Project Documentation

Streamlining Ticket Assignment for Efficient Support Operations

1. Objective

The purpose of this project is to deploy an automated ticket routing mechanism in **ServiceNow** for **ABC Corporation**. The solution aims to:

- Streamline support workflows and boost operational efficiency.
- Ensure accurate distribution of support tickets to the right teams.
- Minimize delays in resolving customer issues.
- Enhance overall customer experience and satisfaction.
- Maximize the effective use of resources within the support organization.

2. Scope

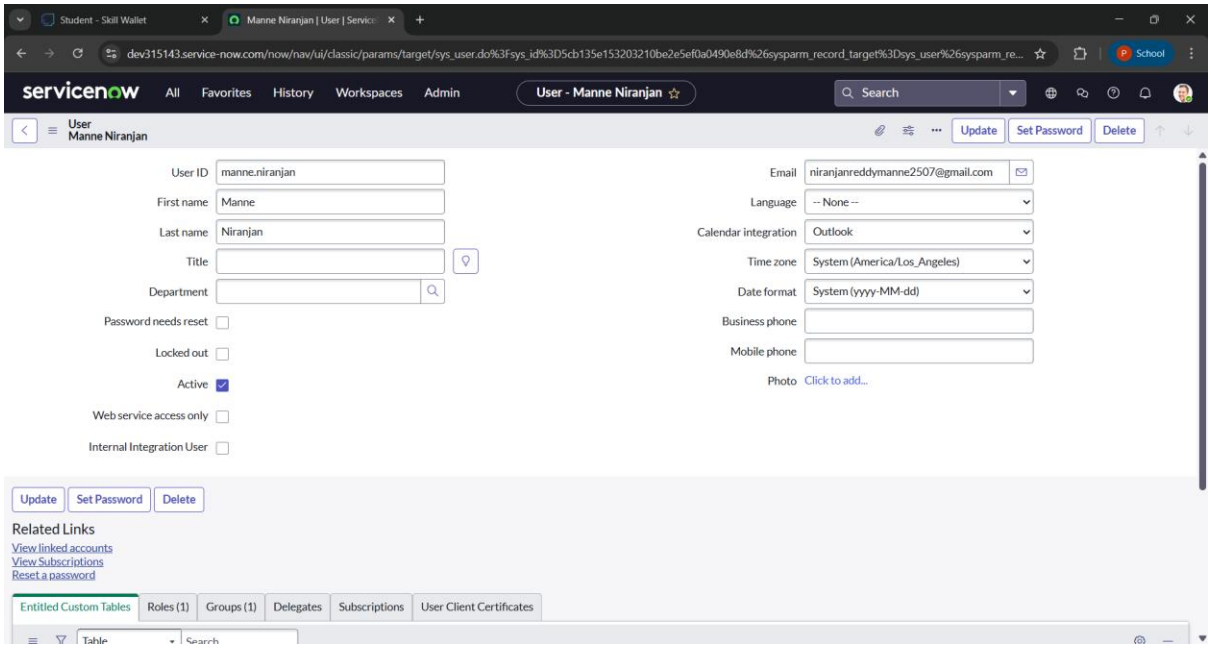
This document outlines the end-to-end configuration steps in **ServiceNow** required to establish the automated routing system. It includes:

- Setting up users, groups, and roles.
- Designing a dedicated operations table.
- Associating users and roles with relevant groups.
- Implementing Access Control Lists (ACLs) to secure data access.
- Developing automated workflows in **Flow Designer** to intelligently assign tickets.

