

ServiceNow Ticket Assignment Automation

Project Report: Streamlining Ticket Assignment for Efficient Support Operations

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Category: ServiceNow

1. Ideation Phase

The primary motivation behind this project is to eliminate inefficiencies in manual ticket routing processes at ABC Corporation. The manual method often leads to delayed resolutions, incorrect assignments, and underutilized support resources. The idea is to implement an automated, condition-based ticket assignment system using ServiceNow Flow Designer, minimizing delays and improving user satisfaction.

2. Requirement Analysis:

- Automate ticket routing in ServiceNow.
- Route based on issue type.
- Assign tickets to the right support group automatically.

Requirements:

- Create users and assign them roles.
- Create support groups.
- Define roles and ACL permissions.
- Design tables with specific columns and choice values.
- Implement logic-based flow automation.
- Maintain secure access and role-based data access.

3. Project planning phase

- User & Role Management
- Group Creation
- Table Creation with Column Design
- ACL Setup
- Flow Designer Automation

Resources Used:

- ServiceNow Developer Instance
- Security Admin Role
- System User

4. Project Design phase:

User Creation

1. Open ServiceNow.
2. Go to All > Users (System Security)
3. Click New, enter required details, click Submit.

The screenshot shows the ServiceNow User creation interface. The user ID is set to 'Katherine Pierce'. Other fields include First name ('Katherine'), Last name ('Pierce'), Title (''), Department (''), Email (''), Language ('-- None --'), Calendar integration ('Outlook'), Time zone ('System (America/Los_Angeles)'), Date format ('System (yyyy-MM-dd)'), Business phone (''), Mobile phone (''), and Photo ('Click to add...'). Active status is checked. There are also checkboxes for Password needs reset, Locked out, Web service access only, and Internal Integration User. At the bottom, there are 'Update', 'Set Password', and 'Delete' buttons, along with a 'Related Links' section containing 'View linked accounts', 'View Subscriptions', and 'Reset a password'. A navigation bar at the top includes tabs for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The bottom of the screen shows a taskbar with various icons and system status information.

