

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 form for 'User - Katherine Pierce'. The form fields include:

| User ID | Katherine Pierce | Email |
|---------------------------|-------------------------------------|----------------------|
| First name | Katherine | Language |
| Last name | Pierce | Calendar integration |
| Title | | Time zone |
| Department | | Date format |
| Password needs reset | <input type="checkbox"/> | Business phone |
| Locked out | <input type="checkbox"/> | Mobile phone |
| Active | <input checked="" type="checkbox"/> | Photo |
| Web service access only | <input type="checkbox"/> | Click to add... |
| Internal Integration User | <input type="checkbox"/> | |

Below the form are 'Related Links' for View linked accounts, View Subscriptions, and Reset a password. At the bottom, there are tabs for Entitled Custom Tables, Roles, Groups, Delegates, Subscriptions, and User Client Certificates. The status bar at the bottom shows weather (30°C, Mostly cloudy), system info (ENG IN), and date/time (25-06-2025, 12:22).

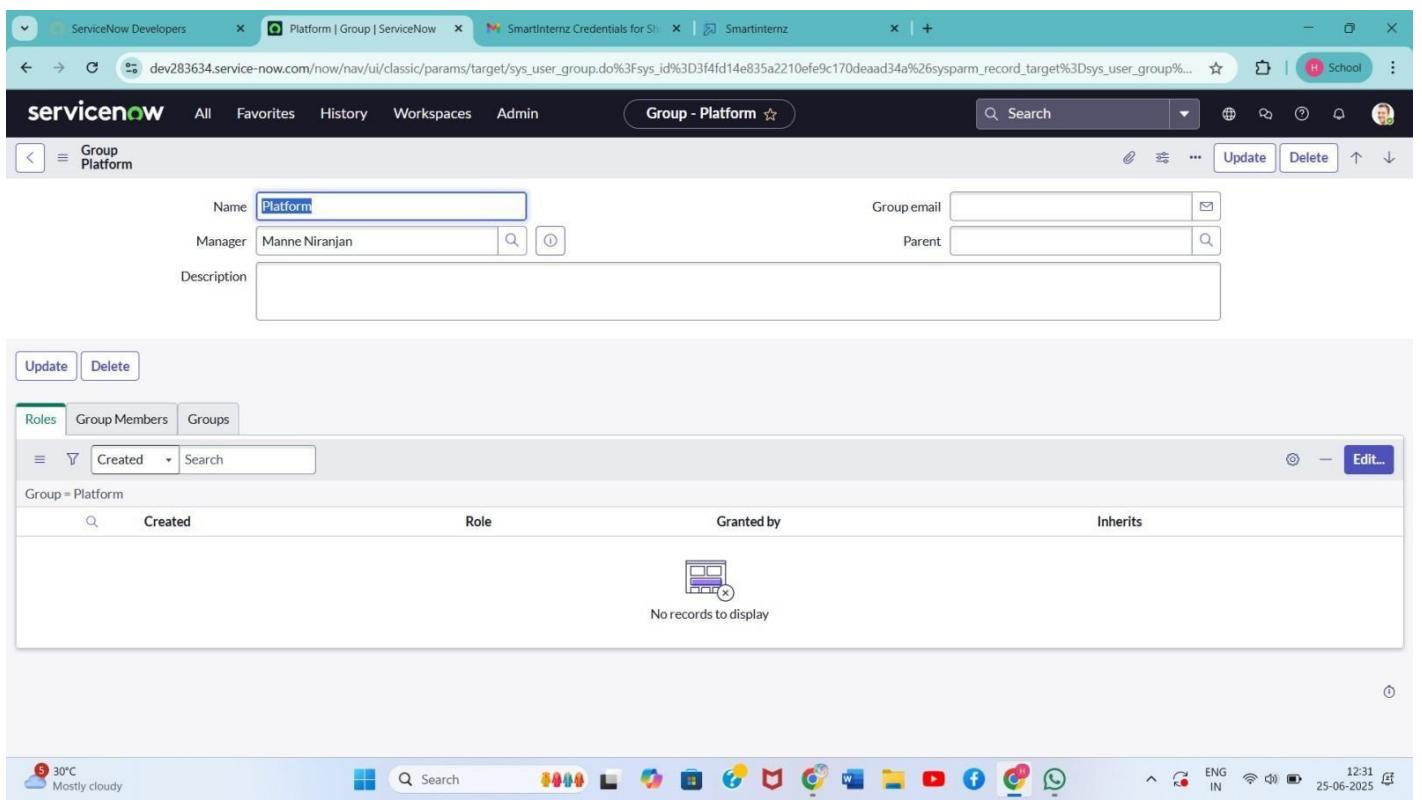
The screenshot shows the ServiceNow User creation interface. The User ID is set to "Katherine Pierce". Other fields include First name ("Katherine"), Last name ("Pierce"), Title (empty), Department (empty), Password needs reset (unchecked), Locked out (unchecked), Active (checked), Web service access only (unchecked), and Internal Integration User (unchecked). On the right, there are fields for Email, Language (set to "None"), Calendar integration (set to "Outlook"), Time zone (set to "System (America/Los_Angeles)"), Date format (set to "System (yyyy-MM-dd)"), Business phone (empty), and Mobile phone (empty). A "Photo" field with a "Click to add..." link is also present. At the bottom left are "Update", "Set Password", and "Delete" buttons.