3. Process Workflow

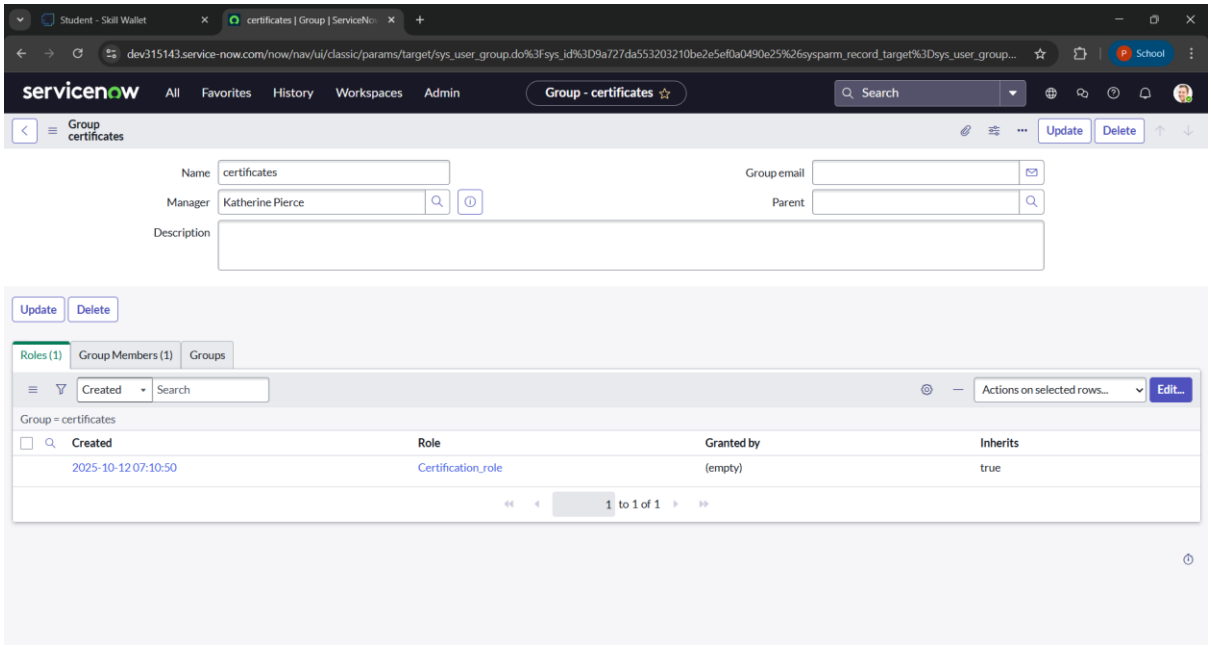
3.1 Create Users

1. Go to **All → Users (System Security)**.
2. Click **New**, enter the necessary details for the user, and click **Submit**.
3. Repeat the steps for any additional users to be created.



