Project Title : Streamlining Ticket Assignment for Efficient Support Operations

Team Id: NM2025TMID19141

Team Members:

Team Leader: Sugasri S

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Problem Statement:

At ABC Corporation, support tickets were previously routed manually, leading to delays, misassignments, and inefficiencies in issue resolution. This manual process not only consumed valuable operator time but also impacted service quality and customer satisfaction. There was a clear need for an automated solution to streamline ticket routing, reduce errors, and improve overall support efficiency.

Objective:

The objective of this project is to design and implement an automated ticket routing system in ServiceNow that ensures support tickets are intelligently assigned to the correct teams based on predefined rules. This aims to reduce manual intervention, improve efficiency of support operations, accelerate issue resolution, and enhance customer satisfaction.
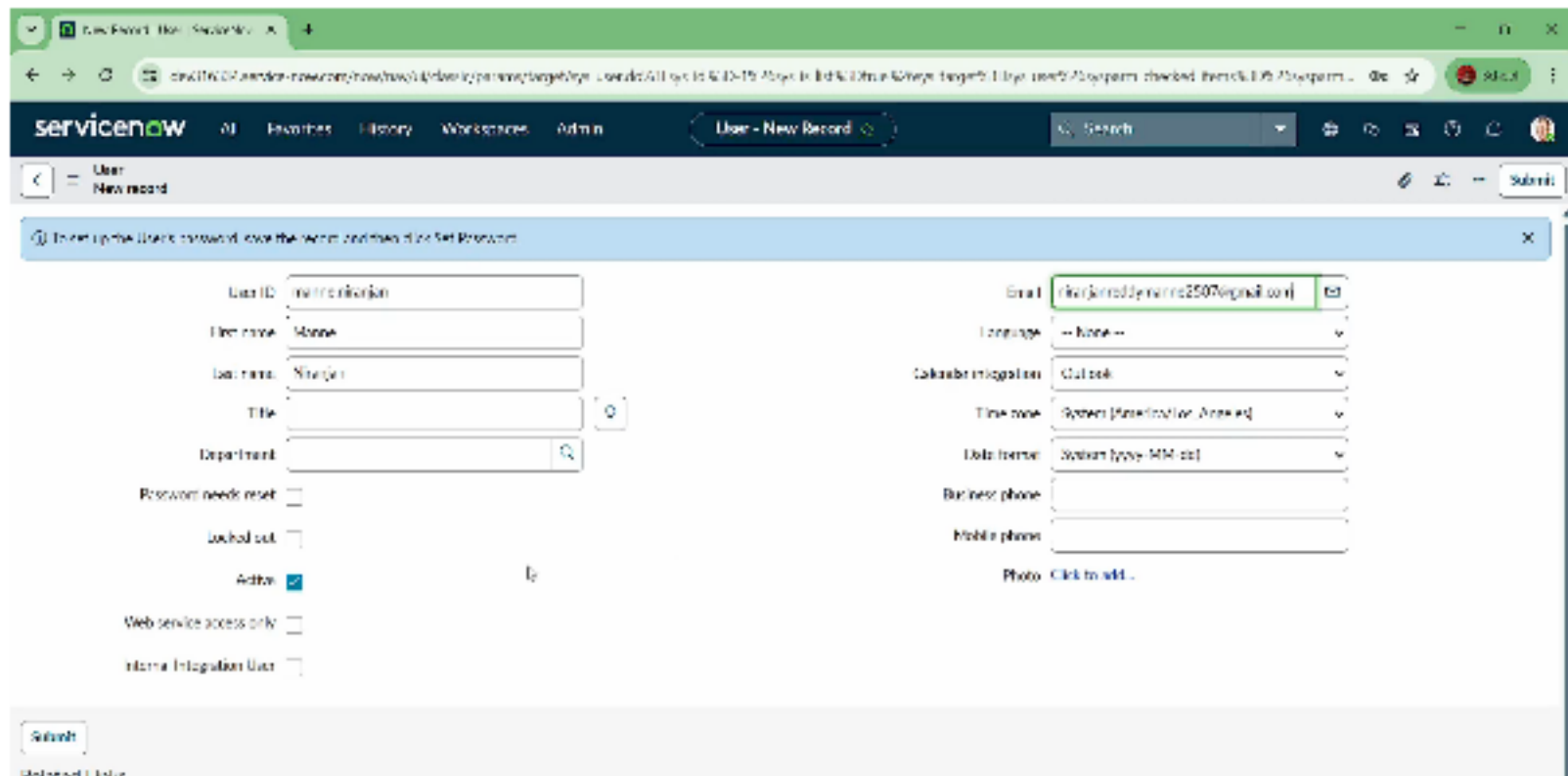
Skills:

