

**Streamlining Ticket Assignment for Efficient  
Support Operations**

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**Problem Statement :** 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 aims to reduce delays in issue resolution, enhance customer satisfaction, and optimize resource utilization within the support department.

**Objective :** To streamline the ticket assignment process in order to enhance the efficiency of support operations by reducing response times, ensuring equitable workload distribution, and improving overall customer satisfaction through intelligent automation and data-driven prioritization.

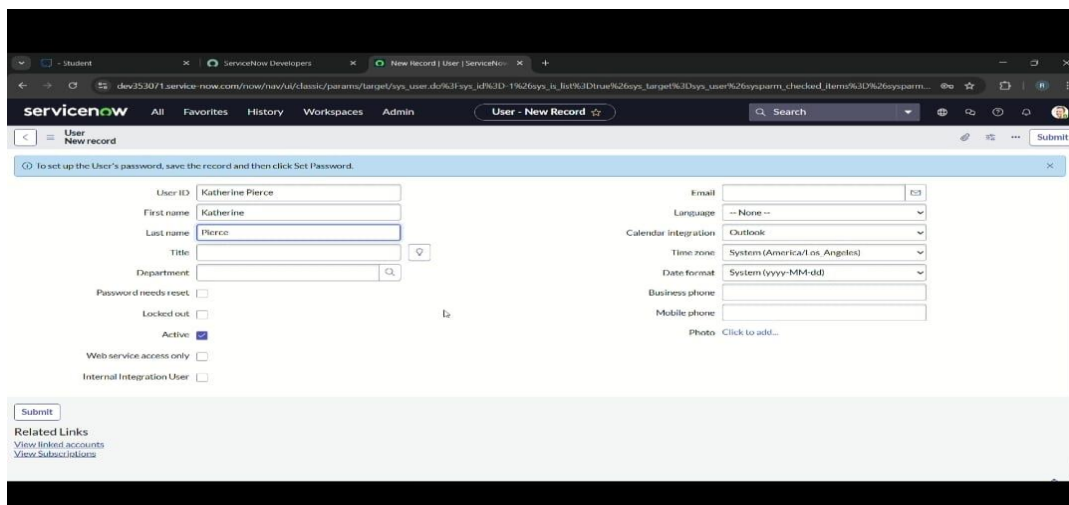
**Skills :** Efficient ticket assignment relies on automation, smart workflow design, and routing based on priority or expertise. Strong analytical and communication skills help optimize workloads and improve overall support operations.

# TASK INITIATION

## Milestone 1 : USERS

### Activity 1 : Create Users

1. Open service now.
2. Click on All >> search for users
3. Select Users under system security
4. Click on new
5. Fill the following details to create a new user



The screenshot shows the 'User - New Record' form in the ServiceNow interface. The form is titled 'User - New Record' and includes a 'Submit' button. A blue banner at the top of the form area states: 'To set up the User's password, save the record and then click Set Password.' The form fields are organized into two columns. The left column contains: 'User ID' (text field with 'Katherine Pierce'), 'First name' (text field with 'Katherine'), 'Last name' (text field with 'Pierce'), 'Title' (text field), 'Department' (text field with a search icon), 'Password needs reset' (checkbox), 'Locked out' (checkbox), 'Active' (checkbox, checked), 'Web service access only' (checkbox), and 'Internal Integration User' (checkbox). The right column contains: 'Email' (text field), 'Language' (dropdown menu with 'None' selected), 'Calendar integration' (dropdown menu with 'Outlook' selected), 'Time zone' (dropdown menu with 'System (America/Los Angeles)' selected), 'Date format' (dropdown menu with 'System (yyyy-MM-dd)' selected), 'Business phone' (text field), and 'Mobile phone' (text field). Below the 'Mobile phone' field is a 'Photo' field with a 'Click to add...' link. At the bottom left of the form, there is a 'Submit' button and a 'Related Links' section with two links: 'View linked accounts' and 'View SaaS links'.

6. Click on submit

## Create one more user:

7. Create another user with the following details

The screenshot shows the 'User - New Record' form in ServiceNow. The form is divided into two main sections. The left section contains fields for 'User ID', 'First name', 'Last name', 'Title', and 'Department'. The right section contains fields for 'Email', 'Language', 'Calendar integration', 'Time zone', 'Date format', 'Business phone', 'Mobile phone', and 'Photo'. There are also checkboxes for 'Password needs reset', 'Locked out', 'Active', 'Web service access only', and 'Internal Integration User'. A 'Submit' button is located at the bottom left of the form.