3.2 Create Groups

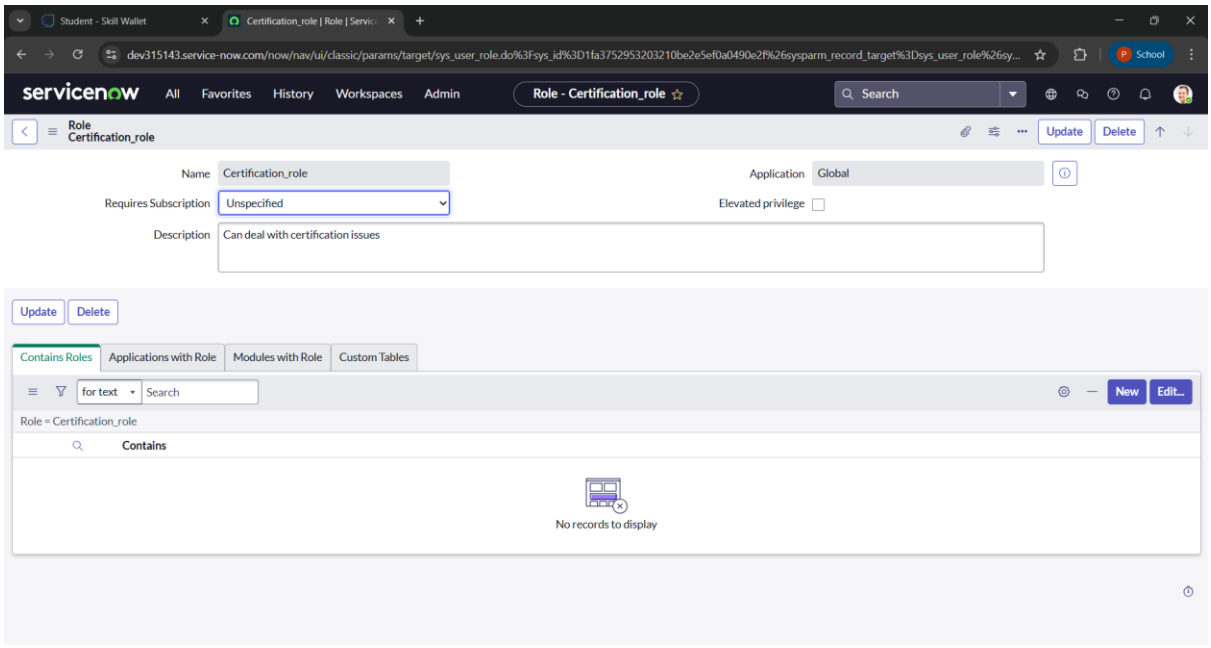
1. Navigate to **All → Groups (System Security)**.
2. Click **New**, provide the group information, and select **Submit**.
3. Follow the same process to add other groups as required.



3.3 Create Roles

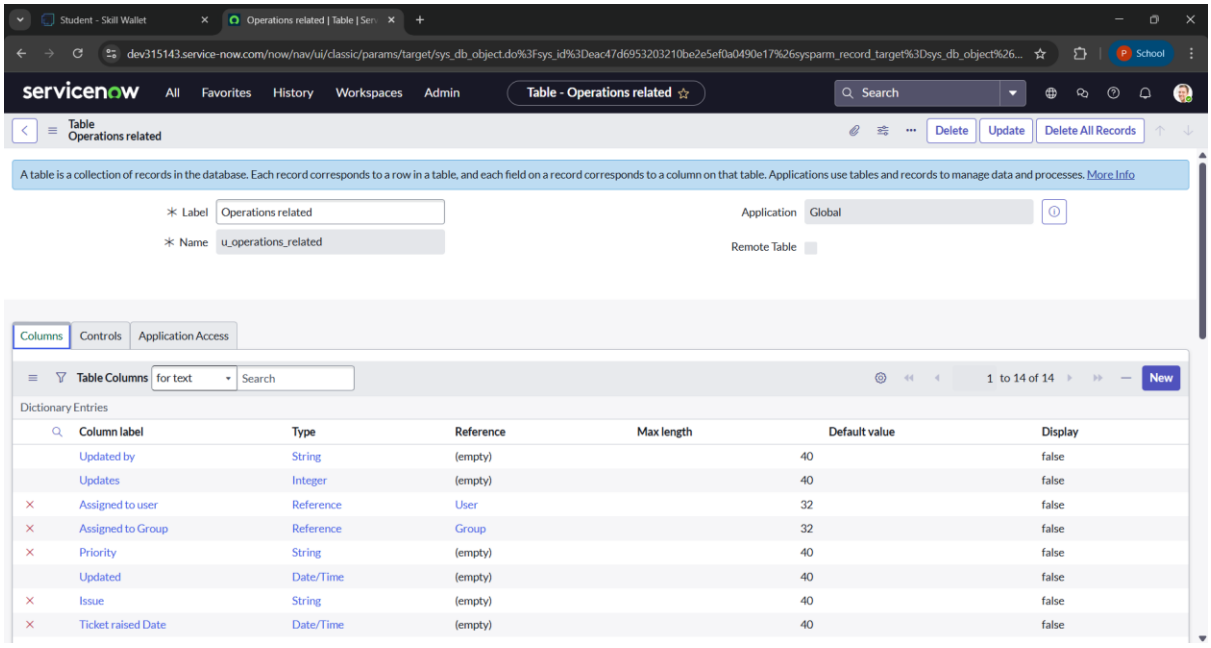
1. Open **All → Roles (System Security)**.
2. Click **New**, enter the role name and description, then click **Submit**.