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.

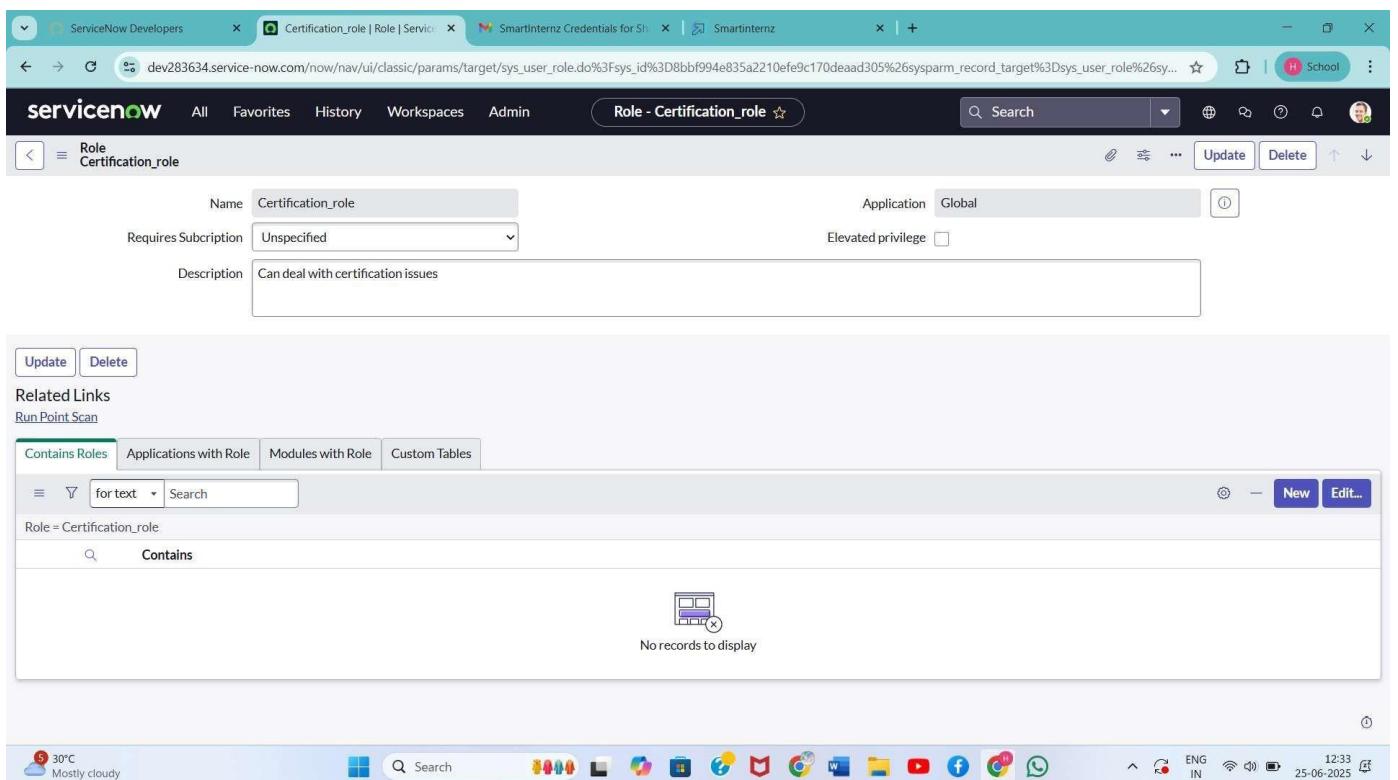
The screenshot shows the ServiceNow Group creation interface for a group named "certificates". The Manager is listed as "Katherine Pierce". There is a large empty "Description" field. On the right, there are fields for "Group email" (empty) and "Parent" (empty). At the bottom left are "Update" and "Delete" buttons. Below the main form is a table titled "Group = certificates" with columns for "Created", "Role", "Granted by", and "Inherits". The table shows one record: a user icon with the text "No records to display". The bottom navigation bar includes "Roles", "Group Members", and "Groups" tabs, along with a search bar and an "Edit..." button. The status bar at the bottom shows weather (30°C, mostly cloudy), system icons, and the date/time (25-06-2025, 12:22).



