

Project Document

Title: 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

Steps to create users in ServiceNow:

1. Open ServiceNow
2. Navigate to All → Users under *System Security*
3. Click New
4. Fill in required details
5. Click Submit
6. Repeat to create additional users

The screenshot displays the 'User' form in ServiceNow for a user named Katherine Pierce. The form is divided into two main sections: user identification and system configuration. The top bar includes navigation icons and action buttons: 'Update', 'Set Password', and 'Delete'. The left section contains fields for 'User ID' (Katherine.Pierce), 'First name' (Katherine), 'Last name' (Pierce), 'Title' (with a dropdown arrow), and 'Department' (with a search icon). Below these are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), and 'Internal Integration User'. The right section includes fields for 'Email', 'Identity type' (Human), 'Language' (-- None --), 'Calendar integration' (Outlook), 'Time zone' (System (America/Los_Angeles)), 'Date format' (System (yyyy-MM-dd)), 'Business phone', and 'Mobile phone'. A 'Photo' field with a 'Click to add...' link is at the bottom right. At the bottom left, there are 'Update', 'Set Password', and 'Delete' buttons, followed by a 'Related Links' section with links to 'View linked accounts', 'View subscriptions', and 'Reset a password'.

Field	Value
User ID	Katherine.Pierce
First name	Katherine
Last name	Pierce
Title	
Department	
Password needs reset	<input type="checkbox"/>
Locked out	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Internal Integration User	<input type="checkbox"/>
Email	
Identity type	Human
Language	-- None --
Calendar integration	Outlook
Time zone	System (America/Los_Angeles)
Date format	System (yyyy-MM-dd)
Business phone	
Mobile phone	
Photo	Click to add...

Update Set Password Delete

Related Links
[View linked accounts](#)
[View subscriptions](#)
[Reset a password](#)

The screenshot shows the 'User' form in ServiceNow for a user named 'Manne'. The form is divided into two main sections. The left section contains fields for 'User ID' (manne.niranjan), 'First name' (Manne), 'Last name' (empty), 'Title' (empty), and 'Department' (empty). Below these are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), and 'Internal Integration User'. The right section contains fields for 'Email' (empty), 'Identity type' (Human), 'Language' (--None--), 'Calendar integration' (Outlook), 'Time zone' (System (America/Los Angeles)), 'Date format' (System (yyyy-MM-dd)), 'Business phone' (empty), 'Mobile phone' (empty), and 'Photo' (Click to add...). At the bottom left, there are buttons for 'Update', 'Set Password', and 'Delete', followed by a 'Related Links' section with links for 'View linked accounts', 'View Subscriptions', and 'Reset a password'.

2.2 Create Groups

1. Open ServiceNow
2. Navigate to All → Groups under *System Security*
3. Click New
4. Fill in required details
5. Click Submit
6. Repeat to create additional groups

The first screenshot shows the 'Group' form in ServiceNow for a group named 'platform'. The form has fields for 'Name' (platform), 'Manager' (Manne), 'Group email' (empty), and 'Parent' (empty). There is a large 'Description' text area. At the bottom, there are buttons for 'Update' and 'Delete'. The second screenshot shows the 'Group' form in ServiceNow for a group named 'certificates'. The form has fields for 'Name' (certificates), 'Manager' (Katherine Pierce), 'Group email' (empty), and 'Parent' (empty). There is a large 'Description' text area. At the bottom, there are buttons for 'Update' and 'Delete'.

2.3 Create Roles

1. Open ServiceNow
2. Navigate to All → Roles under *System Security*
3. Click New
4. Provide role details

5. Click Submit
6. Repeat for additional roles

This screenshot shows a form for creating a role named 'Certification_role'. The form is titled 'Role Certification_role' and includes a header bar with 'Update' and 'Delete' buttons. The main form area contains the following fields:

- Name:** Certification_role
- Application:** Global
- Elevated privilege:** ☐
- Description:** Can deal with certification issues

At the bottom of the form, there are 'Update' and 'Delete' buttons.