3. Repeat for any other roles needed.



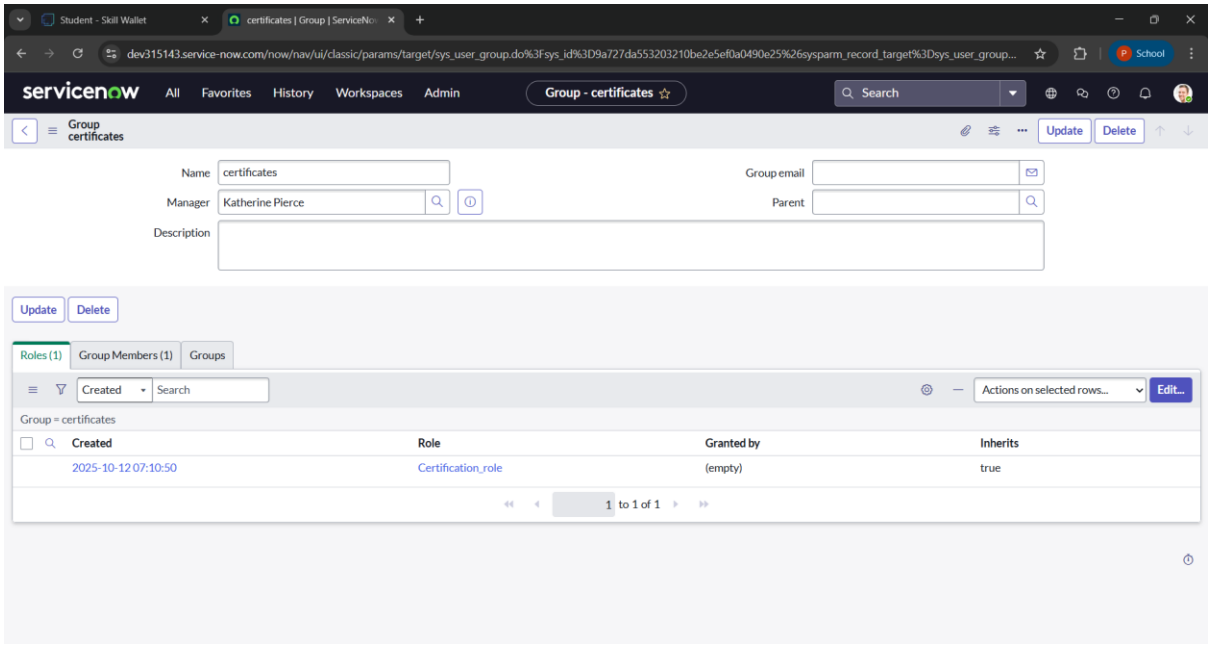
3.4 Create Table

1. Navigate to **All → Tables (System Definition)**.
2. Click **New** and configure as follows:
    - **Label:** Operations Related
    - Enable both **Create module** and **Create mobile module** options.
    - **Menu Name:** Operations Related
    - Add all required fields to the table.
3. Click **Submit**.
4. Define the following options for the **Issue** field:
    - Unable to login to platform
    - 404 error
    - Regarding certificates
    - Regarding user expired
    - Regarding user expired



