

Streamlining Ticket Assignment for Efficient Support Operations

Problem statement:

In many support organizations, ticket assignment is often handled manually or through rigid rules. This process leads to inefficiencies such as delayed response times, uneven workload distribution among agents, and lack of transparency in ticket ownership. As the volume of support requests increases, manual assignment becomes error-prone, resulting in lower customer satisfaction and higher operational costs.

There is a need for a streamlined, intelligent ticket assignment system that can automatically categorize, prioritize, and route tickets to the most suitable agents based on factors such as expertise, availability, workload, and service-level agreements (SLAs). Such a system should reduce manual intervention, optimize resource utilization, and enhance the overall efficiency of support operations while ensuring timely resolution for customers.

SKILLS:

- Portal login & navigation
- User, group, and role handling
- Ticket management
- Workflow design

OBJECTIVE:

The objective is to automate ticket assignment in order to minimize manual effort and ensure a fair distribution of workload among support agents. By intelligently matching tickets with agents based on their expertise and availability, the process will help reduce response and resolution times for customer issues. This approach aims to improve transparency and accountability in ticket ownership, while enhancing overall customer satisfaction and operational efficiency.

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. Fill the following details to create a new user

The screenshot shows the 'User' profile page for 'Manne Niranjan' in ServiceNow. The form is divided into two main sections: 'Basic Information' on the left and 'Advanced Information' on the right. The 'Basic Information' section includes fields for User ID (manne.niranjan), First name (Manne), Last name (Niranjan), Title (empty), and Department (empty with a search icon). Below these are checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), 'Web service access only', and 'Internal Integration User'. The 'Advanced Information' section includes fields for Email (niranjanreddymanne2507@gr), 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 also present. At the top right, there are buttons for 'Update', 'Set Password', and 'Delete', along with up and down arrow icons.

Field	Value
User ID	manne.niranjan
First name	Manne
Last name	Niranjan
Title	
Department	
Password needs reset	<input type="checkbox"/>
Locked out	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Web service access only	<input type="checkbox"/>
Internal Integration User	<input type="checkbox"/>
Email	niranjanreddymanne2507@gr
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...

5. Click on submit
6. Create one more use

7. Create another user with the following details

The screenshot shows a user management interface. At the top, there's a navigation bar with 'Favorites', 'History', 'Workspaces', and 'Admin'. A search bar and a user profile icon are also present. Below the navigation bar, the page title is 'User - Katherine Pierce'. The form contains the following fields and options:

- User ID: Katherine Pierce
- First name: Katherine
- Last name: Pierce
- Title: (empty)
- Department: (empty)
- Language: -- None --
- Calendar integration: Outlook
- Time zone: System (America/Los Angeles)
- Date format: System (yyyy-MM-dd)
- Business phone: (empty)
- Mobile phone: (empty)
- Photo: Click to add...
- Password needs reset: ☐
- Locked out: ☐
- Active: ☒
- Web service access only: ☐
- Internal Integration User: ☐

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

The screenshot shows a group management interface. At the top, there's a navigation bar with 'Group certificates'. The form contains the following fields and options:

- Name: certificates
- Group email: (empty)
- Manager: Katherine Pierce
- Parent: (empty)
- Description: (empty)

6. Click on submit

Create one more group:

1. Create another group with the following details

Name	<input type="text" value="Platform"/>	Group email	<input type="text"/>	
Manager	<input type="text" value="Manne Niranjana"/>	Parent	<input type="text"/>	
Description	<input type="text"/>			

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

Name	<input type="text" value="Certification_role"/>	Application	<input type="text" value="Global"/>	
Requires Subscription	<input type="text" value="Unspecified"/>	Elevated privilege	<input type="checkbox"/>	
Description	<input type="text" value="Can deal with certification issues"/>			

6. Click on submit

Create one more role:

1. Create another role with the following details

Name	<input type="text" value="Platform_role"/>	Application	<input type="text" value="Global"/>	
Requires Subscription	<input type="text" value="Unspecified"/>	Elevated privilege	<input type="checkbox"/>	
Description	<input type="text" value="Can deal with platform related issues"/>			

2. Click on submit

Milestone 4: Tables

Activity 1: Create Tables

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

Q	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...					

8. Click on submit

Create choices for the issue filed by using form design
Choices are

1. unable to login to platform
2. 404 error
3. regarding certificates
4. regarding user expired

Milestone 5: Assign roles s User 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 roles to tables

Activity 1: Assign roles to tables

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

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Access Control
u_operations_related

Update

Delete

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

⏪ ⏩ 1 to 3 of 3 ⏪ ⏩ —

	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

- Fill the following details to create a new ACL

The screenshot shows the 'Access Control' configuration form for the field 'u_operations_related.u_service_request_no'. The form includes the following fields and options:

- Type:** record
- Operation:** write
- Application:** Global
- Active:** ☒
- Advanced:** ☐
- Admin overrides:** ☒
- Protection policy:** -- None --
- Name:** Operations related [u_operations_related] (dropdown) and Service request No (dropdown)
- Description:** (empty text area)
- Condition:** 4 records match condition (with a green status icon). Below this are buttons for 'Add Filter Condition' and 'Add "OR" Clause'. At the bottom, there are dropdowns for '-- choose field --', '-- oper --', and '-- value --'.