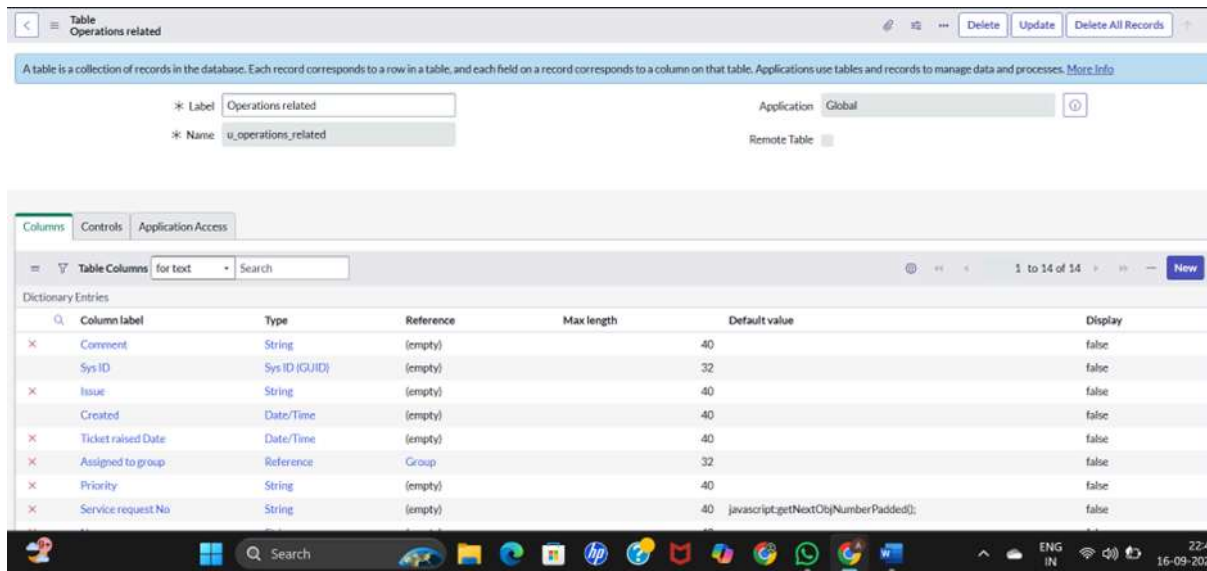
This screenshot shows a form for creating a role named 'Platform_role'. The form is titled 'Role Platform_role' and includes a header bar with 'Update' and 'Delete' buttons. The main form area contains the following fields:

- Name:** Platform_role
- Application:** Global
- Elevated privilege:** ☐
- Description:** Can deal with platform realted issues

At the bottom of the form, there are 'Update' and 'Delete' buttons.

2.4 Create Table

1. Open ServiceNow
2. Navigate to All → Tables under *System Definition*
3. Click New
4. Enter:
 - Label: Operations Related
 - Check: *Create module & Create mobile module*
 - Menu name: Operations Related
 - Define columns as needed
5. Click Submit



Column label	Type	Reference	Max length	Default value	Display
Created by	String	(empty)	40		false
Created	Date/Time	(empty)	40		false
Sys ID	Sys ID (GUID)	(empty)	32		false
Updates	Integer	(empty)	40		false
Updated by	String	(empty)	40		false
Updated	Date/Time	(empty)	40		false
Assigned to group	Reference	Group	40		false
Assigned to user	Reference	User	32		false
Comment	String	(empty)	40		false
Issue	String	(empty)	40		false
Name	String	(empty)	40		false
Priority	String	(empty)	40		false
Service request No	String	(empty)	40	javascript:getNextObjNumberPadded();	false
Ticket raised Date	Date/Time	(empty)	40		false
Insert a new row...					

2.5 Create Choices for Issue Field

Choices configured:

- Unable to login to platform
- 404 error
- Regarding certificates
- Regarding user expired

3. Role and Group Assignments

3.1 Assign Roles & Users to Certificate Group

- Add Katherine Pierce as group member
- Assign Certification_role

< Group certificates Update Delete

Name: certificates Group email:

Manager: Katherine Pierce Parent:

Description:

Update Delete

Roles (1) GroupMembers (1) Groups

Created Search Actions on selected rows... Edit...

Group - certificates

	Created	Role	Granted by	Inherits
<input type="checkbox"/>	2025-09-05 06:52:27	Certification_role	(empty)	true

1 to 1 of 1

< Group certificates Update Delete

Name: certificates Group email:

Manager: Katherine Pierce Parent:

Description:

Update Delete

Roles (1) GroupMembers (1) Groups

User Search Actions on selected rows... New Edit...

Group - certificates

	User
<input type="checkbox"/>	Katherine Pierce

1 to 1 of 1

3.2 Assign Roles & Users to Platform Group

- Add Manne Niranjan as group member
- Assign Platform_role

< Group platform Update Delete

Name: platform Group email:

Manager: Manne Parent:

Description:

Update Delete

Roles (1) GroupMembers (1) Groups

User Search Actions on selected rows... New Edit...