8. Click on submit

## Milestone 2 : GROUPS

### Activity 1 : Create Groups

1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group

ServiceNow Developers | New Record | Group | ServiceNow

dev353071.service-now.com/now/nav/ui/classic/params/target/sys\_user\_group.do%3Fsys\_id%3D-1%26sys\_is\_list%3Dtrue%26sys\_target%3Dsys\_user\_group%26sysparm\_checked\_items%3D...

Group - New Record

Name: certificates

Manager: Katherine Pierce

Group email:

Parent:

Description:

Submit

6. Click on submit

## Create one more group:

1. Create another group with the following details

ServiceNow Developers | New Record | Group | ServiceNow

dev353071.service-now.com/now/nav/ui/classic/params/target/sys\_user\_group.do%3Fsys\_id%3D-1%26sys\_is\_list%3Dtrue%26sys\_target%3Dsys\_user\_group%26sysparm\_checked\_items%3D...

Group - New Record

Name: Platform

Manager: Hanne Niranjan

Group email:

Parent:

Description:

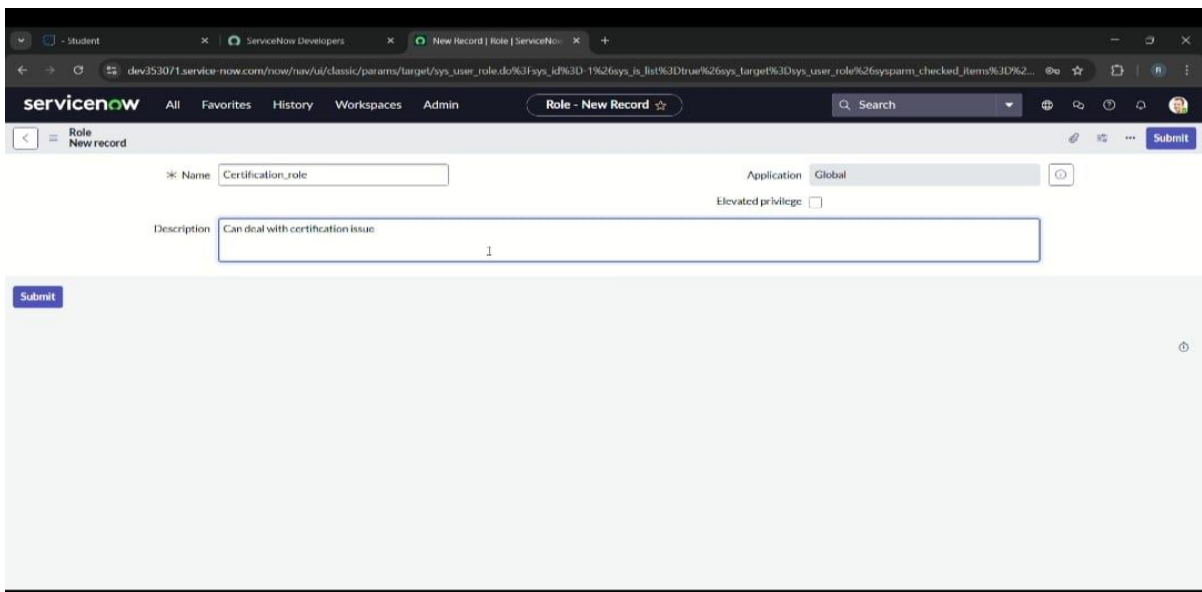
Submit

2. Click on submit

## Milestone 3 : ROLES

### Activity 1 : Create roles

1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role



The screenshot shows the ServiceNow 'Role - New Record' form. The form is titled 'Role - New Record' and shows fields for Name, Application, Description, and Elevated privilege. The Name field is filled with 'Certification\_role', Application is 'Global', and Description is 'Can deal with certification issue:'. A 'Submit' button is visible at the bottom left.

6. Click on submit

### Create one more role:

Create another role with the following details



The screenshot shows the ServiceNow 'Role - New Record' form for a second role. The form shows fields for Name, Application, Requires Subscription, Description, and Elevated privilege. The Name field is filled with 'Platform\_role', Application is 'Global', Requires Subscription is 'Unspecified', and Description is 'Can deal with platform related issues'. A 'Submit' button is visible at the bottom left.

