

# STREAMLINING TICKET ASSIGNMENT FOR EFFICIENT SUPPORT OPERATIONS

## Project Description:

The project aims to automate and streamline the ticket assignment process in support operations using the ServiceNow platform. It focuses on reducing manual efforts, ensuring fair workload distribution, and improving response times by assigning tickets based on agent skills, priority and availability. By leveraging ServiceNow's workflow automation, assignment rules, and reporting tools, the solution enables faster resolution of customer issues, improved SLA compliance and higher customer satisfaction. The system ensures transparency, real-time tracking, and continuous performance improvement in support operations.

## Project Flow:

**Milestone 1:** Setting up ServiceNow instance

**Milestone 2:** Creating a new update set

**Milestone 3:** Viewing user records in service now

**Milestone 4:** Viewing and Managing Users

**Milestone 5:** Creating and managing support groups

**Milestone 6:** Viewing and Managing Support Groups

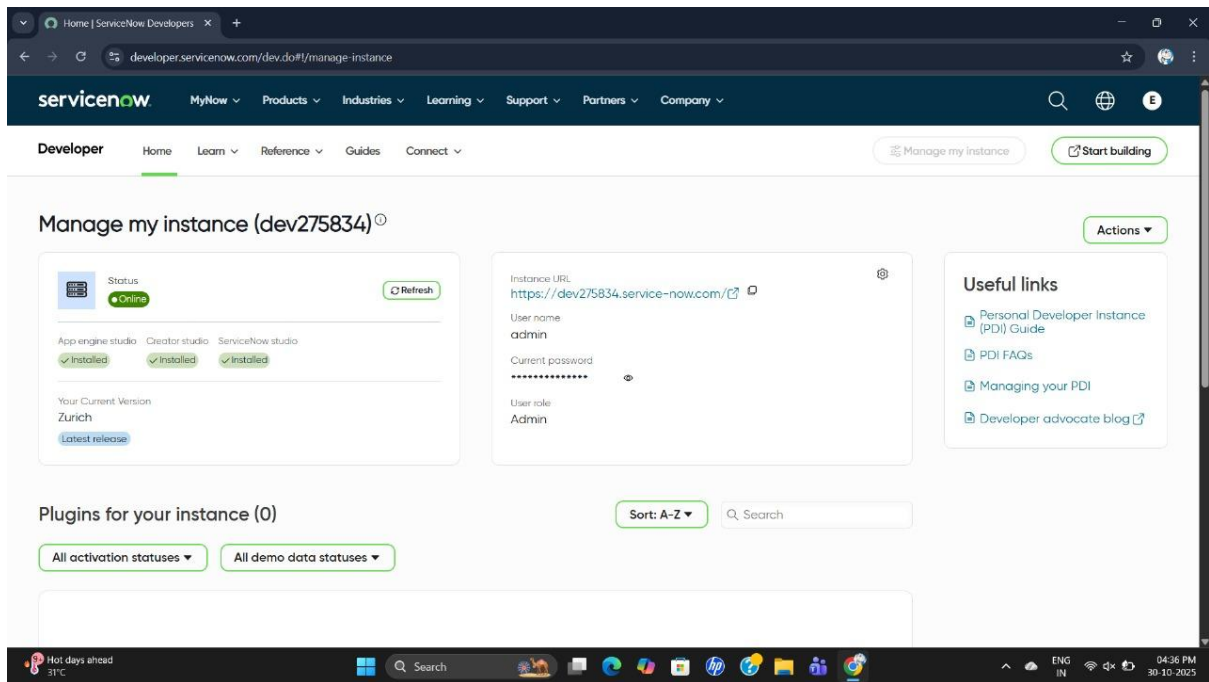
**Milestone 7:** Implementing Access Control for Ticket Operations

**Milestone 8:** Initiating Workflow Automation through Flow Designer

**Milestone 9:** Conclusion

## Milestone 1: Setting Up ServiceNow Instance:

1. Sign up for a developer account on the ServiceNow Developer site "<https://developer.servicenow.com>".
2. Once logged in, navigate to the "Personal Developer Instance" section.
3. Click on "Request Instance" to create a new ServiceNow instance.
4. Fill out the required information and submit the request.
5. You'll receive an email with the instance details once it's ready.
6. Log in to your ServiceNow instance using the provided credentials.
7. Now you will navigate to the ServiceNow.