Group - platform

	User
<input type="checkbox"/>	Manne

1 to 1 of 1

Group platform

Name: platform

Manager: Manne

Description:

Group email:

Parent:

Update Delete

Roles (1) Group Members (1) Groups

Created Search

Group = platform

Created	Role	Granted by	Inherits
2025-09-05 06:53:50	Platform_role	(empty)	true

1 to 1 of 1

3.3 Assign Role to Table

1. Navigate to the Operations Related table
2. Update *Application Access* with required roles:
 - Platform_role
 - Certification_role
3. Configure for both *Read* and *Write* operations

Access Control u_operations_related

Type: record

Operation: read

Decision Type: Allow if

Admin overrides:

Protection policy: None

Name: u_operations_related

Description: Default access control on u_operations_related

Applies to: No. of records matching the condition: 0 (empty)

Application: Global

Active: ☒

Advanced: ☐

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

1. Allow Access: Allows access to a resource if all conditions are met. Additional ACLs may grant access to records where this ACL has not granted access.

2. Deny Access: Denies access to a resource unless all conditions are met. Additional ACLs may not grant access to records where this ACL has denied access.

More info

Requires role

Role
Platform_role
Certification_role
u_operations_related_user

1 to 3 of 3

Access Control: u_operations_related

Type: record

Operation: write

Decision Type: Allow If

Admin overrides: ☒

Protection policy: -- None --

Name: u_operations_related

Description: Default access control on u_operations_related

Applies To: No of records matching the condition: 0 (empty)

Application: Global

Active: ☒

Advanced: ☐

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

1. Allow Access: Allows access to a resource if all conditions are met. Additional ACLs may grant access to records where this ACL has not granted access.

2. Deny Access: Denies access to a resource unless all conditions are met. Additional ACLs may not grant access to records where this ACL has denied access.

Requires role

1 to 3 of 3

Role

Platform role

u_operations_related_user

Certification role

4. Access Control (ACL) Creation

1. Navigate to All → ACL under *System Security*
2. Click New
3. Configure ACL with admin role under *Requires Role*
4. Create 4 ACL entries for specific fields as required

Access Control: u_operations_related.u_service_request_no

Type: record

Operation: write

Admin overrides: ☒

Protection policy: -- None --

Name: Operations related [u_operations_related] Service request No

Description:

Condition: 4 records match condition

Add Filter Condition Add "OR" Clause

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

Application: Global

Active: ☒

Advanced: ☐

Update Delete

servicenow All Favorites History Workspaces Admin Access Controls

Access Controls Updated Search

Name	Decision Type	Operation	Type	Active	Updated by
u_operations_related.u_priority	Allow If	write	record	true	admin
u_operations_related.u_ticket_raised_date	Allow If	write	record	true	admin
u_operations_related.u_name	Allow If	write	record	true	admin
u_operations_related.u_issue	Allow If	write	record	true	admin
u_operations_related.u_service_request_no	Allow If	write	record	true	admin

5. Flow Automation

5.1 Flow for Certificate Group

- Flow Name: Regarding Certificate
- Trigger: Create or update record in *Operations Related* table
- Condition: Issue = "Regarding Certificates"
- Action: Update record → Assign to group = Certificates

Workflow Studio Regarding Certificate

TRIGGER

Operations related Created or Updated where (Issue is regarding certificates)

Trigger: Created or Updated Table

Table: Operations related [u_operation...]

Condition: All of these conditions must be met

Issue is regarding certificates

Run Trigger: For every update

Advanced Options

Delete Cancel Done

Data Collapse All

- Flow Variables
- Trigger - Record Created or Updated
 - Operations related Record
 - Changed Fields
 - Operations related Table
 - Run Start Time UTC
 - Run Start DateTime
- 1 - Update Record
 - Operations related Record
 - Operations related Table
 - Action Status

Workflow Studio Regarding Certificate

TRIGGER

Operations related Created or Updated where (Issue is regarding certificates)

ACTIONS Select multiple

1 Update Operations related Record

Action Properties

Action: Update Record

Action Inputs

Record: trigger - Operations related

Table: Operations related [u_operation...]

Fields: Assigned to group certificates

+ Add field value

Delete Cancel Done

Data Collapse All

- Flow Variables
- Trigger - Record Created or Updated
 - Operations related Record
 - Changed Fields
 - Operations related Table
 - Run Start Time UTC
 - Run Start DateTime
- 1 - Update Record
 - Operations related Record
 - Operations related Table
 - Action Status

Workflow Studio Regarding Certificate

TRIGGER

Operations related Created or Updated where (Issue is regarding certificates)

ACTIONS Select multiple

1 Update Operations related Record

+ Add an Action, Flow Logic, or Subflow

ERROR HANDLER

If an error occurs in your flow, the actions you add here will run.