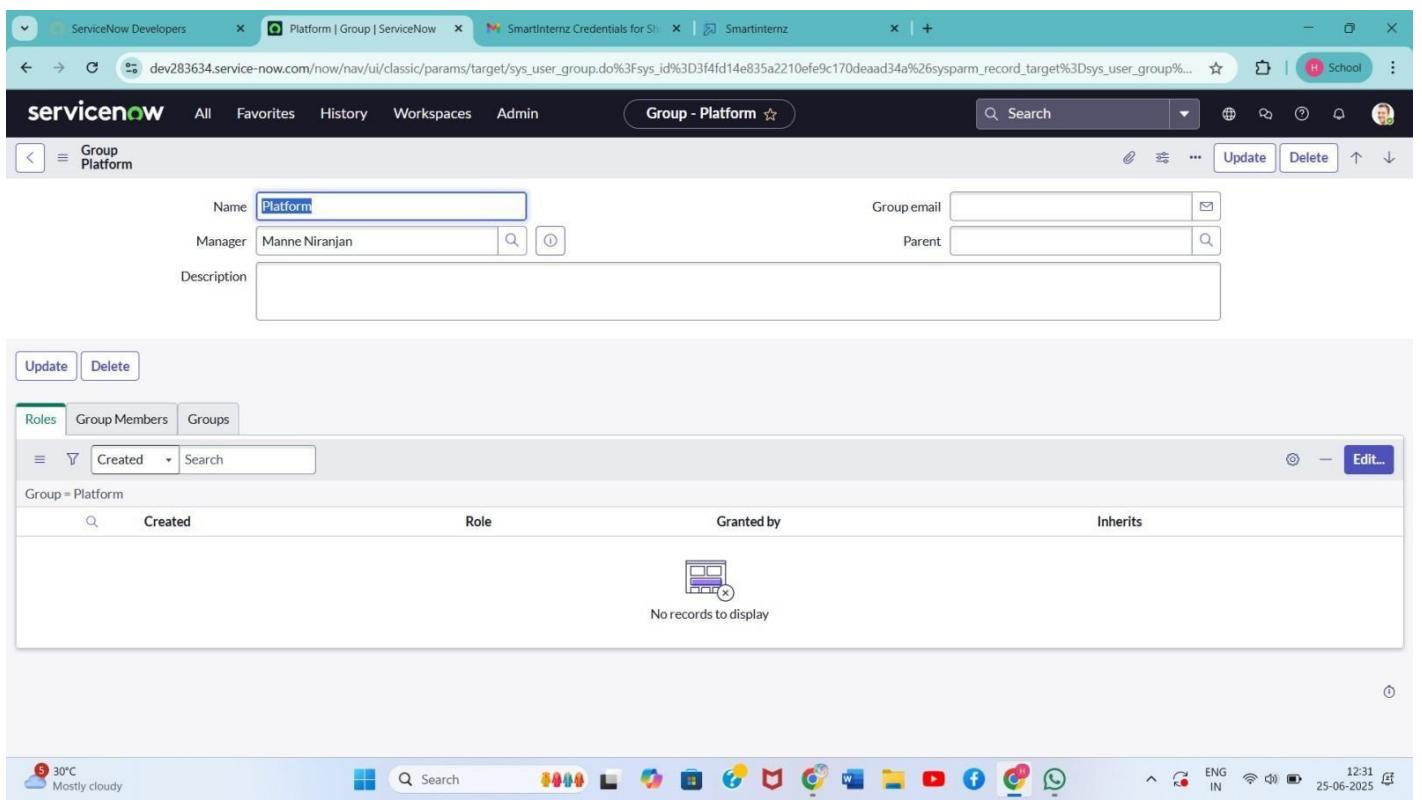
The screenshot shows the ServiceNow User creation interface. The user ID is set to 'Katherine Pierce'. Other fields include First name ('Katherine'), Last name ('Pierce'), Title (''), Department (''), Email (''), Language ('-- None --'), Calendar integration ('Outlook'), Time zone ('System (America/Los_Angeles)'), Date format ('System (yyyy-MM-dd)'), Business phone (''), and Mobile phone (''). The 'Active' checkbox is checked. Below the form are buttons for 'Update', 'Set Password', and 'Delete'. A 'Related Links' section includes 'View linked accounts', 'View Subscriptions', and 'Reset a password'. At the bottom are tabs for 'Entitled Custom Tables', 'Roles', 'Groups', 'Delegates', 'Subscriptions', and 'User Client Certificates'. The system status bar at the bottom shows weather (30°C, mostly cloudy), search, and system icons.

4. Repeat to create another user.

Group Creation

1. Go to All > Groups (System Security)
2. Click New, fill details for each group (e.g., Certificates, Platform), click Submit.