- **Platform Administration:** Managing settings, properties, and application stability.
- **Table & Form Configuration:** Building the custom *Operations related* table with proper fields and layouts.
- **Security Management:** Implementing ACLs to control access and ensure data integrity.
- **Flow Designer Automation:** Creating trigger-based workflows to automatically assign tickets to the right group.
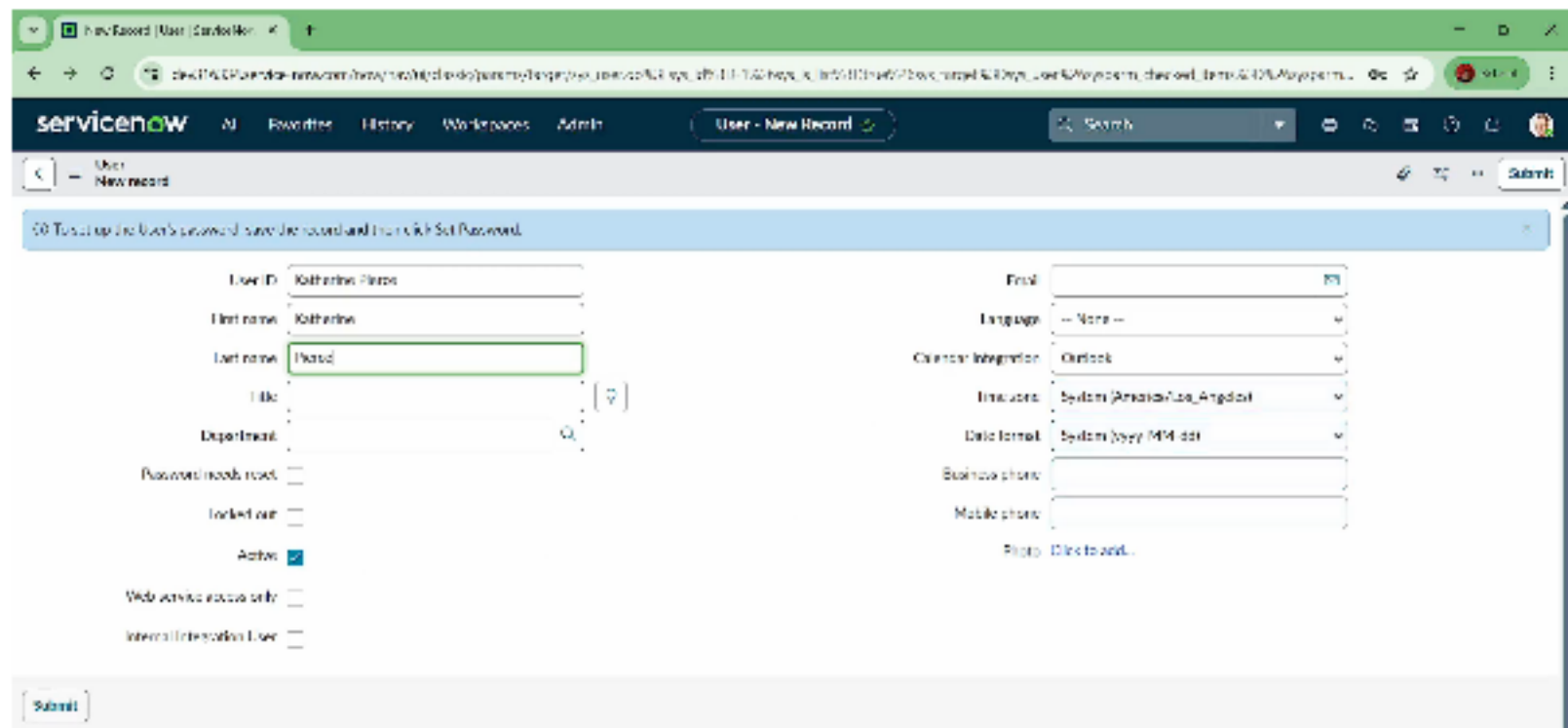
TASK INITIATION

Milestone 1 : Users

Activity 1: Create Users

1. Open **ServiceNow**.
2. Click on **All** in the left menu.
3. Type **"Users"** in the search bar.
4. Click on **Users** under **System Security**.
5. Click the **New** button to create a user.
6. Fill in the user details.
7. Click **Submit** to save the user.

8. To create another user, click **New** again.

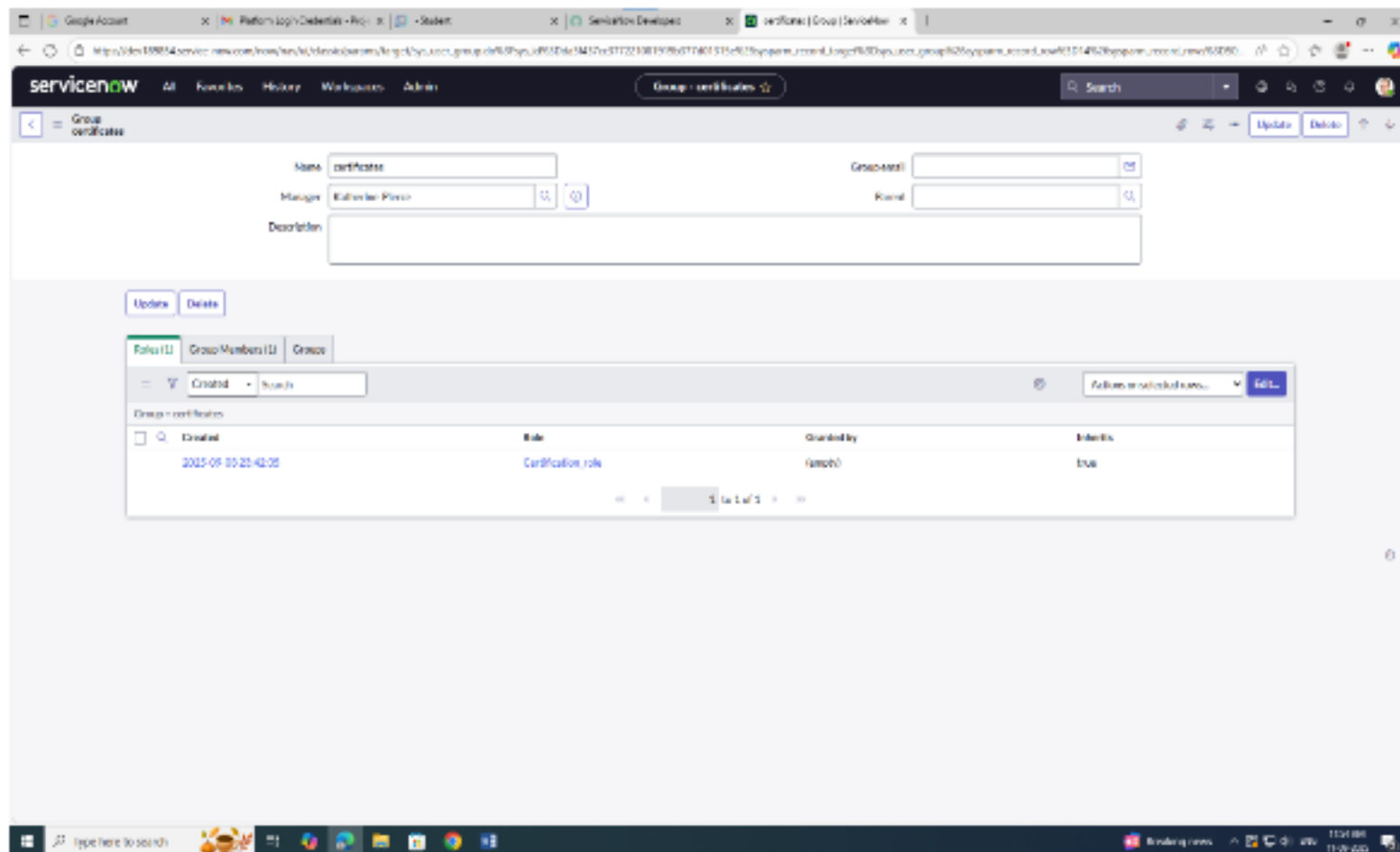9. Enter the details for the second user.