The screenshot shows a web browser window with the ServiceNow interface. The browser's address bar displays a URL starting with 'dev353071.service-now.com'. The ServiceNow header includes the logo and navigation tabs: All, Favorites, History, Workspaces, and Admin. The current page title is 'Role - New Record'. The form contains the following fields:

- Name:** A text input field containing 'Platform\_role'.
- Application:** A dropdown menu set to 'Global'.
- Elevated privilege:** An unchecked checkbox.
- Description:** A text area containing 'Can deal with Platform related issue'.

A blue 'Submit' button is located at the bottom left of the form area.

Click on submit

## Milestone 4 : TABLE

### Activity 1 : Create Table

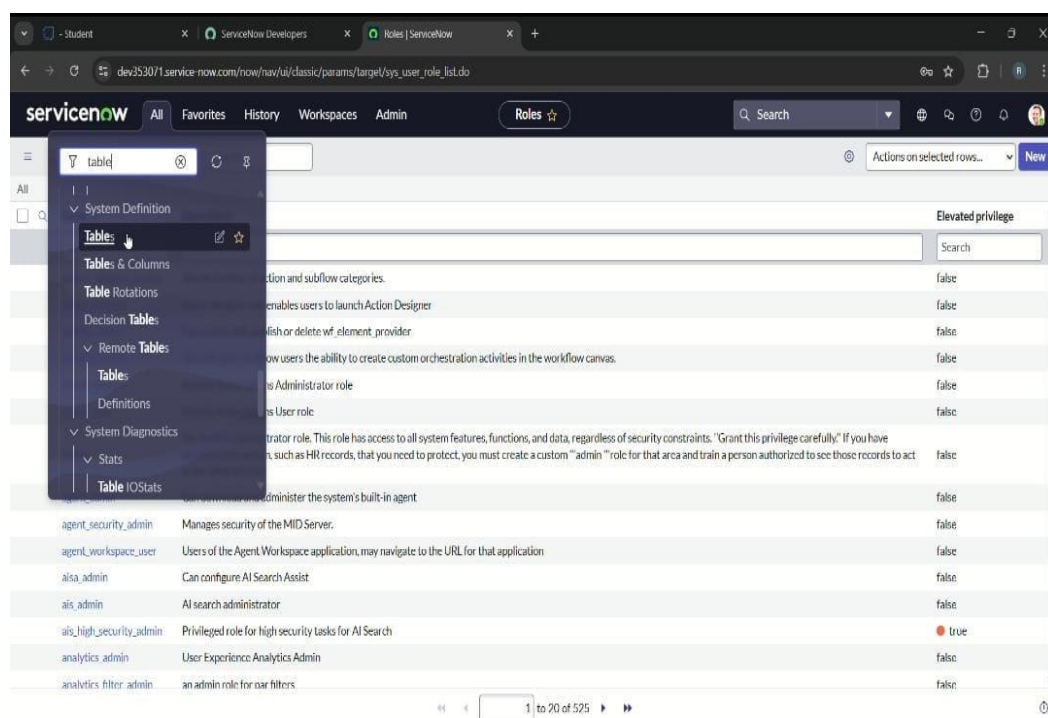
1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table