## Milestone 2: Creation of New Update Set:

Go to User Administration → Users, click New and enter details like:

1. User ID: manne.niranjan
  2. Name: manne Niranjan
  3. Email: manneniranjan@gmail.com.
  4. Set Calendar Integration: Outlook
  5. Time Zone: America/Los\_Angeles, and check Active.
- Finally, click Update to save.

The screenshot shows the 'User manne niranjan' form in the ServiceNow User Administration interface. The form is divided into two main sections: 'User Information' and 'User Settings'.

**User Information:**

- User ID: manne.niranjan
- First name: manne
- Last name: niranjan
- Title: (empty)
- Department: (empty)

**User Settings:**

- Email: manneniranjan@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...

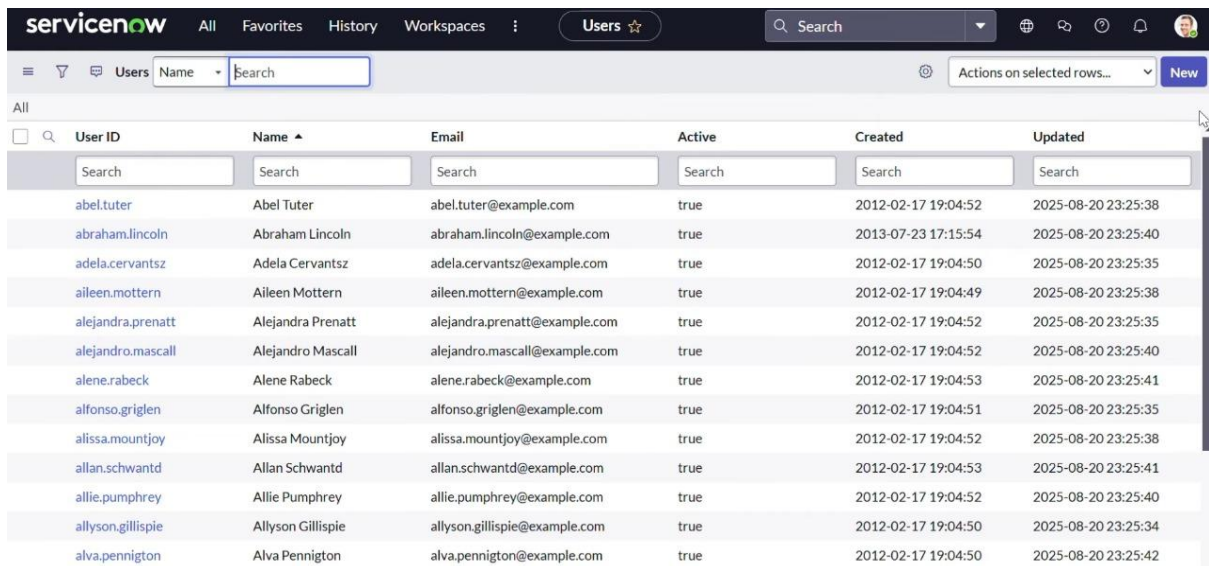
**Account Status:**

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

The 'Update' button is highlighted in the top right corner of the form.

### Method 3: Viewing User Records in ServiceNow:

1. Navigate to User Administration → Users in the ServiceNow application.
2. The User List View displays all existing users along with details such as:
  - User ID
  - Name
  - Email
  - Active Status
  - Created Date
  - Updated Date
3. Use the Search or Filter fields to quickly find a specific user.
4. Click on a User ID to open and view detailed information for that user.
5. This list helps administrators easily manage user accounts and ensure that all active agents are available for automated ticket assignment within support operations.