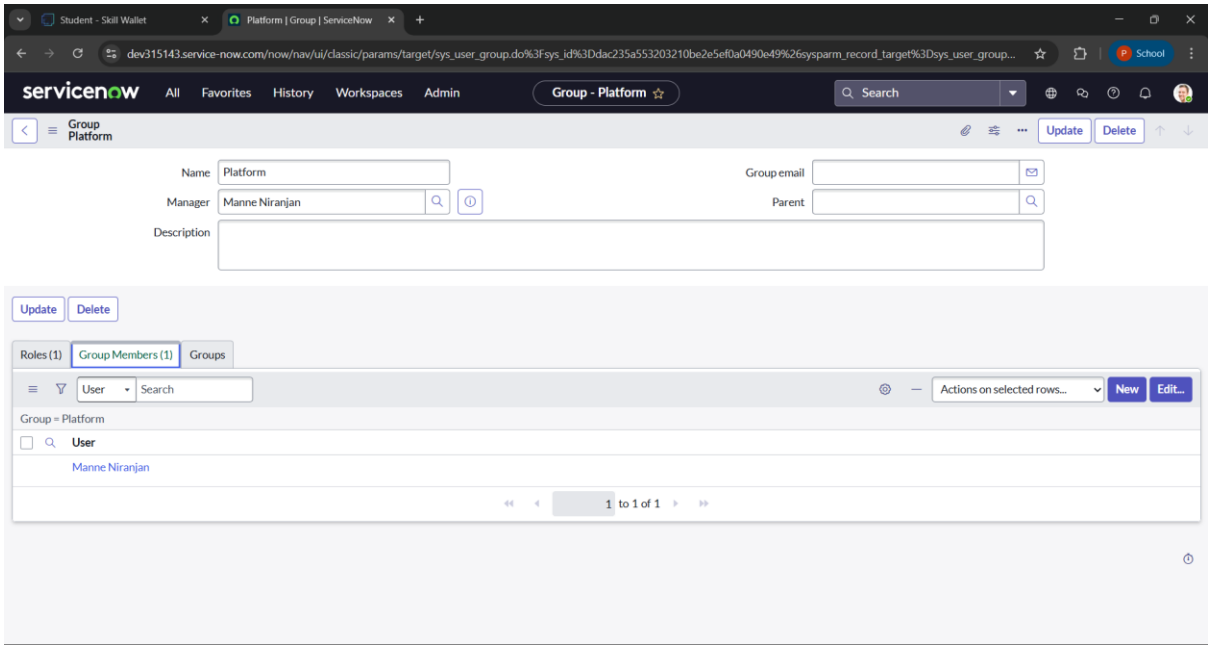
3.5 Assign Roles and Users to Certificates Group

1. Navigate to **All → Tables (System Definition)**.
2. Locate and open the **Certificates Group** record.
3. Under **Roles**, add *Certification_role*.
4. Under **Group Members**, click **Edit** and add *Katherine Pierce*.