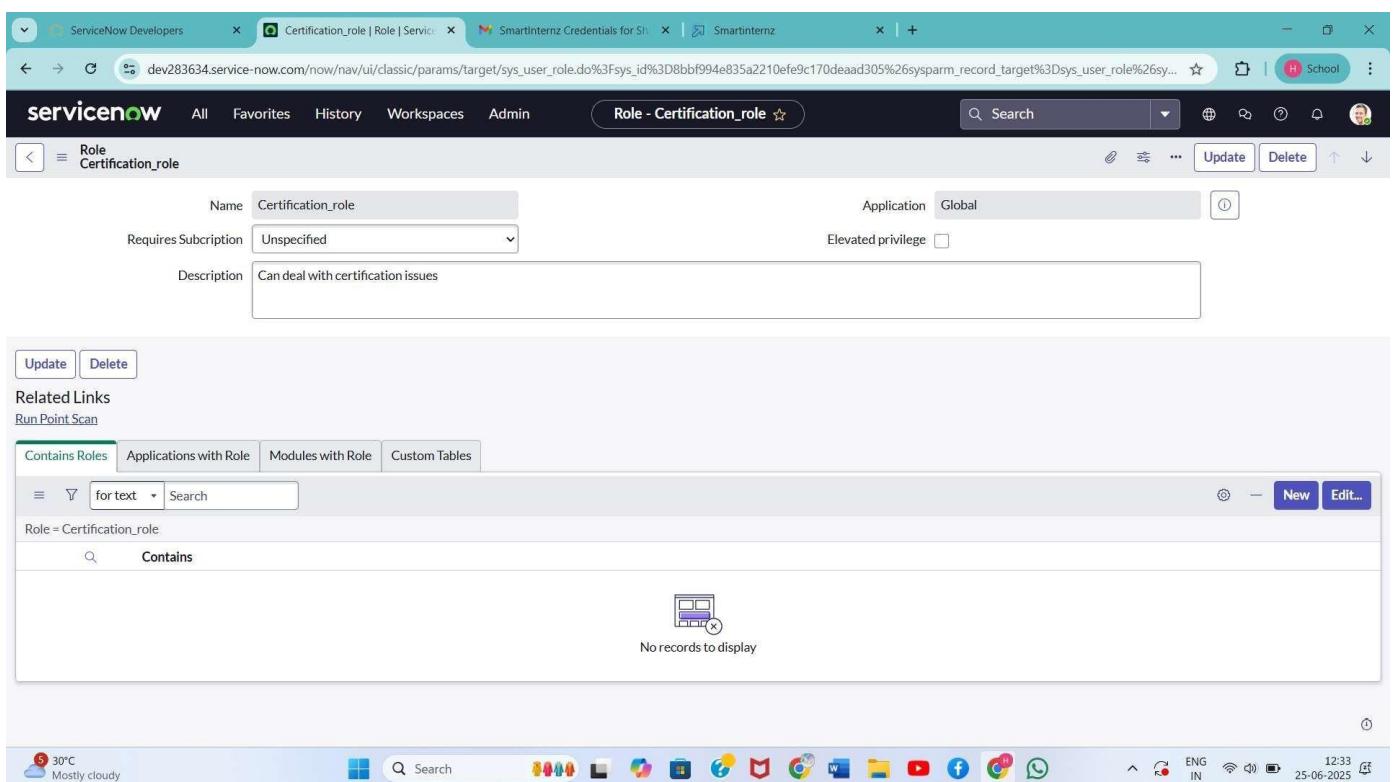
The screenshot shows the ServiceNow Group creation interface. The group name is 'certificates', managed by 'Katherine Pierce'. Other fields include 'Group email' and 'Parent'. Below the form are buttons for 'Update' and 'Delete'. A 'Roles' tab is selected, showing a table with columns 'Created', 'Role', 'Granted by', and 'Inherits'. The table is empty, displaying 'No records to display'. The system status bar at the bottom shows weather (30°C, mostly cloudy), search, and system icons.



The screenshot shows the ServiceNow interface for creating a new group. The top navigation bar includes tabs for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current page is 'Group - Platform'. The main form has fields for 'Name' (set to 'Platform'), 'Manager' (set to 'Manne Nirjanan'), 'Group email' (empty), and 'Parent' (empty). A 'Description' field is also present. Below the form are 'Update' and 'Delete' buttons. A tab bar at the bottom shows 'Roles' (selected), 'Group Members', and 'Groups'. A search bar and filter options ('Created') are available. The 'Roles' section table has columns for 'Created', 'Role', 'Granted by', and 'Inherits'. It displays a single record with a small icon and the message 'No records to display'. The system status bar at the bottom shows weather (30°C, mostly cloudy), system icons, and the date/time (25-06-2025, 12:31).

Role Creation

1. Go to All > Roles (System Security)
2. Click New, fill details for Certification_role and Platform_role, click Submit.



The screenshot shows the ServiceNow interface for creating a new role. The top navigation bar includes tabs for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current page is 'Role - Certification_role'. The main form has fields for 'Name' (set to 'Certification_role'), 'Requires Subscription' (set to 'Unspecified'), 'Application' (set to 'Global'), and 'Elevated privilege' (unchecked). A 'Description' field is also present. Below the form are 'Update' and 'Delete' buttons. A 'Related Links' section includes a 'Run Point Scan' link. A tab bar at the bottom shows 'Contains Roles' (selected), 'Applications with Role', 'Modules with Role', and 'Custom Tables'. A search bar and filter options ('for text') are available. The 'Contains' section table has a column for 'Contains' and displays a single record with a small icon and the message 'No records to display'. The system status bar at the bottom shows weather (30°C, mostly cloudy), system icons, and the date/time (25-06-2025, 12:33).