10. Click **Submit** to finish.

Milestone 2 : Groups

Activity 1: Create Groups

1. Open **ServiceNow**.
2. Click on **"All"** from the left-hand menu.
3. In the search bar, type **"Groups"**.
4. Under **System Security**, click on **"Groups"**.
5. Click the **"New"** button to create a new group.
6. Fill in the group details in the form.
7. Click **"Submit"** to save the group.
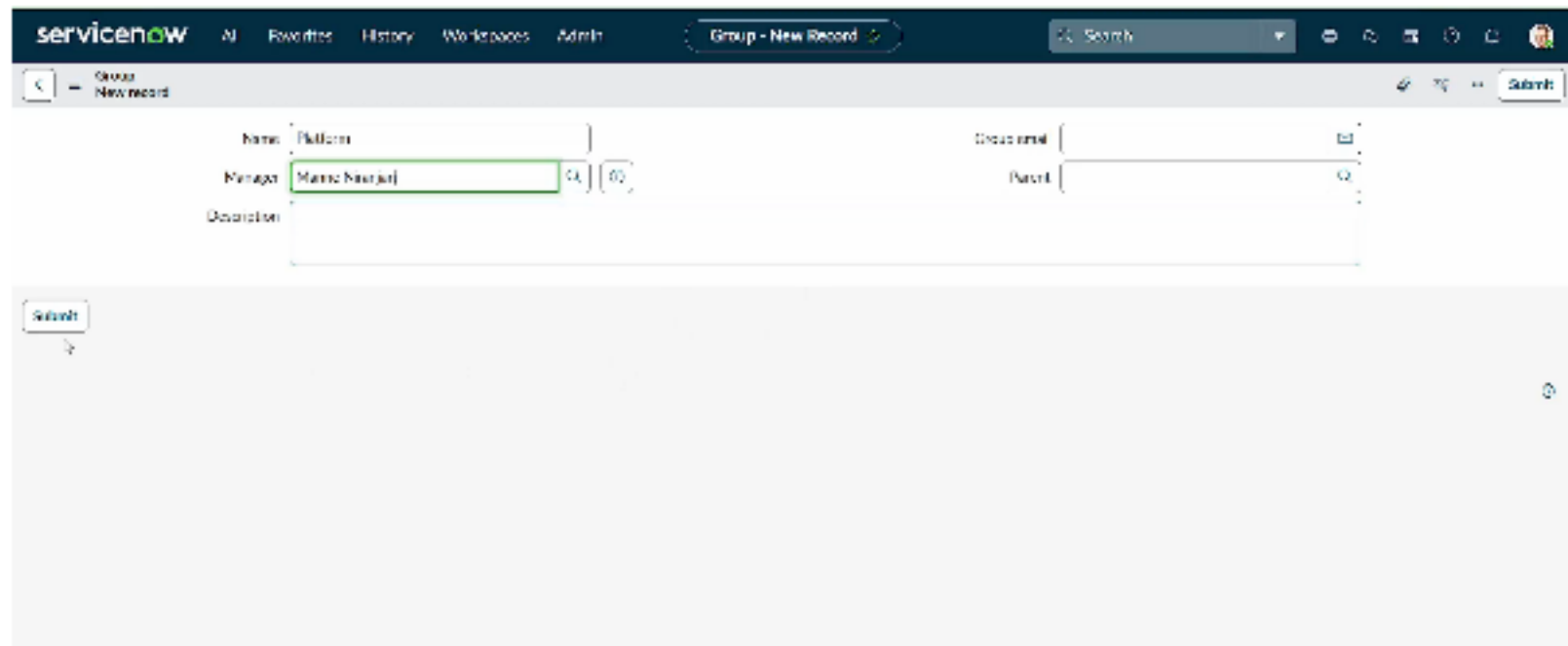
8. To create another group, click **"New"** again.
9. Enter the details for the second group.
10. Click **"Submit"** to save.
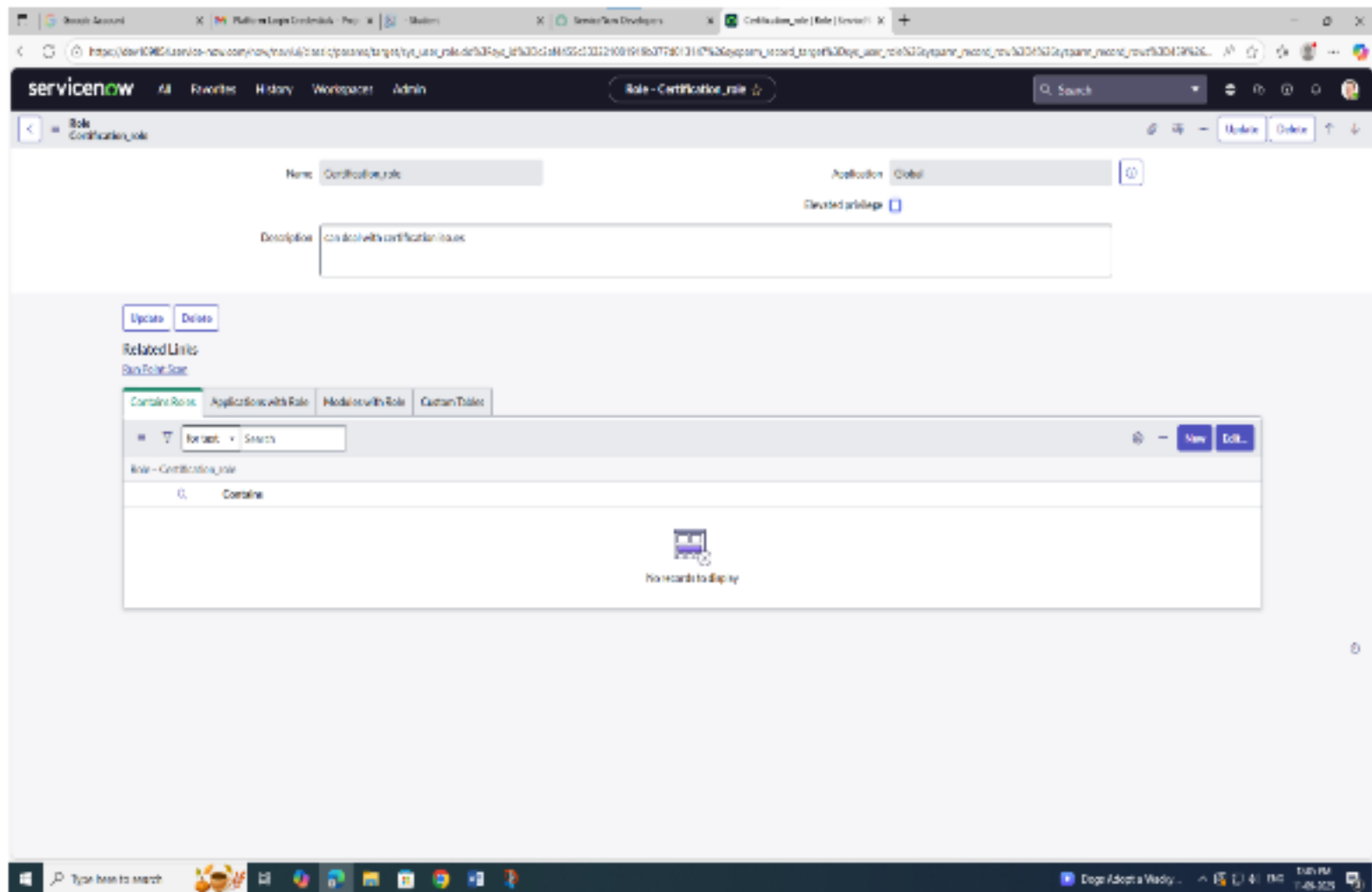
Milestone 3 : Roles