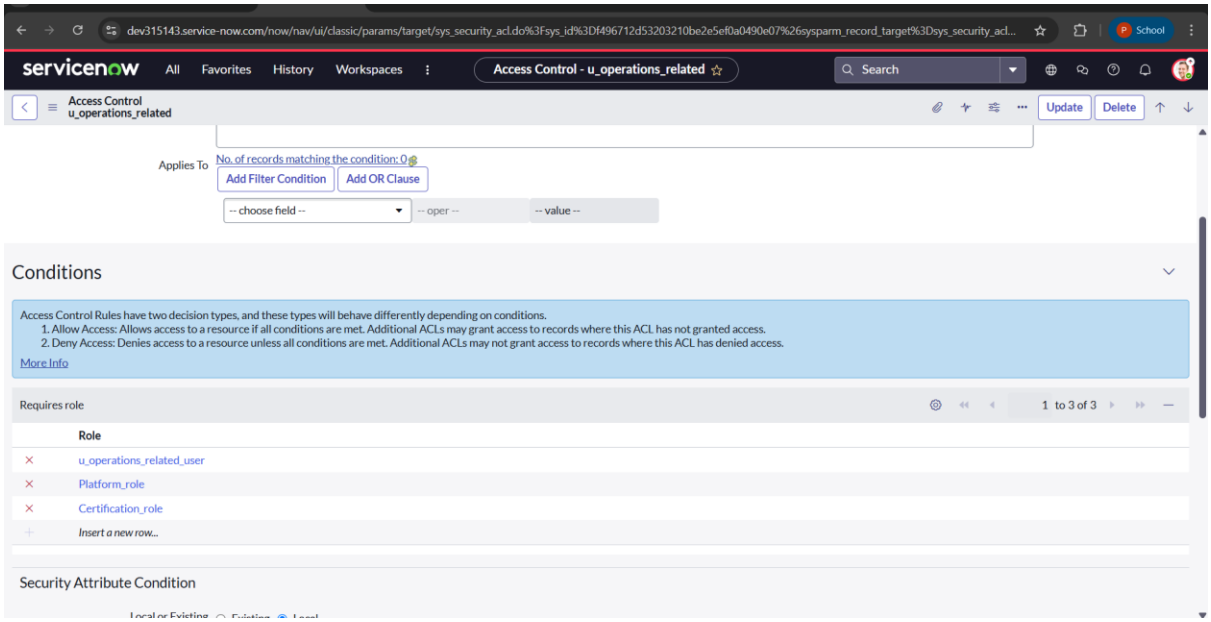
3.6 Assign Roles and Users to Platform Group

1. Navigate to **All → Tables (System Definition)**.
2. Locate and open the **Platform Group** record.
3. Under **Group Members**, click **Edit** and add *Manne Niranjan*.
4. Under **Roles**, add *Platform_role*.