The screenshot shows the ServiceNow interface for creating a new group. The title bar includes tabs for 'ServiceNow Developers', 'Platform | Group | ServiceNow', 'Smartinternz Credentials for Si...', and 'Smartinternz'. The main navigation bar has links for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current page is 'Group - Platform' with a star icon. The top form fields include 'Name' (Platform), 'Manager' (Manne Nirjanan), 'Group email' (empty), and 'Parent' (empty). Below the form is a 'Description' field and a note indicating 'No records to display'. At the bottom are 'Update' and 'Delete' buttons.

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 title bar includes tabs for 'ServiceNow Developers', 'Certification_role | Role | ServiceNow', 'Smartinternz Credentials for Si...', and 'Smartinternz'. The main navigation bar has links for 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current page is 'Role - Certification_role' with a star icon. The top form fields include 'Name' (Certification_role), 'Requires Subscription' (Unspecified), 'Application' (Global), and 'Elevated privilege' (unchecked). Below the form is a 'Description' field containing 'Can deal with certification issues'. At the bottom are 'Update' and 'Delete' buttons. A 'Related Links' section includes a 'Run Point Scan' link. The 'Contains Roles' section shows 'No records to display'.

The screenshot shows the ServiceNow interface for creating a new role. The top navigation bar includes tabs for ServiceNow Developers, Platform_role | Role | ServiceNo, Smartinternz Credentials for Sh..., and Smartinternz. The main title is "Role - Platform_role". The "Name" field is set to "Platform_role", "Application" is "Global", and the "Description" field contains "Can deal with platform related issues". There are "Update" and "Delete" buttons at the top right. Below the form is a "Related Links" section with a search bar and a table showing results for "Role = Platform_role". The table has columns for Contains Roles, Applications with Role, Modules with Role, and Custom Tables. A message "No records to display" is shown.

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 configuring 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), search, and system icons.

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 page displays 'Conditions' and 'Requires role' sections. Under 'Conditions', it says: 'Access Control Rules allow access to the specified resource if all four of these checks evaluate to true.' It lists four conditions: 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. Below this, it says 'The four checks are evaluated independently in the order displayed above.' A 'More Info' link is present. The 'Requires role' section lists 'Role' with options: 'Certification_role', 'Platform_role', and 'u_operations_related_user'. The status bar at the bottom shows weather (SL - BAN Live), search, and system icons.

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 evaluate access based on four checks. It also includes a "More Info" link and a "Requires role" section listing the "Role" field which contains "admin".

| 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 current page is 'Regarding Certificate | Workflow'. The main area displays a flow named 'Regarding Certificate' which is active. The flow consists of one trigger and one action:

- Trigger:** Operations related Created or Updated where (Issue is regarding certificates)
- Action:** Update Operations related Record

The 'Update Operations related Record' action has the following configuration:

- Action: Update Record
- Record: Trigger ... Operations relate...
- Table: Operations related [u_operation...]
- Fields:
 - Assigned to group: certificates
 - Assigned to user: Katherine Pierce

On the right side of the screen, there is a sidebar titled 'Data' with a 'Collapse All' button. It lists various flow variables and actions, such as 'Trigger - Record Created or Updated', 'Operations related Record', 'Changed Fields', 'Run Start Time UTC', 'Run Start Date/Time', '1 - Update Record', and 'Action Status'. The 'Data' sidebar also includes sections for 'Record', 'Table', and 'Object'.

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 record types.

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 the ServiceNow classic UI with a search bar at the top. A new record is being created in the "Operations related" table, specifically for "Vega". The fields filled in the form are:

| | |
|--------------------|-----------------------------|
| 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 of the form, there are "Update" and "Delete" buttons. The status bar at the bottom indicates it's 10:43 AM on June 26, 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.