Label : Operations related

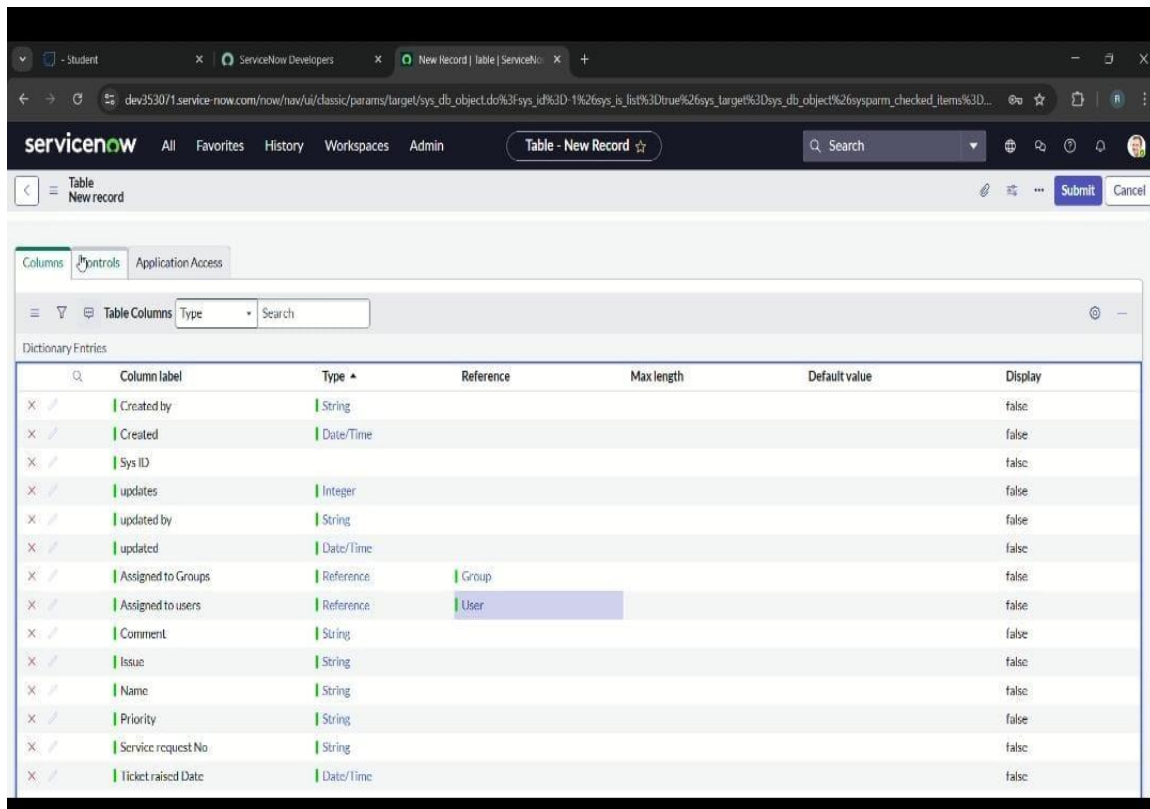
Check the boxes Create module & Create mobile module

6. Under new menu name : Operations related

7. Under table columns give the columns







8. Click on submit

Create choices for the issue file form design

## **Choices are**

- unable to login to platform
- 404 error
- regarding certificates
- regarding user expired

## **Milestone 5 : Assign roles & users to groups Activity 1 :**

### **Assign roles & users to certificate group**

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Select the certificates group
5. Under group members
6. Click on edit
7. Select Katherine Pierce and save
8. Click on roles
9. Select Certification\_role and save

### **Activity 2 : Assign roles & users to platform group**

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition

4. Select the platform group
5. Under group members
6. Click on edit
7. Select Manne Niranjana and save
8. Click on roles
9. Select Platform\_role and save

## **Milestone 6 : Assign role to table**

### **Activity 1 : Assign role to table**

1. Open service now.
2. Click on All >> search for tables
3. Select operations related table
4. Click on the Application Access
5. Click on u\_operations\_related read operation
6. Click on the profile on top right side
7. Click on elevate role
8. Click on security admin and click on update
9. Under Requires role
10. Double click on insert a new row
11. Give platform role
12. And add certificate role
13. Click on update

Access Control  
u\_operations\_related

Definition

Access Control Rules allow access to the specified resource if *all three* of these checks evaluate to true:

1. The user has one of the roles specified in the **Role** list, or the list is empty.
2. Conditions in the **Condition** field evaluate to true, or conditions are empty.
3. The script in the **Script** field (advanced) evaluates to true, or sets the variable "answer" to true, or is empty.

The three checks are evaluated independently in the order displayed above.

[More Info](#)

Requires role

Role
✗ u_operations_related_user
✗ Platform_role
✗ Certification_role
+ Insert a new row...