User ID	Name	Email	Active	Created	Updated
abel.tuter	Abel Tuter	abel.tuter@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:38
abraham.lincoln	Abraham Lincoln	abraham.lincoln@example.com	true	2013-07-23 17:15:54	2025-08-20 23:25:40
adela.cervantsz	Adela Cervantsz	adela.cervantsz@example.com	true	2012-02-17 19:04:50	2025-08-20 23:25:35
aileen.mottern	Aileen Mottern	aileen.mottern@example.com	true	2012-02-17 19:04:49	2025-08-20 23:25:38
alejandra.prenatt	Alejandra Prenatt	alejandra.prenatt@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:35
alejandro.mascall	Alejandro Mascall	alejandro.mascall@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:40
alene.rabeck	Alene Rabeck	alene.rabeck@example.com	true	2012-02-17 19:04:53	2025-08-20 23:25:41
alfonso.griglen	Alfonso Griglen	alfonso.griglen@example.com	true	2012-02-17 19:04:51	2025-08-20 23:25:35
alissa.mountjoy	Alissa Mountjoy	alissa.mountjoy@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:38
allan.schwandt	Allan Schwandt	allan.schwandt@example.com	true	2012-02-17 19:04:53	2025-08-20 23:25:41
allie.pumphrey	Allie Pumphrey	allie.pumphrey@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:40
allyson.gillispie	Allyson Gillispie	allyson.gillispie@example.com	true	2012-02-17 19:04:50	2025-08-20 23:25:34
alva.pennigton	Alva Pennigton	alva.pennigton@example.com	true	2012-02-17 19:04:50	2025-08-20 23:25:42

### Creation of User Fields in ServiceNow for Ticket Assignment:

1. Near Columns, double-click to insert a new row.  
Column label: User ID, Type: String
2. Double-click to insert a new row again.  
Column label: First Name, Type: String
3. Double-click to insert a new row again.  
Column label: Last Name, Type: String
4. Double-click to insert a new row again.  
Column label: Email, Type: String
5. Double-click to insert a new row again.  
Column label: Calendar Integration, Type: Choice (Outlook)
6. Double-click to insert a new row again.  
Column label: Time Zone, Type: String