Activity 1: Create roles

1. Open **ServiceNow**.
2. Click on **"All"** from the left-hand side menu.
3. In the search bar, type **"Roles"**.
4. Under **System Security**, click on **"Roles"**.
5. Click the **"New"** button to create a new role.
6. Fill in the role details in the form.
7. Click **"Submit"** to save the role.

8. To create another role, click **"New"** again.

9. Enter the details for the second role.

10. Click **"Submit"** to save.
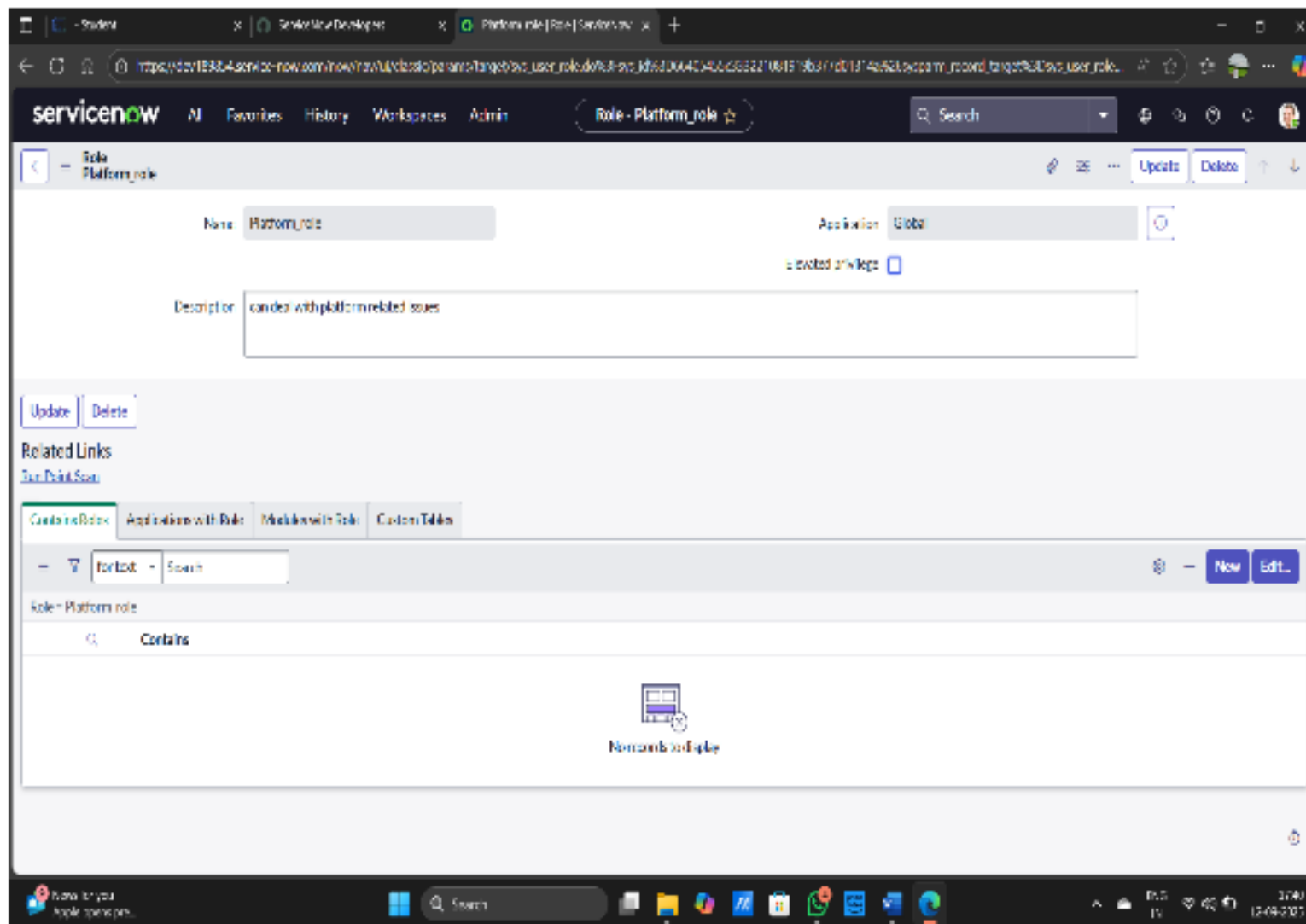
Milestone 4 : Table

Activity 1: Create Table