14. Click on u\_operations\_related write operation

15. Under Requires role

16. Double click on insert a new row

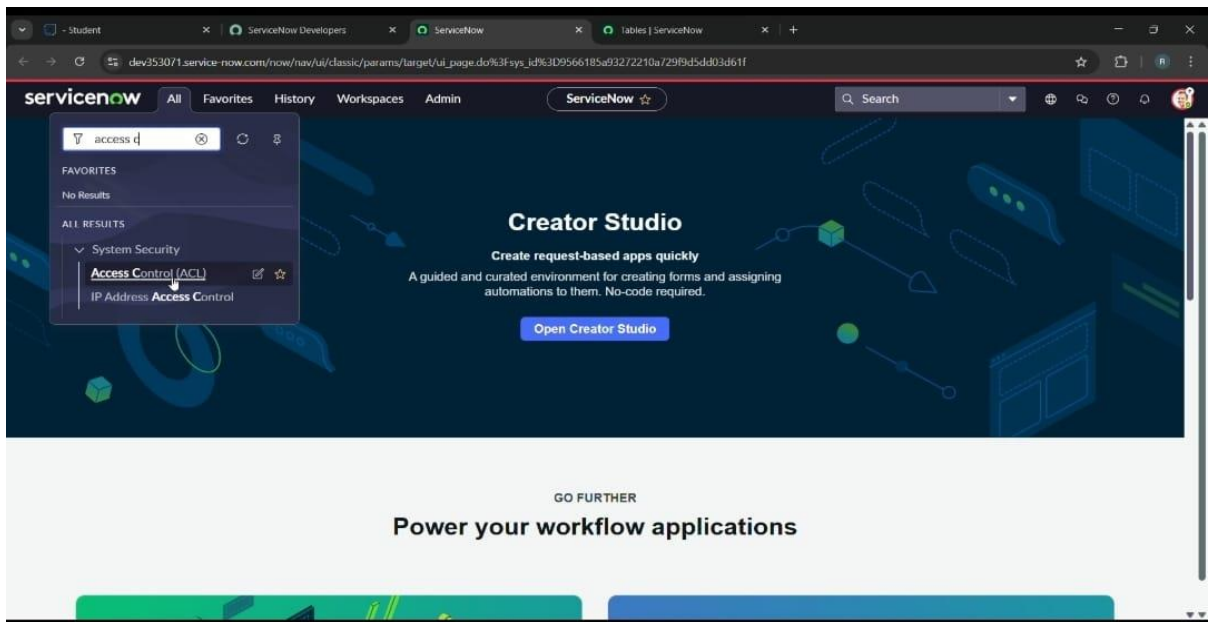
17. Give platform role

18. And add certificate role

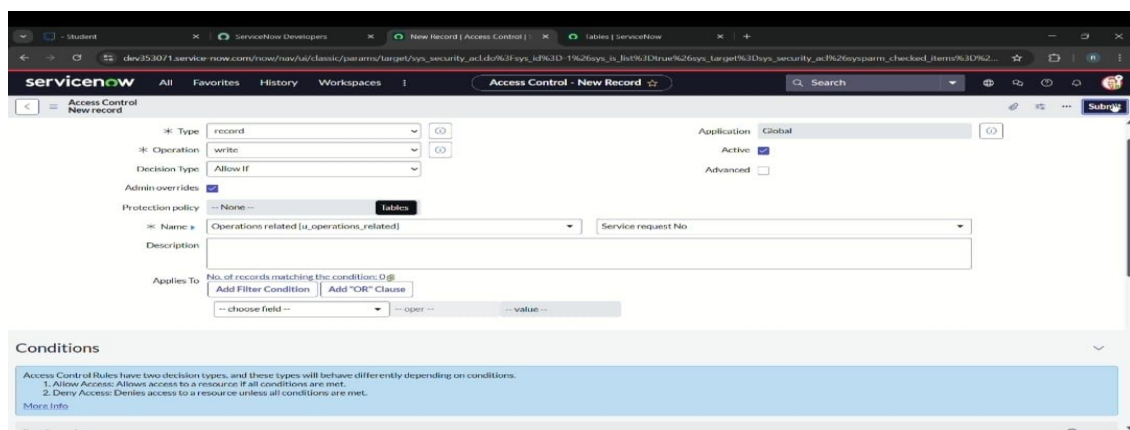
## Milestone 7 : Create ACL

### Activity 1 : Create ACL

1. Open service now.
2. Click on All >> search for ACL
3. Select Access Control(ACL) under system security
4. Click on new
5. Fill the following details to create a new ACL