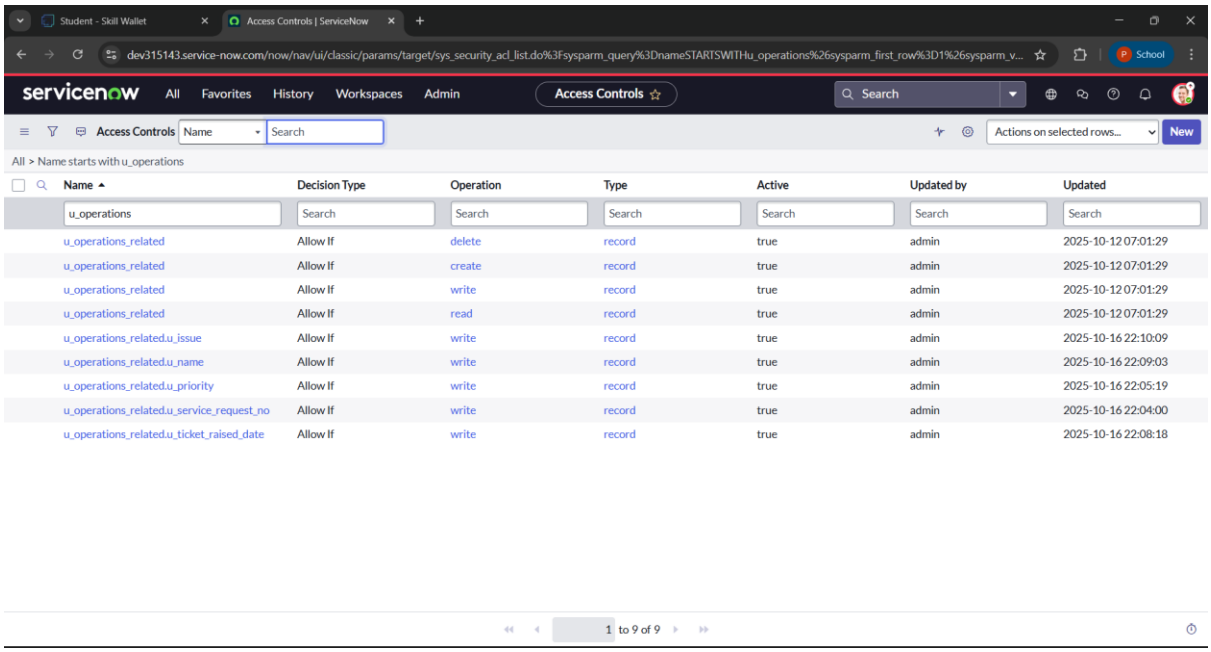
3.7 Assign Roles to Table

1. Open the **Operations Related** table.
2. In **Application Access**, locate **u_operations_related (Read Operation)**.
3. Temporarily elevate privileges to **Security Admin**.
4. Under **Requires Role**, include both **Platform_role** and **Certificate_role**.
5. Repeat the same configuration for the **Write Operation**.



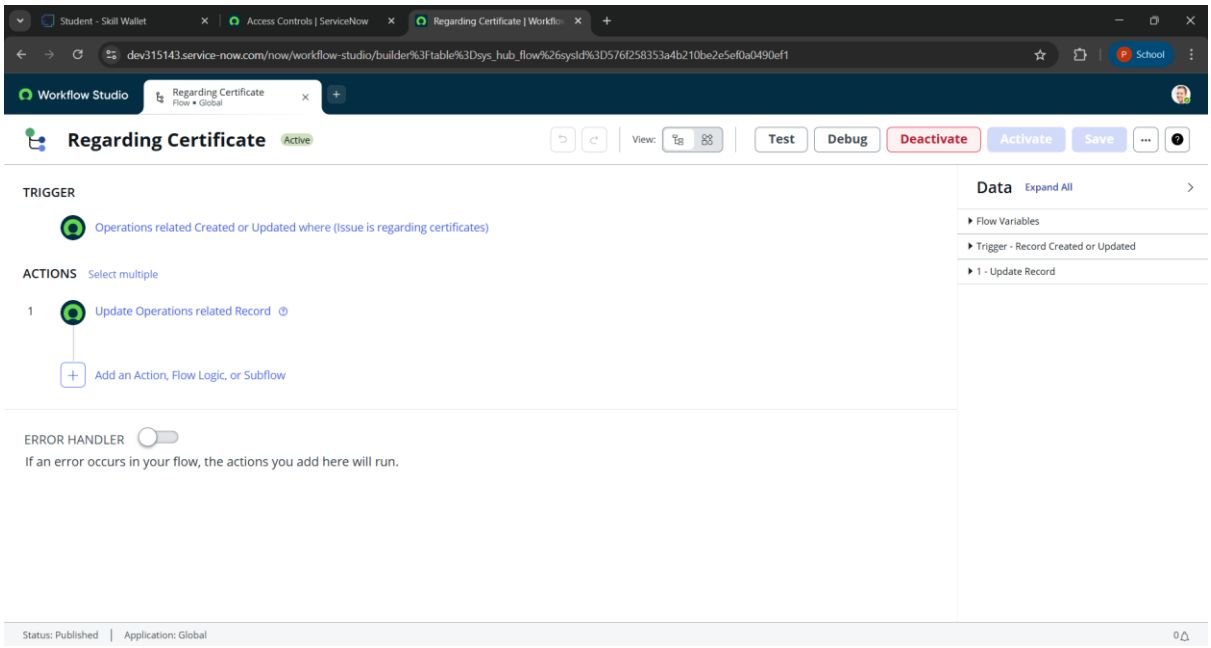
3.8 Create ACL

1. Navigate to **All → Access Control (ACL) (System Security)**.
2. Click **New** to create a new ACL.
3. Under **Requires Role**, add the **admin** role.
4. Click **Submit**.
5. Repeat this process for all four necessary fields to ensure data security.