1. Open ServiceNow.
2. Click on **All** and search for **Tables**.
3. Select **Tables** under **System Definition**.
4. Click on **New**.
5. Fill in the following details to create a new table:
   Label: Operations related
6. Check the boxes **Create module** and **Create mobile module**.
7. Under **New menu name**, enter: Operations related
8. In the **Table Columns** section, add the required columns.
9. Click on **Submit**.
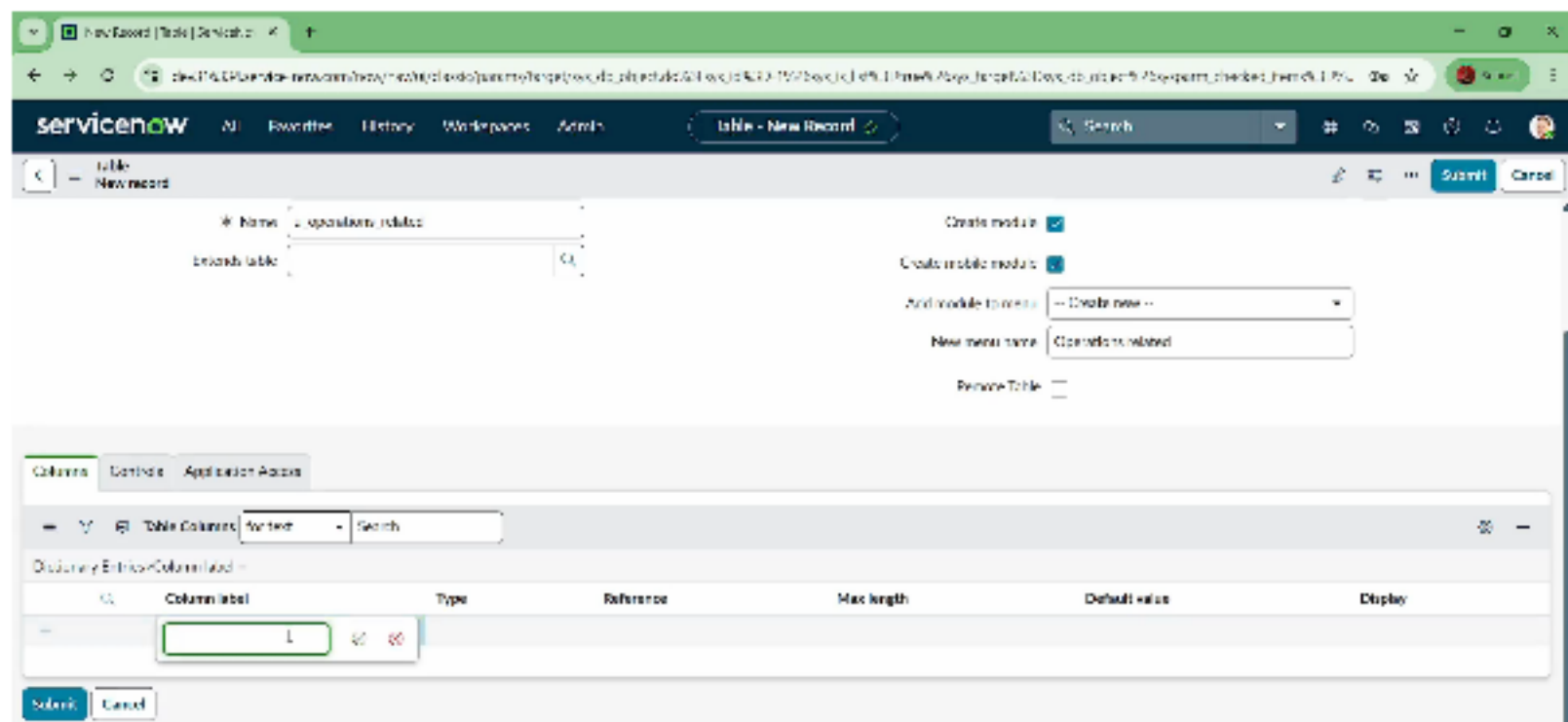
10. Create choices for the **Issue** field using **Form Design**.