The screenshot shows the ServiceNow interface for creating a new role. The main form has the following details:

- Name:** Platform_role
- Application:** Global
- Description:** Can deal with platform related issues

Below the form, there is a section titled "Related Links" with a search bar and a table header:

Contains Roles	Applications with Role	Modules with Role	Custom Tables
for text	Search		

The search results table is empty, displaying "No records to display".

Table Creation

1. Go to All > Tables (System Definition)

2. Create a new table:

- Label: Operations related
- Check: Create module & Create mobile module
- Menu Name: Operations related
- Add Columns:
 - issue (Choice field)
 - assigned to group
 - other required fields

3. Use Form Designer to add choices to the issue field:

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

The screenshot shows the ServiceNow interface for managing the 'Operations related' table. The top navigation bar includes tabs for 'ServiceNow Developers', 'Operations related | Table | Serv...', 'Smartinternz Credentials for Sh...', and 'Smartinternz'. The main title is 'Table - Operations related'. The left sidebar shows 'Dictionary Entries' and the table structure. The table has columns for 'Column label', 'Type', 'Reference', 'Max length', 'Default value', and 'Display'. Rows include 'Name' (String), 'Service request No' (String), 'Priority' (String), 'Created by' (String), 'Assigned to user' (Reference to User), 'Ticket raised Date' (Date/Time), 'Sys ID' (Sys ID (GUID)), 'Created' (Date/Time), 'Assigned to group' (Reference to Group), 'Issue' (String), 'Updated by' (String), 'Updates' (Integer), 'Comment' (String), and 'Updated' (Date/Time). Buttons at the bottom allow 'Update', 'Delete', and 'Delete All Records'. The status bar at the bottom shows weather (30°C, mostly cloudy), system icons, and the date/time (25-06-2025, 12:36).

Assign Users to Groups

- Add Katherine Pierce to Certificates group with Certification_role
- Add Manne Nirajanan to Platform group with Platform_role

The screenshot shows the ServiceNow interface for managing access control rules. The top navigation bar includes tabs for 'ServiceNow Developers', 'u_operations_related | Access C...', 'Smartinternz Credentials for Sh...', and 'Smartinternz'. The main title is 'Access Control - u_operations_related'. The left sidebar shows 'Access Control' and 'u_operations_related'. The main content area has sections for 'Conditions' and 'Requires role'. The 'Conditions' section states that access is granted if all four checks evaluate to true. The 'Requires role' section lists 'Role' with options 'Certification_role', 'Platform_role', and 'u_operations_related_user'. Below this are sections for 'Security Attribute Condition' (Local or Existing) and 'Data Condition' (Condition: 6 records match condition). The status bar at the bottom shows weather (SL - BAN Live), system icons, and the date/time (25-06-2025, 12:41).

Access Control (ACL)

1. Go to All > Access Control (ACL)

2. Create ACLs for table Operations related:

- Read: Requires admin, Platform_role, and Certificate_role
- Write: Requires Platform_role and Certificate_role
- Application Access: Enable read/write access accordingly

3. Elevate role using Security Admin if needed

The screenshot shows the ServiceNow Access Control interface for creating a new ACL record. The page title is "Access Control - u_operations_related.u_service_request_no". The form fields include:

- Type: record
- Operation: write
- Admin overrides: checked
- Protection policy: None
- Name: Operations related [u_operations_related]
- Description: (empty)
- Application: Global
- Active: checked
- Advanced: unchecked

Below the form, there is a "Conditions" section with a detailed description of how access control rules work:

Access Control Rules allow access to the specified resource if **all four** of these checks evaluate to true:

1. The user has one of the roles specified in the **Role** list, or the list is empty.
2. Users that do not satisfy the Security Attributes or the Subject Conditions will be denied access to records matching this ACL.
3. Conditions in the **Condition** field evaluate to true, or conditions are empty.
4. The script in the **Script** field (advanced) evaluates to true, or sets the variable "answer" to true, or is empty.

The four checks are evaluated independently in the order displayed above.