3.9 Create Flow - Assign Operations Ticket to Certificates Group

1. Open **Flow Designer → New Flow**.
2. Set up the **Flow Properties**:
    - **Flow Name:** Regarding Certificate
    - **Application:** Global
    - **Run As:** System User
3. **Trigger:** When a record is created or updated in the **Operations Related** table, with the condition **Issue = Regarding Certificates**.
4. **Action:** Update the record to set **Assigned to Group = Certificates**.
5. Click **Save** and **Activate** the flow.

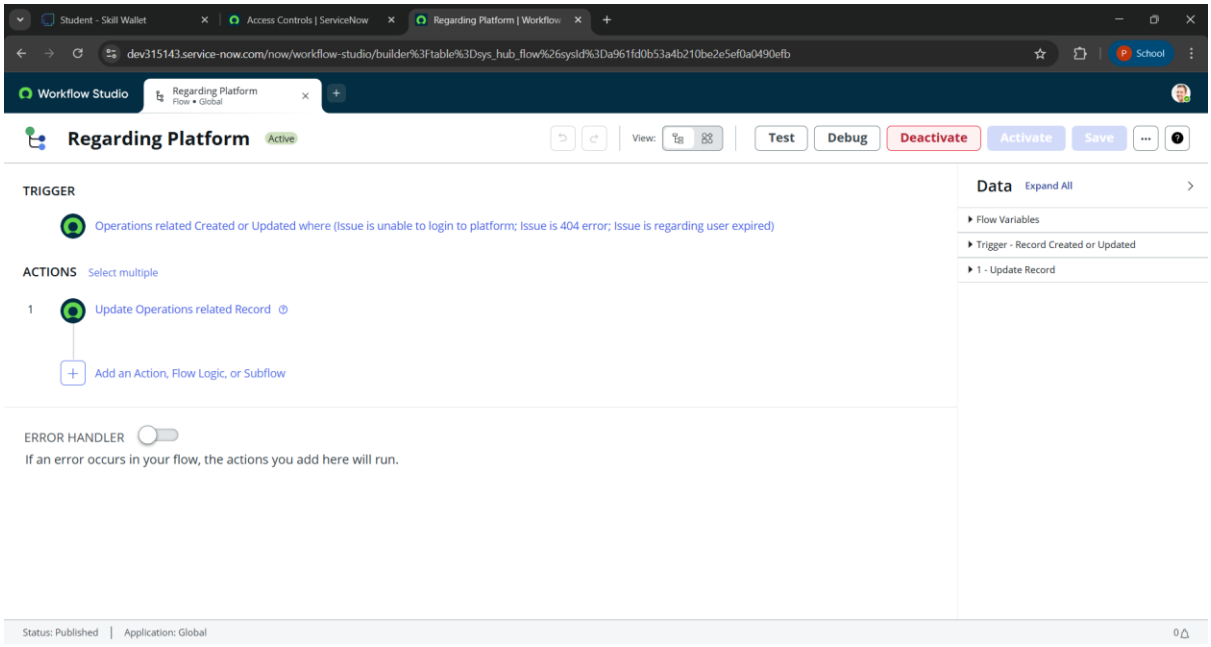


3.10 Create Flow - Assign Operations Ticket to Platform Group

1. Open **Flow Designer → New Flow**.
2. Set up the **Flow Properties**:
    - **Flow Name:** Regarding Platform
    - **Application:** Global
    - **Run As:** System User
3. **Trigger:** When a record is created or updated in the **Operations Related** table, where **Issue** equals any of the following:
    - Unable to login to platform
    - 404 error

- User expired

4. **Action:** Update the record to set **Assigned to Group = Platform**.
5. Click **Save** and **Activate** the flow.



4. Conclusion

The deployment of the automated ticket routing system in **ServiceNow** has markedly enhanced the efficiency of support operations at **ABC Corporation**. The automation removes the need for manual ticket allocation, ensuring that:

- Support issues are routed accurately and promptly.
- Resolution times are reduced.
- Teams focus on their areas of expertise without administrative delays.
- Support resources are used more effectively.
- Customer satisfaction has improved through faster and more reliable responses.