7. Double-click to insert a new row again.

Column label: Active, Type: Boolean

8. Go to the Header, right-click and click on Save.

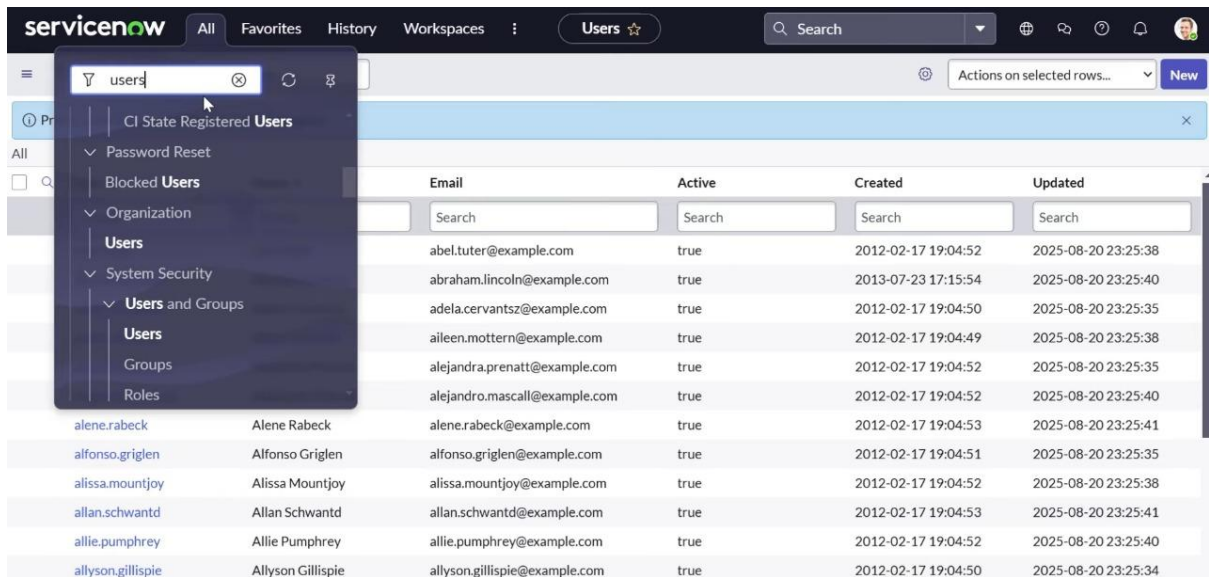
The screenshot shows the ServiceNow 'User - New Record' form. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Admin', and a 'User - New Record' button. A search bar is also present. Below the navigation bar, a breadcrumb trail shows 'User' and 'New record'. A blue notification bar at the top of the form states: 'To set up the User's password, save the record and then click Set Password.' The form is divided into two main sections. The left section contains fields for 'User ID' (katherine.pierce), 'First name' (katherine), 'Last name' (pierce), 'Title' (empty), and 'Department' (empty). Below these are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), 'Web service access only', and 'Internal Integration User'. The right section contains fields for 'Email' (katherine@gmail.com), 'Language' (-- None --), 'Calendar integration' (Outlook), 'Time zone' (System (America/Los Angeles)), 'Date format' (System (yyyy-MM-dd)), 'Business phone', 'Mobile phone', and a 'Photo' link that says 'Click to add...'. A 'Submit' button is located at the bottom left of the form.

## Milestone 4: Viewing and Managing Users:

In this milestone, existing users in ServiceNow are viewed and managed to ensure proper configuration for ticket assignment within support operations. The user list helps administrators verify active agents and maintain accurate user data for smooth workflow automation.

### Steps:

1. In the Application Navigator, type “Users” in the search bar.
2. Navigate to User Administration → Users.
3. The user list view displays key details such as:
  - User ID
  - Name
  - Email
  - Active Status
  - Created and Updated Dates
4. Use the Search or Filter options to find or verify user records.
5. Ensure that all users required for ticket assignment are marked as Active.



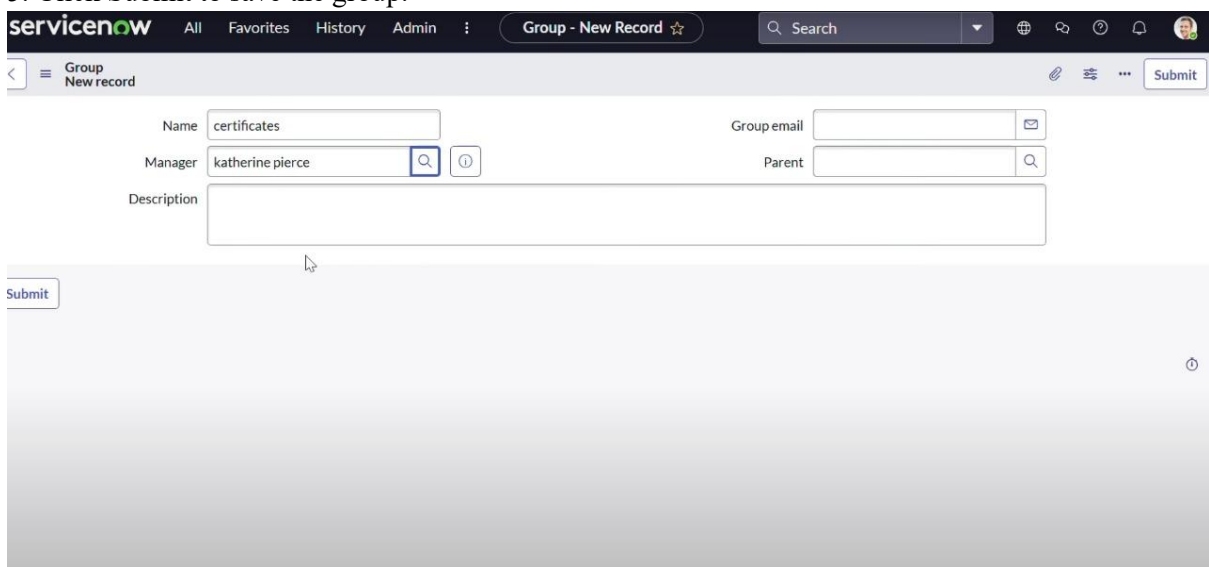
Email	Active	Created	Updated
abel.tuter@example.com	true	2012-02-17 19:04:52	2025-08-20 23:25:38
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allyson.gillispie	true	2012-02-17 19:04:50	2025-08-20 23:25:34