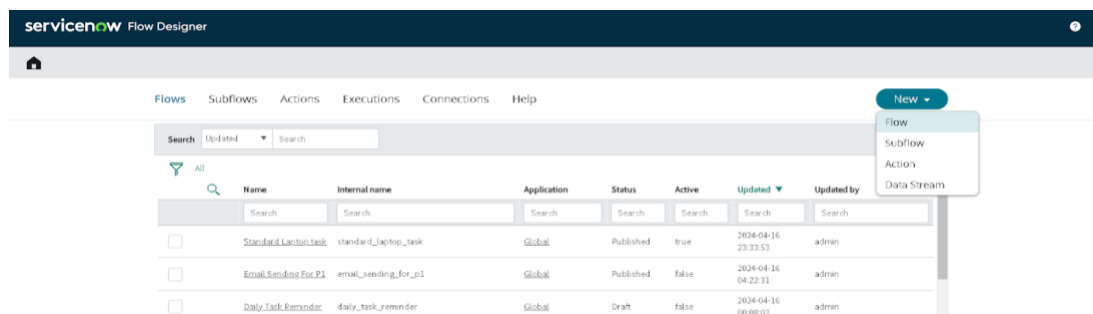
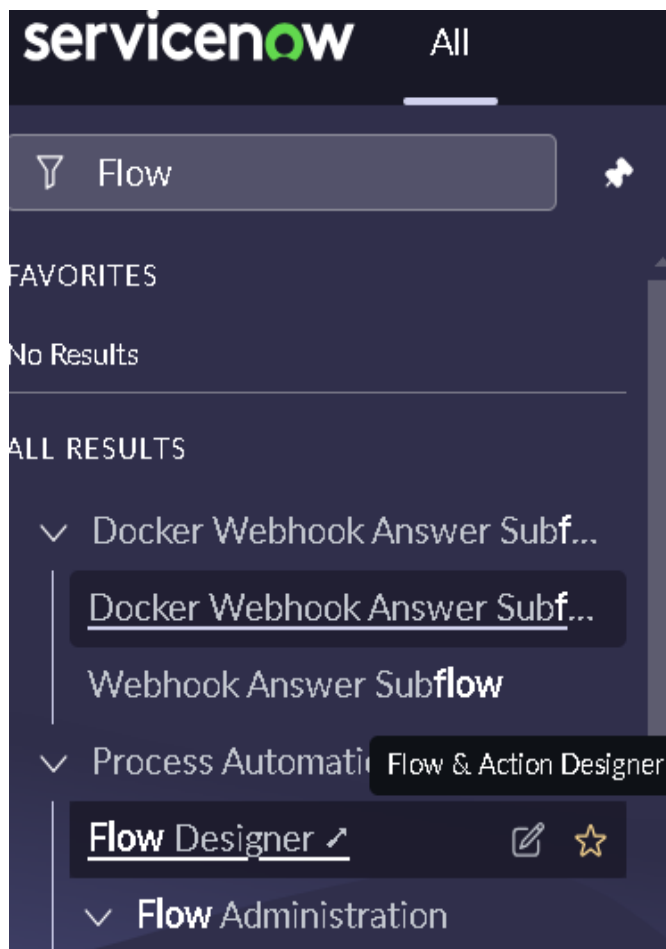
- Scroll down under requires role
- Double click on insert a new row
- Give admin role
- Click on submit
- Similarly create 4 acl for the following fields

<input type="checkbox"/>	<input type="info"/>	u_operations_related.u_priority	write	record	true	admin	2024-04-16 22:32:12
		u_operations_related.u_ticket_raised_date	write	record	true	admin	2024-04-16 22:30:22
		u_operations_related.u_name	write	record	true	admin	2024-04-16 22:29:00
		u_operations_related.u_issue	write	record	true	admin	2024-04-16 22:23:31
		u_operations_related.u_service_request_no	write	record	true	admin	2024-04-16 22:17:14

Milestone 8: Flow

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

- Open service now.
- Click on All >> search for Flow Designer
- Click on Flow Designer under Process Automation.
- After opening Flow Designer Click on new and select Flow.
- Under Flow properties Give Flow Name as " Regarding Certificate".
- Application should be Global.
- Select Run user as " System user " from that choice.
- Click on Submit.



Flow properties

* Flow name

Regarding certificates

Description

Describe your flow

Application

Global

Protection

-- None --

Run As

System User

Cancel

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 : 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.

ACTIONS Select multiple

1 **Update Operations related Record**

Action: Update Record

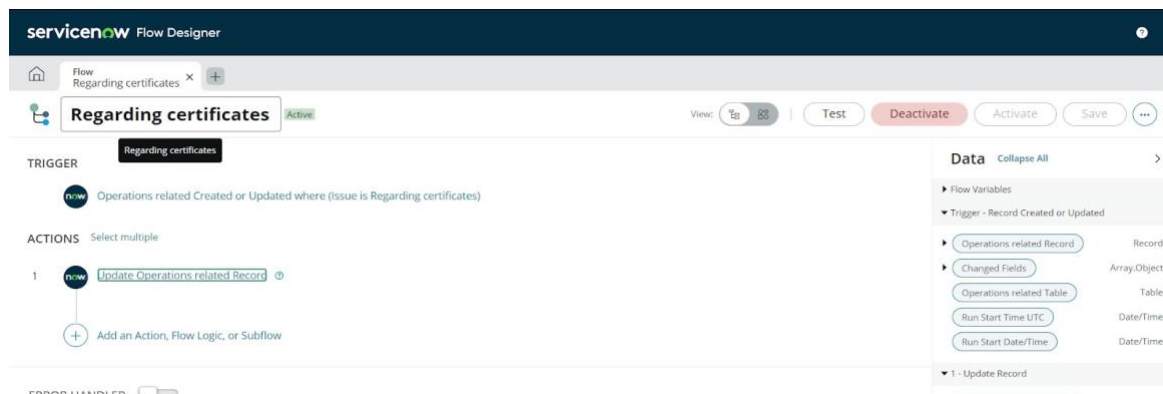
* Record: Trigger ... Operations relate...

* Table: Operations related [u_operations_related]

* Fields: Assigned to group certificates

+ Add field value

Delete Cancel Done



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