11. The choices are:
    - unable to login to platform
    - 404 error
    - regarding certificates
    - regarding user expired

1.Click on submit

Milestone 5 : Assign roles and users to groups

Activity 1: Assign roles & users to certificate group

1. Open ServiceNow.
2. Click on All >> search for Tables.
3. Select Tables under System Definition.
4. Select the Certificates group.
5. Under Group Members, click on Edit.
6. Select Katherine Pierce and click Save.
7. Click on Roles.
8. Select Certification_role and click Save.

Activity 2: Assign roles & users to platform group

1. Open ServiceNow.

2. Click on **All** and search for **Tables**.

3. Select **Tables** under **System Definition**.

4. Choose the **Platform** group.

5. Under **Group Members**, click **Edit**.

6. Select **Manne Niranjan** and save your changes.

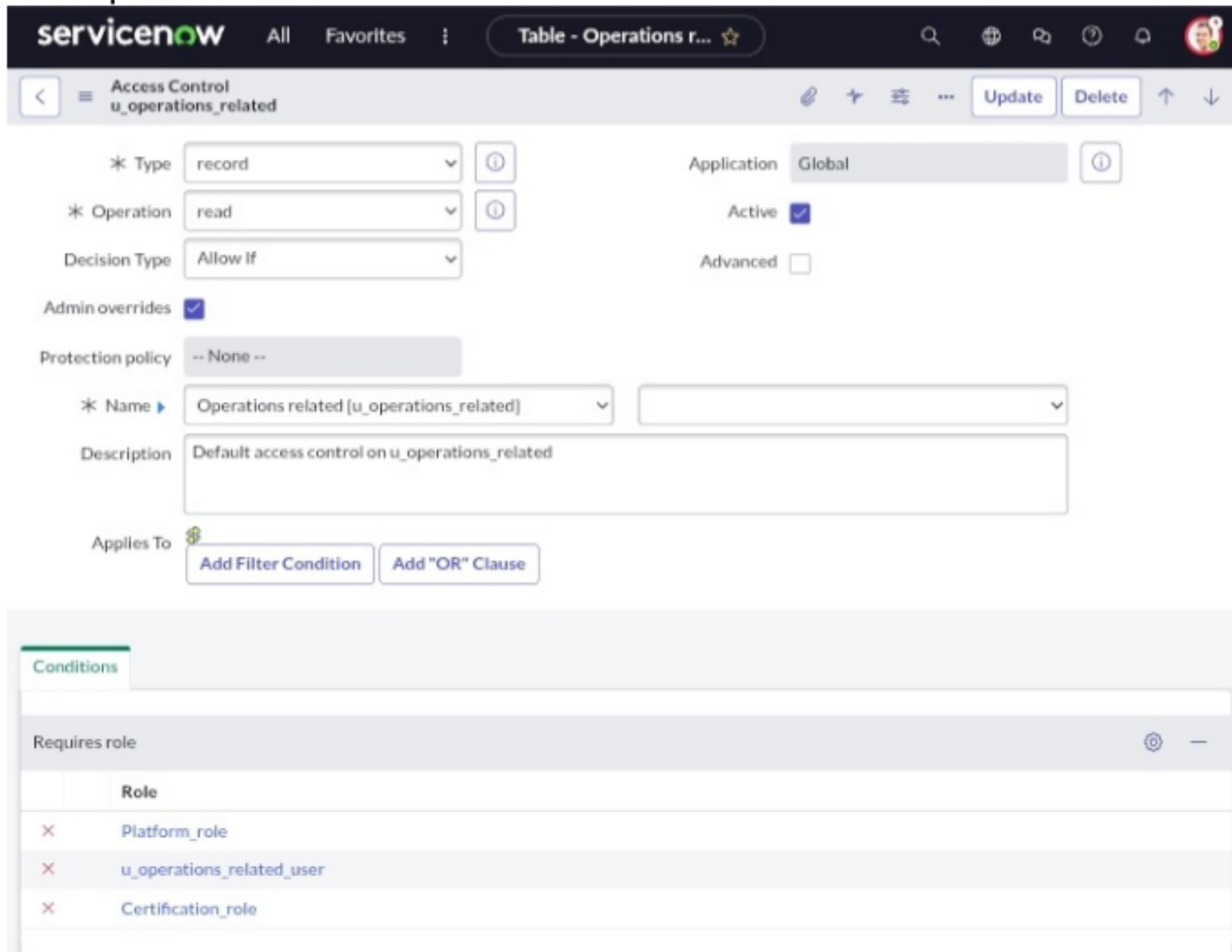7. Go to the **Roles** tab.

8. Select **Platform_role** and save.

Milestone 6 : Assign role to table

Activity 1: Assign roles to table

1. Open ServiceNow.
2. Click on **All** and search for **Tables**.
3. Select the **Operations Related** table.
4. Click on **Application Access**.
5. Click on **u_operations_related read operation**.
6. Click on your profile icon in the top right corner.
7. Select **Elevate Role**.
8. Choose **Security Admin** and click **Update**.