## Milestone 5: Creating and Managing Support Groups:

In this milestone, a new Support Group is created in ServiceNow to organize team members responsible for handling specific ticket categories. Grouping users ensures that incidents and requests are routed efficiently to the right team, improving response time and accountability.

### Steps:

1. Navigate to User Administration → Groups.
2. Click New to create a new record.
3. Enter the group details:
  - o Name: Certificates
  - o Manager: Katherine Pierce
  - o Description: Handles certificate-related tickets and support tasks.
4. Optionally, add a Group Email or Parent Group if needed.
5. Click Submit to save the group.



Group - New Record

Name: certificates

Manager: katherine pierce

Group email:

Parent:

Description:

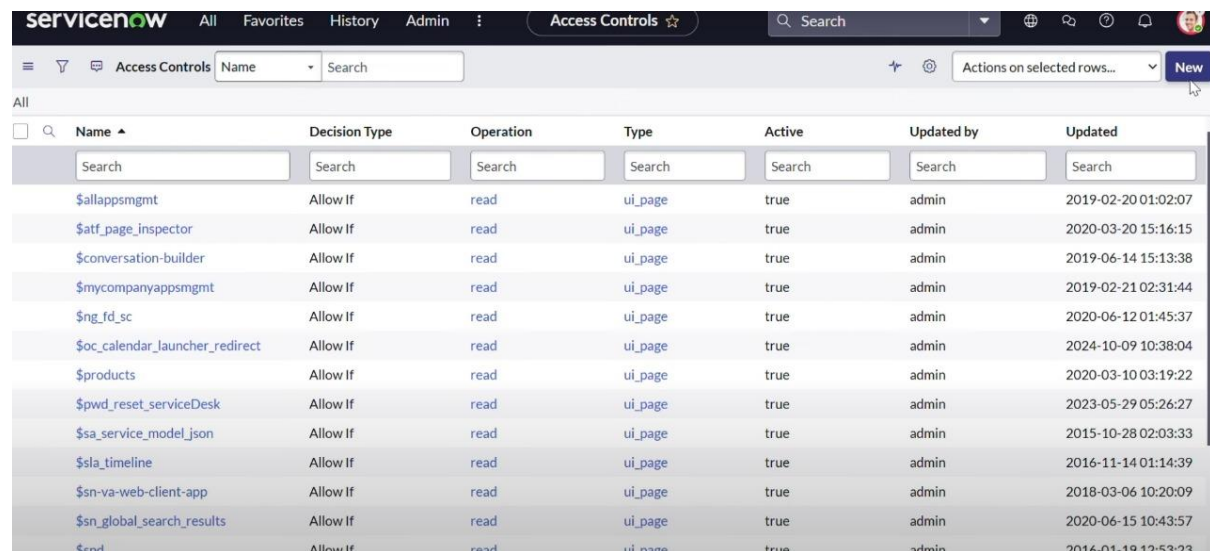
Submit

## Milestone 6: Viewing and Managing Support Groups:

In this milestone, the created support groups are viewed and managed within ServiceNow to ensure proper team organization and accessibility. Each group represents a specific functional area responsible for handling particular ticket types, enabling efficient workload distribution.