Data Collapse All

- Flow Variables
- Trigger - Record Created or Updated
 - Operations related Record
 - Changed Fields
 - Operations related Table
 - Run Start Time UTC
 - Run Start DateTime
- 1 - Update Record
 - Operations related Record
 - Operations related Table
 - Action Status

5.2 Flow for Platform Group

- Flow Name: Regarding Platform
- Trigger: Create or update record in *Operations Related* table
- Conditions:
 - Issue = Unable to login to platform
 - Issue = 404 Error
 - Issue = User expired
- Action: Update record → Assign to group = Platform

The screenshot shows the 'Regarding Platform' workflow configuration in Workflow Studio. The trigger is set to 'Created or Updated' for the 'Operations related' table. The condition is configured with three rows, each with an 'OR' operator. The first row is 'Issue is regarding user expired', the second is 'Issue is 404 error', and the third is 'Issue is unable to login to platform'. The 'Run Trigger' is set to 'Once'. The 'Data' panel on the right shows the flow variables and the trigger record.

Workflow Studio: Regarding Platform

Trigger: Created or Updated

Table: Operations related [u_operation...]

Condition: All of these conditions must be met

- Issue is regarding user expired
- OR
- Issue is 404 error
- OR
- Issue is unable to login to platform
- OR
- New Criteria

Run Trigger: Once

Advanced Options

Data

- Flow Variables
- Trigger - Record Created or Updated
 - Operations related Record
 - Changed Fields
 - Operations related Table
 - Run Start Time UTC
 - Run Start Date/Time
- 1 - Update Record
 - Operations related Record
 - Operations related Table
 - Action Status

The screenshot shows the 'Regarding Platform' workflow configuration in Workflow Studio, specifically the action configuration. The action is 'Update Record' for the 'Operations related' table. The 'Record' is set to 'Trigger - Operations related'. The 'Table' is 'Operations related [u_operation...]' and the 'Fields' are 'Assigned to group' and 'platform'. The 'Data' panel on the right shows the flow variables and the trigger record.

Workflow Studio: Regarding Platform

Actions: Select multiple

1. Update Operations related Record

Action Properties

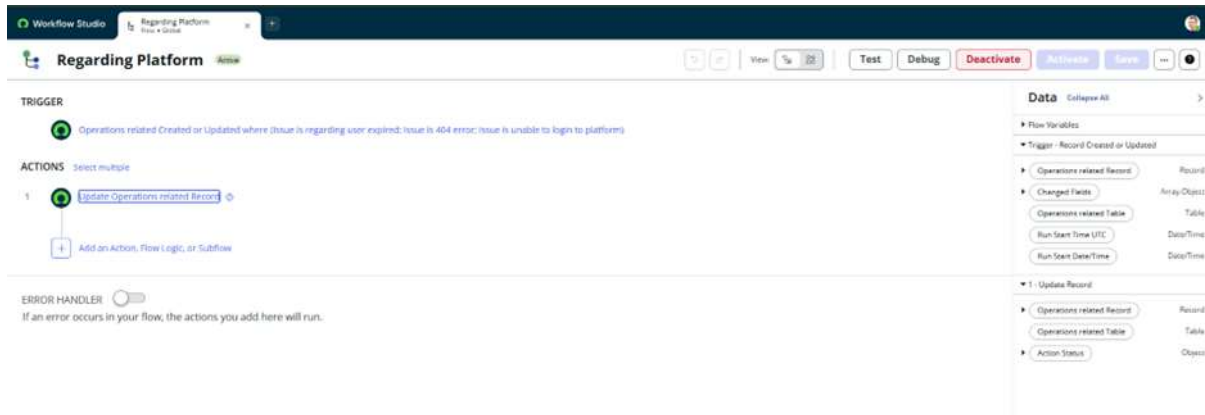
Action: Update Record

Action Inputs

- Record: Trigger - Operations related
- Table: Operations related [u_operation...]
- Fields: Assigned to group, platform
- + Add field value

Data

- Flow Variables
- Trigger - Record Created or Updated
 - Operations related Record
 - Changed Fields
 - Operations related Table
 - Run Start Time UTC
 - Run Start Date/Time
- 1 - Update Record
 - Operations related Record
 - Operations related Table
 - Action Status



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

servicenow All Favorites History Workspaces Admin Operations related Search								
Operations related Name Search Actions on selected rows... New								
All	Name	Assigned to group	Assigned to user	Comment	Issue	Priority	Service request No	Ticket raised Date
<input type="checkbox"/>	(empty)	platform	(empty)		regarding user expired			(empty)
	(empty)	certificates	(empty)		regarding certificates			(empty)
	(empty)	platform	(empty)		unable to login to platform			(empty)
	(empty)	platform	(empty)		404 error			(empty)
	(empty)	certificates	(empty)		regarding certificates			(empty)
	(empty)	platform	(empty)		404 error			(empty)
	(empty)	platform	(empty)		regarding user expired			(empty)
	(empty)	platform	(empty)		unable to login to platform			(empty)