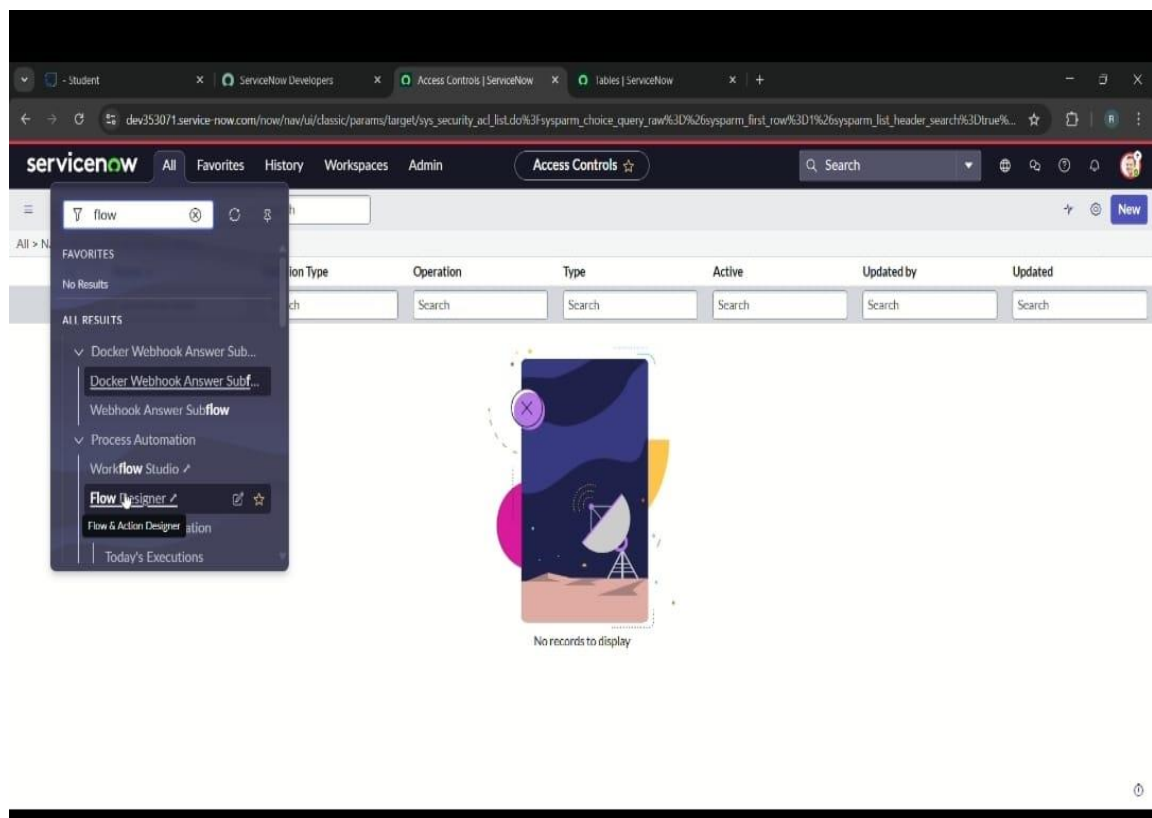
6. Scroll down under requires role
7. Double click on insert a new row
8. Give admin role
9. Click on submit
10. Similarly create 4 acl for the following fields



## Milestone 8 : Flow

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

1. Open service now.
2. Click on All >> search for Flow Designer
3. Click on Flow Designer under Process Automation.
4. After opening Flow Designer Click on new and select Flow.
5. Under Flow properties Give Flow Name as “ Regarding Certificate”.
6. Application should be Global.
7. Select Run user as “ System user ” from that choice.
8. Click on Submit.



Workflow Studio

### Let's get the details for your flow

Flow name \*

Application \*

Description

Hide additional properties

Protection  Option that you can select to specify that the flow runs as a system user or the user who initiates the session.

Run as

Flow priority default

Workflow Studio

Regarding certificates inactive

Test

**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 Record
- Changed Fields Array Object
  - Operations related Table Table
  - Run Start Time UTC Date/Time
  - Run Start Date/Time Date/Time

1 - Update Record

- Operations related Record Record
- Operations related Table Table
- Action Status Object

Status: Modified | Application: Global

1. Click on Add a trigger
2. Select the trigger in that Search for “create or update a record” and select that.
3. Give the table name as “ Operations related ”.
4. Give the Condition  
as  
Field : issue  
Operator : is  
Value : Regrading Certificates
5. After that click on Done.