### Steps:

1. Navigate to User Administration → Groups.
2. View the existing list of groups such as App Engine Admins, Application Development, etc.
3. Verify that each group has an assigned Manager and is marked as Active.
4. Click New to create additional groups if needed for different support categories.
5. Ensure group details like Name, Description and Manager are clearly defined.



The screenshot shows the ServiceNow interface for Access Controls. The top navigation bar includes 'All', 'Favorites', 'History', 'Admin', and 'Access Controls'. A search bar is present. Below the navigation bar, there's a table with columns: Name, Decision Type, Operation, Type, Active, Updated by, and Updated. The table lists various support groups, each with a unique name starting with a dollar sign, a decision type of 'Allow If', an operation of 'read', a type of 'ui\_page', and an active status of 'true'. The 'Updated by' column shows 'admin' for all entries, and the 'Updated' column shows various timestamps.

Name	Decision Type	Operation	Type	Active	Updated by	Updated
\$allappsmgmt	Allow If	read	ui_page	true	admin	2019-02-20 01:02:07
\$atf_page_inspector	Allow If	read	ui_page	true	admin	2020-03-20 15:16:15
\$conversation-builder	Allow If	read	ui_page	true	admin	2019-06-14 15:13:38
\$mycompanyappsmgmt	Allow If	read	ui_page	true	admin	2019-02-21 02:31:44
\$ng_fd_sc	Allow If	read	ui_page	true	admin	2020-06-12 01:45:37
\$oc_calendar_launcher_redirect	Allow If	read	ui_page	true	admin	2024-10-09 10:38:04
\$products	Allow If	read	ui_page	true	admin	2020-03-10 03:19:22
\$pwd_reset_serviceDesk	Allow If	read	ui_page	true	admin	2023-05-29 05:26:27
\$sa_service_model_json	Allow If	read	ui_page	true	admin	2015-10-28 02:03:33
\$sla_timeline	Allow If	read	ui_page	true	admin	2016-11-14 01:14:39
\$sn-vb-web-client-app	Allow If	read	ui_page	true	admin	2018-03-06 10:20:09
\$sn_global_search_results	Allow If	read	ui_page	true	admin	2020-06-15 10:43:57
\$sod	Allow If	read	ui_page	true	admin	2016-01-19 12:53:23

## Milestone 7: Implementing Access Control for Ticket Operations:

1. Navigate to System Security → Access Control (ACL) in ServiceNow.
2. Click New to create a new Access Control rule.
3. Set the following details:
  - Type: Record
  - Operation: Write
  - Decision Type: Allow If
4. Enable the Admin Overrides checkbox to allow admin users to bypass restrictions if needed.
5. Choose the table operations related [u\_operations\_related] under the Name field.
6. Select the field service request number (or *issue* as needed).
7. Click Submit to save the Access Control configuration.
8. A Verify Security Rules window will appear. Review and confirm the following:
  - Row-level Access: u\_operations\_related
  - Field-level Access: u\_operations\_related.u\_issue
9. Click Continue to apply the security rule.
10. Once saved, verify that only authorized users can edit or update records within the specified table.