At the bottom of the page, there is a "More Info" link and a "Requires role" section showing the assigned role "admin". The browser status bar at the bottom right shows the date and time as 25-06-2025 12:48.

Name	Operation	Type	Active	Updated by	Updated
u_operations_related	create	record	true	admin	2025-06-23 22:41:52
u_operations_related	read	record	true	admin	2025-06-23 23:58:17
u_operations_related	write	record	true	admin	2025-06-24 00:00:05
u_operations_related	delete	record	true	admin	2025-06-23 22:41:52
u_operations_related.u_issue	write	record	true	admin	2025-06-24 01:34:57
u_operations_related.u_name	write	record	true	admin	2025-06-24 01:34:21
u_operations_related.u_priority	write	record	true	admin	2025-06-24 01:25:26
u_operations_related.u_service_request_no	write	record	true	admin	2025-06-24 01:21:29
u_operations_related.u_ticket_raised_date	write	record	true	admin	2025-06-24 01:33:13

Flow Designer Regarding Certificate

1. Go to All > Flow Designer > New Flow
2. Name: Regarding Certificate
3. Application: Global, Run user: System user
4. Trigger:
 - Table: Operations related
 - Condition: issue is regarding certificates
5. Action:
 - Update Record: Assigned to group = Certificates
6. Click Save and Activate

The screenshot shows the ServiceNow Workflow Studio interface. The title bar indicates the URL is https://dev251499.service-now.com/now/workflow-studio/builder%3Ftable%3Dsys_hub_flow%26sysId%3D27ff8286c3162210ffa2b34ed40131b5. The main window displays a flow titled "Regarding Certificate" which is active. The flow has one trigger: "Operations related Created or Updated where (Issue is regarding certificates)". It contains one action: "Update Operations related Record". The "Data" panel on the right lists various flow variables and triggers, such as "Trigger - Record Created or Updated", "Operations related Record", "Changed Fields", and "Run Start Time UTC". The status bar at the bottom shows "Status: Published | Application: Global" and the date "25-06-2025".

Flow Designer Regarding Platform

1. Create New Flow: Regarding Platform

2. Trigger:

- Table: Operations related
- Conditions:
 - issue is Unable to login to platform
 - issue is 404 Error
 - issue is Regarding user expired

3. Action:

- Update Record: Assigned to group = Platform

4. Click Save and Activate

The screenshot shows the ServiceNow Workflow Studio interface. A flow titled "Regarding Platform" is active. The flow details are as follows:

- Trigger:** Created or Updated
- Table:** Operations related [u_operations...]
- Condition:** All of these conditions must be met
 - Issue is unable to login to platform
 - Issue is 404 error
 - Issue is regarding user expired
- Run Trigger:** Once

The right side of the screen displays the "Data" panel with various flow variables and actions listed.

5. Performance

Testing:

Test Scenarios:

- Create a record in Operations related with each issue type
- Verify assignment is correct based on issue
- Validate ACL enforcement by accessing table data with users in different roles

The screenshot shows a ServiceNow ticket record titled "Operations related - Vega". The ticket details are as follows:

Service request no	ticket0001014
Name	Vegeta
Issue	unable to login to platform
Ticket raised Date	2025-06-24 23:18:00
Priority	Low
Comment	40
Assigned to group	Platform
Assigned to user	Maane Niranjan

At the bottom, there are "Update" and "Delete" buttons. The status bar at the bottom indicates "33°C Mostly cloudy" and the date "25-06-2025".

ServiceNow All Favorites History Workspaces : Operations related - Hinata ☆

Operations related Hinata

Service request no: ticket0001016

Name: Hinata

Issue: regarding certificates

Ticket raised Date: 2025-06-25 02:37:04

Priority: Medium

Comment: Slove it ASAP

Assigned to group: certificates

Assigned to user: Katherine Pierce

Update Delete

Results:

- All tickets assigned correctly based on issue
- Unauthorized users restricted from modifying sensitive data
- Groups receive only relevant tickets

Conclusion:

This automation significantly improves the efficiency of ticket handling in ServiceNow. It ensures timely resolution by directing the tickets to appropriate groups based on predefined criteria. The use of Flow Designer and ACLs offers a secure and scalable foundation for managing enterprise-level support systems.