TRIGGER

Operations related Created or Updated (Trigger: Created or Updated regarding certificates)

Trigger: Created or Updated

\* Table: Operations related [u\_operations\_related]

Condition: All of these conditions must be met

Issue is Regarding certificates

OR AND

New Criteria

Run Trigger: For every update

Advanced Options

Delete Cancel Done

6. Now under Actions.
7. Click on Add an action.
8. Select action in that search for “ Update Record ”.
9. In Record field drag the fields from the data navigation from left side
10. Table will be auto assigned after that
11. Give the field as “ Assigned to group ”
12. Give value as “ Certificates ”



13. Click on Done.
14. Click on Save to save the Flow.
15. Click on Activate.

Let's get the details for your flow

Flow name \*

Application \*

Description

Hide additional properties

Protection

Run as

Flow priority default

Cancel Build flow

Regarding Platform inactive

Test Activate Save

TRIGGER

Operations related Created or Updated where (Issue is unable to login to platform)

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 Record

Changed Fields Array/Object

Operations related Table Table

Run Start Time UTC Date/Time

Run Start Date/Time Date/Time

1 - Update Record

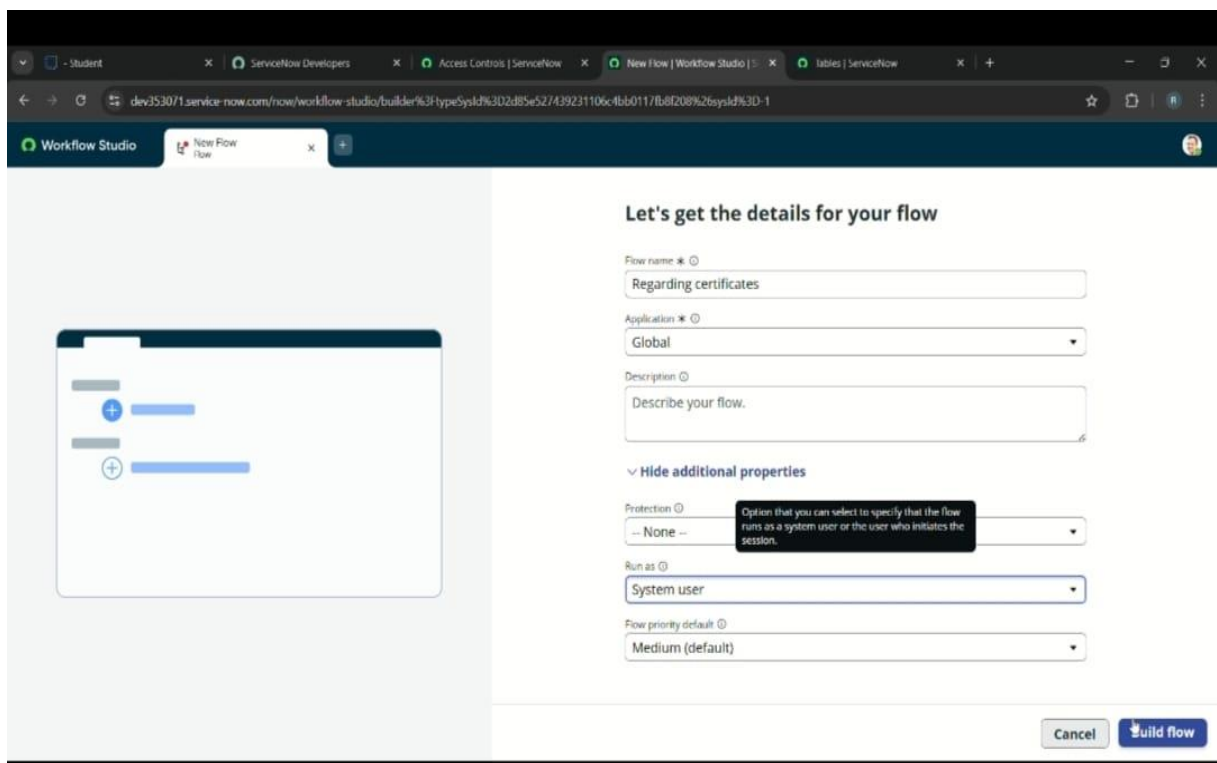
Operations related Record Record

Operations related Table Table

Action Status Object

Status: Modified Application: Global

1. Open service now.
2. Click on All >> search for Flow Designer
3. Click on Flow Designer under Process Automation.
4. After opening Flow Designer Click on new and select Flow.
5. Under Flow properties Give Flow Name as “ Regarding Platform ”.
6. Application should be Global.
7. Select Run user as “ System user ” from that choice.