9. Under **Requires Role**, double-click to insert a new row.
10. Add **Platform Role** and **Certificate Role**.
11. Click **Update**.

12. Click on **u_operations_related write operation**.
13. Under **Requires Role**, double-click to insert a new row.
14. Add **Platform Role** and **Certificate** Role.
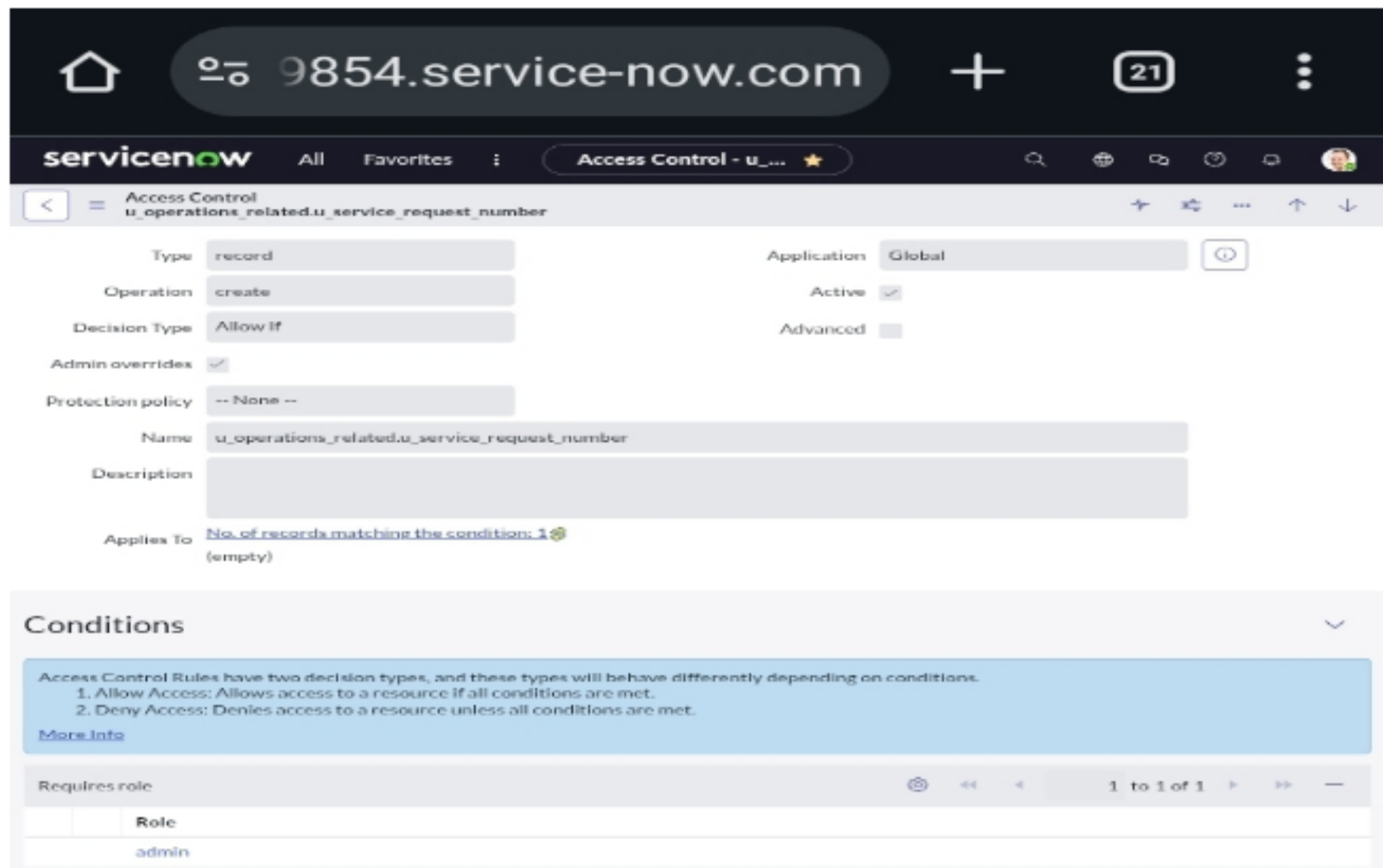
Milestone 7 : Create ACL

Activity 1: Create ACL

1. Open ServiceNow.
2. Click on **All** and search for **ACL**.
3. Select **Access Control (ACL)** under **System Security**.
4. Click **New** to create a new ACL.

5. Fill in the required details for the new ACL.

6. Scroll down to **Requires Role**.

7. Double-click to insert a new row.

8. Add the **admin** role.

9. Click **Submit**.

10. Repeat the above steps to create 4 ACLs for the following fields

Milestone 8 :Flow

Activity 1: Create a Flow to Assign operations ticket to group

1. Open ServiceNow.

2. Click on **All** and search for **Flow Designer**.

3.   Select **Flow Designer** under **Process Automation**.

4.   Click **New** and select **Flow**.

5.   Under **Flow Properties**, enter the Flow Name as **"Regarding Certificate"**.

6.   Set **Application** to **Global**.

7.   Select **Run user** as **System user** from the dropdown.

8.   Click **Submit**

9.   Click **Add a trigger**.

10.   Search for and select **Create or update a record** as the trigger.

11.   Set the **Table Name** to **Operations related**.

12.   Define the condition as:
    o   Field: **issue**
    o   Operator: **is**
    o   Value: **Regrading Certificates**

13.   Click **Done**.

14.   Under **Actions**, click **Add an action**.

15.   Search for and select **Update Record**.

16.   In the **Record** field, drag the fields from the data navigation panel on the left (the table will be assigned automatically).

