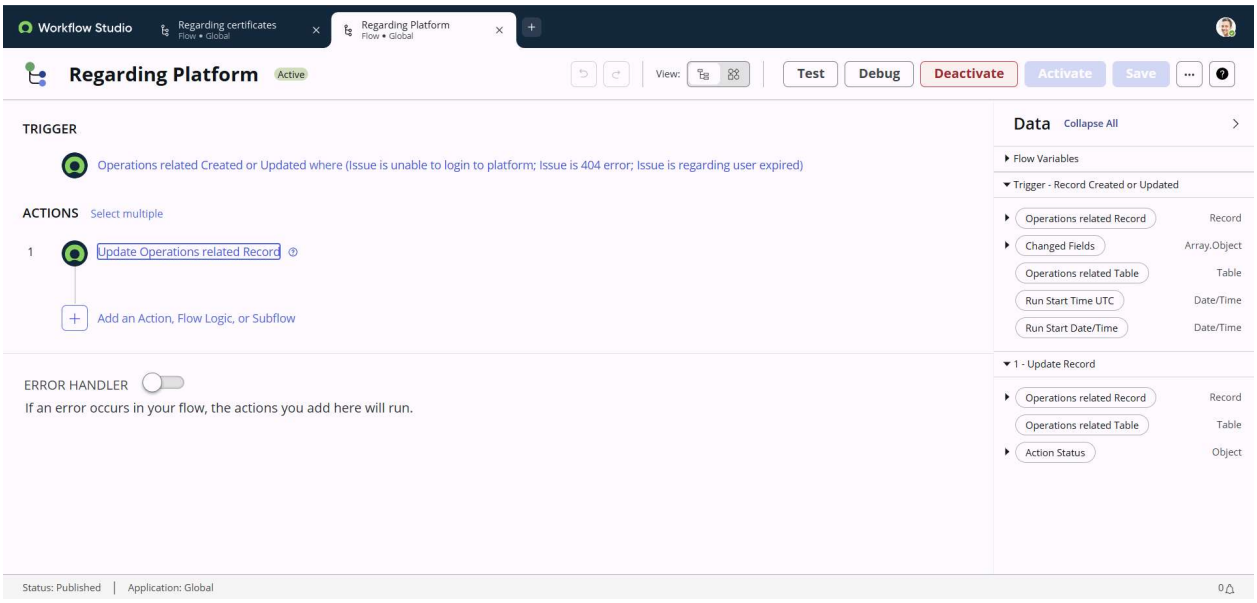
1. Click Add a Trigger.
2. Search for Create or update a record and select it.
3. Set Table as Operations related.
4. Add Conditions:
    - Field: issue | Operator: is | Value: Unable to login to platform
    - Click New Criteria → add Field: issue | Operator: is | Value: 404 Error
    - Click New Criteria → add Field: issue | Operator: is | Value: Regarding User expired
5. Click Done.



Add an Action

1. In Actions, click Add an Action.
2. Search for Update Record and select it.
3. In Record drag therecord from Data Panel and the table will auto-fill.
4. In Field, select Assigned to group.
5. Set the Value to Platform.
6. Click Done.
7. Save and Activate the flow.





6. Final Outcome

The automated system ensures that tickets are dynamically assigned to the correct groups (Certificates or Platform) based on the issue field. This results in:

- Faster issue resolution
- Improved customer experience
- Optimized use of support resources