8. Click on Submit.
  1. Click on Add a trigger
  2. Select the trigger in that Search for “create or update a record” and select that.
  3. Give the table name as “ Operations related ”.
  4. Give the Condition as

Field : issue

Operator : is

Value : Unable to login to platform

5. Click on New Criteria

Field : issue

Operator : is Value

: 404 Error

6. Click on New Criteria

Field : issue

Operator : is

Value : Regrading User expired

7. After that click on Done.

8. Now under Actions.

9. Click on Add an action.

10. Select action in that search for “ Update Record ”.

11. In Record field drag the fields from the  
data navigation from left side

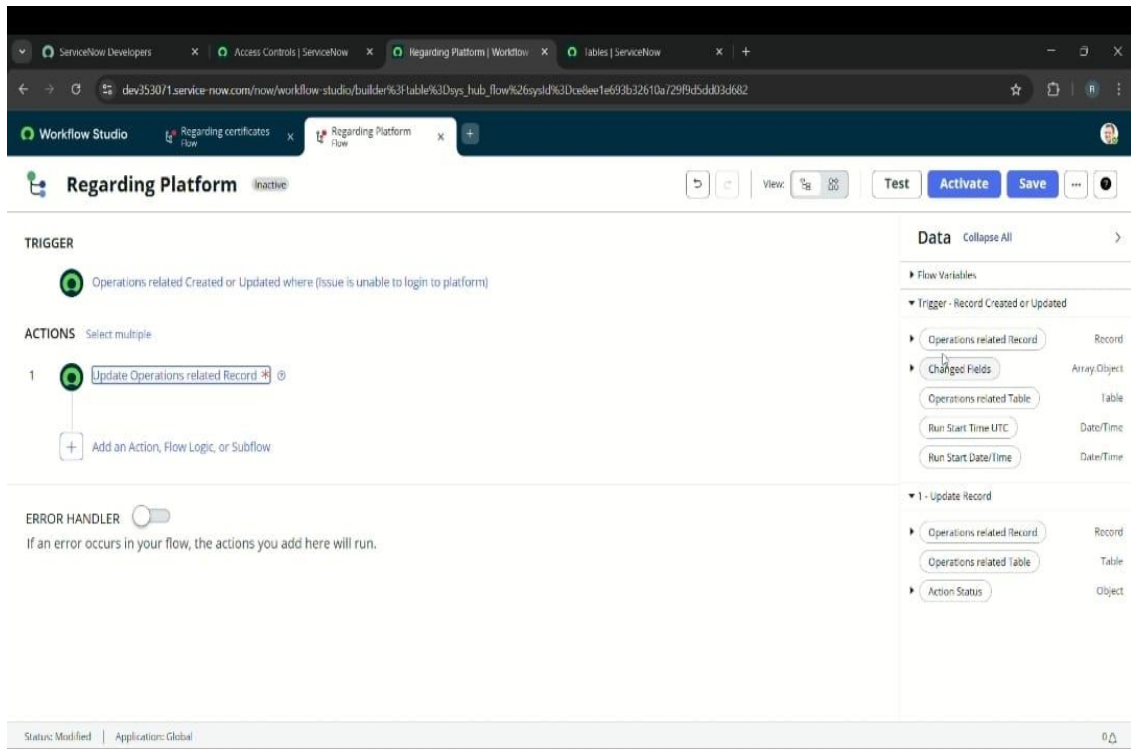
12. Table will be auto assigned after that

13. Give the field as “ Assigned to group ”.

14. Give value as “ Platform ”.

15. Click on Done.

16. Click on Save to save the Flow.



17. Click on Activate.

## Conclusion

- The implementation of the automated ticket routing system at ABC Corporation has been a significant success. By leveraging the capabilities of ServiceNow, we have streamlined the process of assigning support tickets to the appropriate teams, addressing the challenges of manual routing, and ensuring timely resolution of issues.

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