17.   Set the field **Assigned to group** to the value **Certificates**.

18.   Click **Done**.

19.   Click **Save** to save the Flow.

20.   Click **Activate** to activate the Flow.

Activity 2: Create a Flow to Assign operations ticket to Platform group

1. Open ServiceNow and navigate to:
- All → Flow Designer (use the search bar for quick access).

2. In the Flow Designer window:
- Click New, then select Flow.

3. Configure Flow Properties:
- **Name**: Regarding Platform
- **Application**: Global
- **Run As**: Select System User
- Click **Submit**

4. Add a Trigger:
- Click **Add a Trigger**
- In the trigger selection window, search and select **Create or Update Record**
- **Table**: Operations related
- **Condition**:
  - **Field**: issue
  - **Operator**: is
  - **Value**: Unable to login to platform

5. Add Additional Trigger Conditions:
- Click **New Criteria**
  - **Field**: issue
  - **Operator**: is
  - **Value**: 404 Error
- Click **New Criteria**
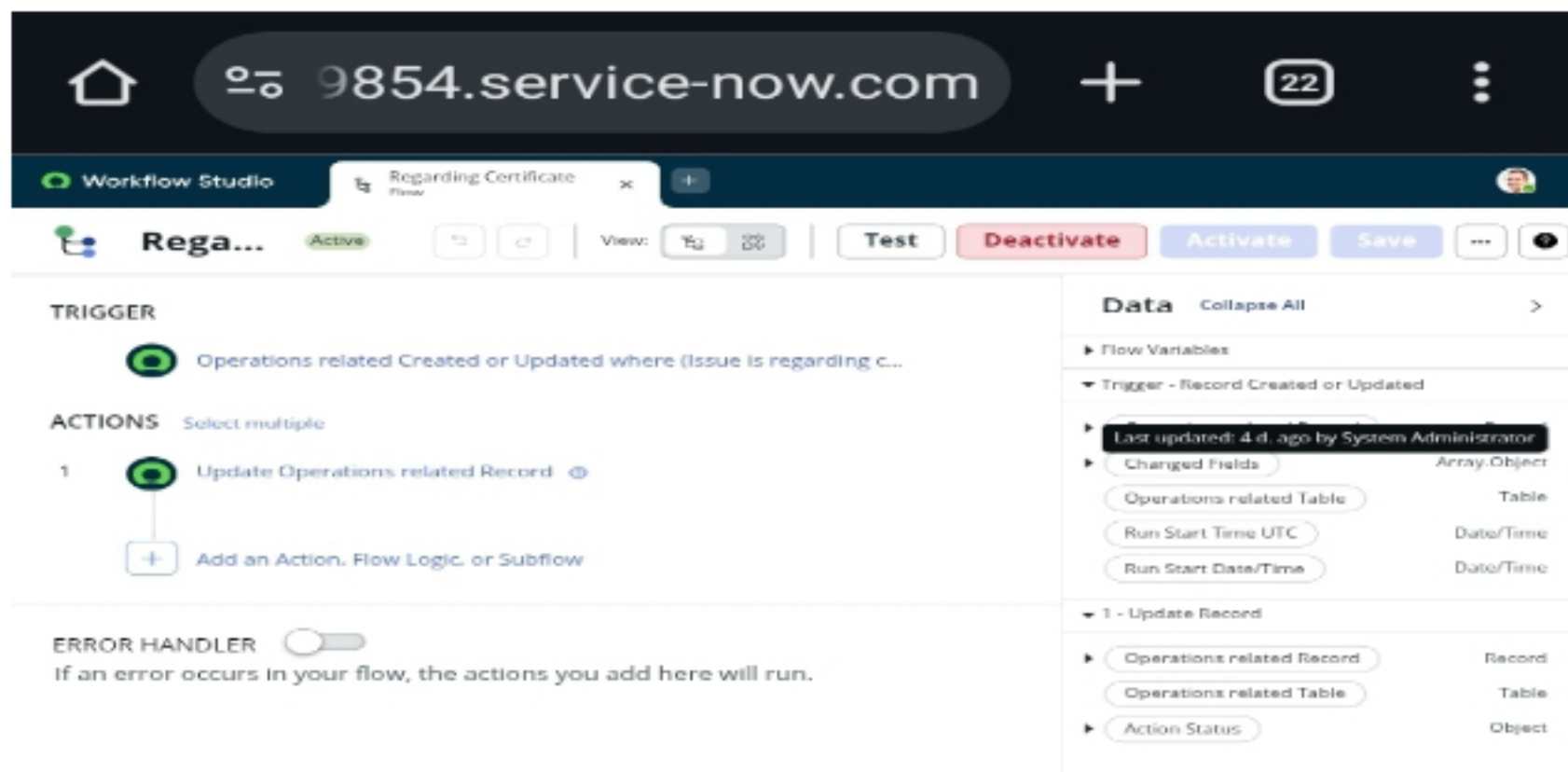 - **Field**: issue

      ○   **Operator**: is

      ○   **Value**: Regrading User expired

- Click **Done**

6. Add an Action:

- Click **Add an Action**
- Search for and select **Update Record**
- In the **Record** field, drag the appropriate data pill from the Data Panel on the left
- **Table**: auto-populated
- **Field to Update**: Assigned to group
- **Value**: Platform
- Click **Done**

7. Finalize the Flow:

- Click **Save** to save the flow
- Click **Activate** to enable it

Conclusion :

The implementation of the automated ticket routing system has successfully streamlined the support process by reducing manual effort and ensuring that tickets are directed to the right teams without delay. This has improved response times, enhanced operator efficiency, and increased overall customer satisfaction. By leveraging ServiceNow's automation and access control capabilities, the organization now has a more reliable, secure, and efficient support framework that can scale with future business needs