servicenow All Favorites History : Access Control - New Record ☆ Search

Access Control New record

\* Type record ⓘ

\* Operation write ⓘ

Decision Type Allow If

Application Global ⓘ

Active ☒

Advanced ☐

Admin overrides ☒

Protection policy -- None --

\* Name operations related [u\_operations\_related] service request number

Description

Applies To No. of records matching the condition: 0 ⓘ

Add Filter Condition Add OR Clause

-- choose field -- -- oper -- -- value --

Conditions

servicenow All Favorites History : Access Control - New Record ☆ Search

Access Control New record

Warning: A role, security attribute, data condition

\* Type record ⓘ

\* Operation write ⓘ

Decision Type Allow If

Application Global ⓘ

Active ☒

Advanced ☐

Admin overrides ☒

Protection policy -- None --

\* Name operations related [u\_operations\_related] issue

Description

Applies To No. of records matching the condition: 0 ⓘ

Add Filter Condition Add OR Clause

-- choose field -- -- oper -- -- value --

Verify Security Rules for "u\_operations\_related.u\_issue"

Write (Allow)

Close

Row level	Field level	
u_operations_related	u_operations_related.u_issue	Adding

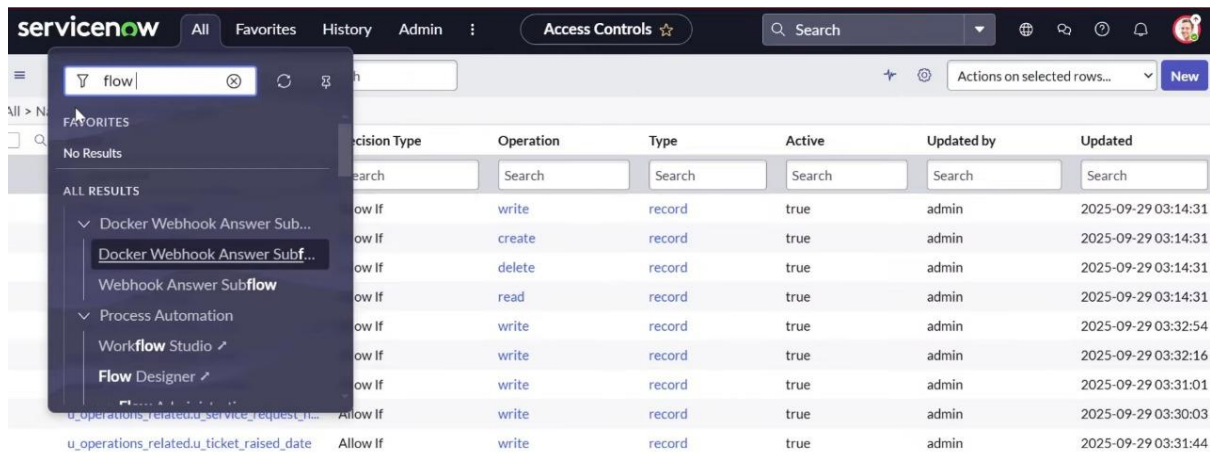
Show All

Cancel Continue

## Milestone 8: Initiating Workflow Automation through Flow Designer:

1. Navigate to the Application Navigator in ServiceNow.
2. In the search bar, type "Flow" to access the Flow Designer under Process Automation.
3. The Flow Designer allows automation of ticket assignment tasks and business processes.
4. It simplifies complex workflows by defining triggers, actions, and conditions for each step.
5. Use Flow Designer to automatically assign tickets based on conditions such as category, priority, or agent availability.
6. Review Access Controls to ensure the necessary permissions are active before running the flow.
7. Click New Flow to begin creating an automated ticket assignment process.
8. Once configured, test the flow to verify that tickets are assigned correctly and efficiently.





## Milestone 9: Conclusion:

The project “Streamlining Ticket Assignment for Efficient Support Operations” focuses on enhancing efficiency and accuracy in ServiceNow by automating the ticket assignment process. Through the use of user management, access control and workflow automation, tickets are intelligently routed to the most suitable support agents based on skills, workload, and availability. This reduces manual effort, minimizes delays and ensures secure and seamless operations. As a result, the support process becomes faster, more reliable and effective—leading to improved productivity, quicker issue resolution, and higher customer satisfaction.